

Metro Tourism and Convention Commission
Tuesday, March 3, 2026
Time: 8:30am
Location: 500 11th Avenue North, Suite 650, Nashville, TN

Leesa LeClaire called the meeting to order at 8:32 a.m.

Commissioners Present:

- Leesa LeClaire, Chair
- Mark Hayes, Vice Chair
- Sherry Franklin
- Dr. Sybril Brown
- Nealy Glen
- Tom Petrillo
- Q-Juan Taylor
- Derrick Free
- Rob Higgins

Metro Staff:

Courtney Mohan, Legal Counsel
Jamari Brown
Metro IT Representatives

Nashville Convention and Visitor Corp (NCVC) Staff:

Deana Ivey
Jeff Mefford
Bruce McGregor
Heather Middleton
Adrienne Siemers
Andrea Arnold
Brad Lineberry
Ashley Warrington

Nashville Downtown Partnership:

Tom Turner
Ben Simpson

Following roll call, Leesa LeClaire opened the public comment period.
Judson Newborn and Ian Rhett spoke in support of the Nashville Highland Rim Forest.

Chair LeClaire closed public comment. The meeting moved to the rest of the agenda.
LeClaire requested approval for the minutes of the December meeting.

Mark Hayes motioned to approve the December 2, 2025 minutes; Sybil Brown seconded the motion; the motion passed unanimously.

LeClaire asked Jeff Mefford, Chief Financial Officer of the NCVC, to provide the financial report. He provided the following highlights:

- Mefford reminded the Commission that no surplus or profit was provided to the NCVC through metro resources. The NCVC is only reimbursed for actual expenses incurred in the promotion of the city.
- Costs are running in line with expectations and continue to proceed in line with expectations.
- Hotel Tax collections through November were just over \$67.6 million. The portion of that which is dedicated to Tourism Promotion of \$19.6 million and exceeds the NCVC's expense reimbursement requests through the 6 months of July - December. This is a new all-time record for any single month in the city's history.
- Year to date total reimbursement requested by the NCVC from our metro contract for the period was \$20,268,019.
- Total revenue received for the period from all sources was \$27,284,296 including the additional revenue that the NCVC obtained from other sources to supplement our Metro contract funding.
- Total expenses incurred for tourism promotion activities during the 7 months were \$27,284,296.

Sherry Franklin motioned to approve the Financial Report; Nealy Glen seconded the motion; and the motion passed unanimously.

LeClaire asked Bruce McGregor, Senior Vice President of Research with the NCVC, to provide a research update. He provided the following highlights:

- Nashville plans to welcome 17.8 million visitors with 11.8 million being overnight guests in 2026.
- 2025 in Review:
 - o 2025 occupancy declined slightly to 67%. Average daily rate declined by about 1.3%. RevPAR had about a 2% decrease. Supply increased by 3.4%. Room revenue overall was up 1.2%.
 - o Comparing room demand month-to-month from 2024 to 2025, only February and April saw a decrease. May and October set records for single month sales. October was 3% higher and 995,239 rooms were sold – a 4% increase compared to previous year.
 - o CoSTAR results showed December demand was up by 7.8% due to new events such as NCAA college basketball games on December 5th and 6th. Downtown hotel demand that weekend was up 8.8% YOY.

- Countywide, 2025 was a record year for the countywide hotels selling more hotel rooms than ever before – 10.2 million rooms. May, June, August, September, October, and November were peak months of leisure and business travelers.
- The downtown hotel cluster specifically saw annual supply increase by 4.9% and near equal demand growth of 5% with 3.9 million rooms sold. This makes up just over half of the total room revenue for the entire city. The downtown hotel cluster saw monthly demand performance increases every month with March seeing a gain of 9.8% and October seeing a 5.1% growth rate.
- Short-term rentals continued to see a nationwide increase and a 6.9% increase in demand in Nashville. STRs saw a positive month every month of 2025, with March and May leading with a 12% increase in demand. It is estimated that there are about 9,500 active listings available, with 29% being 4-bedroom units.
- Short-term rentals result in \$540 million in annual revenue making up 21% of the city's \$2.6 billion in total lodging revenue in city occupancy tax.
- According to Tourism Economics, Nashville welcomed 17.39 million visitors traveling at least 50 miles in 2025. This was a 2.7% increase from 2024.
- International travel set a record high of 420,000 in 2024. Nashville saw a 13.4% decrease in YOY of international visitors in 2025. There were 364,000 visitors, which was below 2019 numbers.
- Nashville has been impacted by the negative Canadian travel sentiment with over half of Nashville's international visitors being Canadian. In 2025 we lost 22% of our Canadian visitors, 5.8% of UK visitors, and 4% total overseas visitors.
- BNA set record highs of 25.7 million last year and a peak of 114 non-stop flights and growth in international passengers.
- BNA now ranks 29th among the top 50 U.S. airports for international O&D traffic and has seen an increase of 30% over the last decade. Europe continues to be the largest and fastest growing international region making up 33% of total international passengers at BNA. This is fueled in part by the new nonstop service on Icelandair and Aer Lingus introduced in 2025.
- Nashville's visitors spend was \$11.64 billion. An annual increase of 3.7%.
- January was heading towards a good month prior to the winter storm wreaking havoc across the city. Demand was up 6.5% through January 24th.
- The last week of January saw a spike in demand largely due to displacement of local residents. The data shows that hotels acted compassionately with 21.5% increase in demand and 16.1% decrease in ADR compared to the year before. The weekly average rate was \$156.
- The first 21 days of February saw demand up by 13.3% and hotel rates up 2.6% pushing RevPAR up by 13.4% YOY.

- Valentine's Day saw hotel occupancy at 85.8% across the city and 89.3% downtown. Bridgestone Arena hosted Nashville Hoops Showdown that weekend that also led to increase in visitors.
- Music City Center also welcomed multiple large groups in February:
 - National Cattlemen's Beef Association – 3,515 peak
 - The School Superintendents Association – 3,855 peak
 - Safari Club – 18,000 attendees
- Bridgestone Arena had two sell-out concerts on February 20th and 21st yielding downtown hotel occupancy at 93.3%.
- Looking forward, Nissan Stadium once again has a full slate of major concerts.
 - May:
 - Bruno Mars
 - Chris Stapleton and Lainey Wilson
 - June:
 - CMA Fest
 - Ed Sheeran
 - Alan Jackson
 - Post Malone
 - August:
 - Foo Fighters
 - TSU John Merritt Class
- Bridgestone Arena has several large events including the SEC Men's Basketball tournament, Music City Rodeo, Megan Moroney, the Dove Awards, the Red Clay Strays, and the CMA Awards.
- CoSTAR and Tourism Economics latest hotel forecast for 2026 shows an anticipated hotel room demand increase of 2.3% with rates increasing .8%.
- The 2026 demand forecast improved from the prior forecast in November by 1%. Hotel occupancy is expected to be level with last year as the market continues to battle the increase of hotel supply that will increase 2% in 2026.
- Positive RevPAR in 2026 is an improvement since the two previous years were in the red for the market.
- TravelClick reports hotel booking pace for Nashville to be a range. March is pacing an 8.3% increase, April a 6.9% decrease with shift in Easter from 2024 being a leading cause. May should see an increase due to college graduations across the city. June is pacing at 21%.

Discussion ensued on the following:

- March's change was attributed to Easter being late last year giving conventions more time.
- Clarity that 4-bedroom STR's account for 29% of available units.

- Clarity that the Alan Jackson concert is likely the leading cause of the anticipated June spike.

LeClaire asked Deana Ivey, President & CEO of the NCVC, to give a report from the organization. She provided the following highlights:

- Nashville performed very well in the first half of the fiscal year.
- Nashville's market is strong, but local competition is higher than ever as Nashville sees increase in supply in every area of hospitality.
- NCVC worked to attract and host events to help during the slower winter months. NCVC was pleased to see the impact these events had:
 - o NCAA basketball games on December 5th and 6th sold out resulting in an 8% YOY increase.
 - o FCS Championship on January 5th at FirstBank Field saw 18,000 visitors.
 - o AU Pro Basketball's second year was a 5-week series at the Musicians Hall of Fame
 - o The 5th Annual Dine Nashville throughout February
 - o Second annual 615 Indie Live February 7th
- GEODIS Park is hosting the U.S. Women's National Team SheBelieves Cup March 1st
- Additional upcoming events:
 - o SEC Men's Tournament in March
 - o Nashville was selected as Japan's National Team Training Camp for the FIFA World Cup starting in June
 - o July 4th will be two nights with several stages
- Ivey praised the work of the hospitality partners across the city.
 - o NCVC launched a webpage with discounts to over 100 hotels for residents. The page received 16,500 views in 12 days.
 - Hotels were offering \$99 and \$79 hotel rates.
 - o Hotels donated toiletries and blankets for warming shelters at a moment's notice.
 - o The STR community stepped up with Airbnb.org in partnership with the United Way of Greater Nashville providing free housing for 500 families, 901 residents and 149 pets during the winter storm. VRBO also offered discounts at their properties.
 - o NCVC partnered with our industry partners, visitors, and Jigsaw to raise money to provide over 4,239 meals from food trucks for warming shelters and meals to stranded neighbors and front-line workers in 7 hard hit Nashville neighborhoods.
 - o Multiple restaurants and attractions offered their space as a warming and charging place and free and discounted meals.
- New Year's Eve had 205,000 attendees and for the 5th consecutive year was broadcasted nationally on CBS and streamed on Paramount+.
 - o It drew 5.3M viewers from the prime hour of 11:30 p.m. – 12:3 a.m.
 - o It is estimated visitors spent \$39M in direct visitor spending.

- It was almost a sell-out in Nashville with 30,456 room nights sold. Nashville saw a 3.5% YOY increase and downtown hotels saw a 1.2% rise in room demand and a 3% increase in room revenue.
- This event generates around \$400 million in advertising – something we simply could not afford to buy.
- This event is partnered with local partners:
 - Sober Space / Cumberland Heights – about 300 people
 - Safe Bar / Sexual Assault Center
 - Red Frogs
 - KultureCity – sensitivity bags
 - Ronald McDonald House – Nashville was our charity
- Nashville has recently received recognition:
 - Named a Top Destination for the 15th year in a row
 - US News and World Report – Best Vacations 2026 Rankings Nashville was #6 of U.S. Cities to Visit
 - National YouGov survey ranked Nashville No. 1 Most Favorably Viewed Large City in America

Heather Middleton, Chief Marketing Officer for the NCVC, provided the following Marketing highlights:

- January and February are typically slower months for our partners, and we are trying hard to fill those.
- Dine Nashville is in its 5th year and this year featured 18 collaborations with most selling out.
- NCVC offered specials and discounts throughout the city throughout the month of February.
- NCVC supported all of this with PR advertising, including drive market radio spots, USA Today, digital style, blueprint, digital and a meta campaign.
- On February 7th NCVC hosted the second annual 615 Indie Live event to celebrate independent music venues and local artists. This is a partnership with the Music Venue Alliance Nashville and supports independent live music venues.
- This event featured 15 venues and over 60 Nashville artists from diverse genres. It had over 2,000 attendees with 20% visiting from out of state.
- NCVC had a Winter Rocks Campaign. This was to promote everything in January and February. We targeted Dine Nashville, 615 Indie Live, Black History Month, and everything from Opry shows to sporting events and discounts and deals across the city. We promoted over 31 special offers for visitors during the two-month period.
- The NCVC PR team hosted two group press trips in February: 6 UK Journalists and 10 writers from the U.S. and Canada. They will welcome 5 journalists from Australia in March and an additional 13 December – February.

A discussion ensued on the following:

- Clarified the number of attendees at 615 Indie Live were tickets sold. A portion of ticket sales goes to support the Music Venue Alliance.

Adrienne Siemers, Chief Sales Officer for the NCVC, provided the following sales highlights:

- The NCVC sales team exceeded definite room night goal for end of the quarter. They are on pace to meet / exceed assigned fiscal year goals in June.
- The NCVC Sales team hosted the Certified Meeting Planner breakfast at PCMA in January with over 250 meeting planners and industry professionals in attendance. Multi-platinum Nashville artist Niko Moon performed.
- The NCVC Sales team hosted a VIP reception at the American Bus Association with chart-topping hit writers Matt and Josh Jenkins
- The NCVC Sales team will host around 40 travel trade and meeting planner clients at the Opry at Carnegie Hall in March in New York City. They will be hosting Atlanta sales blitz for meeting professionals in April with 15 members attending with the NCVC sales team.
- The NCVC sales team is actively booking events at the new Nissan Stadium.

Discussion ensued on the following:

- Clarity the new stadium is expected to open in 2027.

Deana Ivey, on behalf of Marie Sueing, Chief Engagement Office for the NCVC, provided the following report highlights:

- NCVC's Chart Climbers 2nd cohort will kick off their first session in January. There are 15 businesses participating, and NCVC is grateful to have Amazon as a returning sponsor of the program.
- NCVC is thrilled that the United State Civil Rights Trail has expanded to include 6 new historic sites across 4 states. Two of these sites are in Nashville: The Jefferson Street Sound Museum and the Museum of Christian and Gospel Music. Both sites highlight the connection of music and civil rights. Marie Suing will be serving on the USCRT Board.
- The NCVC was awarded the outstanding service award during the Urban League of Middle Tennessee's 58th annual Equal Opportunity Day. This award is a result of long-standing exemplary work partnership with the CBC in support of the United Urban League Nashville will host three major multicultural conventions in July this year, Zeta Phi Beta Sorority Incorporated the National Bar Association and the National Urban League convention.

Andrea Arnold, Chief Public Affairs Officer for the NCVC, provided the following report highlights:

- Safety has always been a priority for the NCVC and our partners. NCVC has always encouraged businesses to have a relationship with their district commander like we do. We recently hosted a meeting with Commander Bearden to give an update on their initiatives.
- He shared violent offenses were down by 9.3%, property offenses were down 4.8% and an overall reduction in crime by 5.7% compared to 2024. This is largely due to the Downtown Entertainment Unit.

LeClaire announced the next meeting will be May 12, 2026.

LeClaire called for any additional business, there is none.

LeClaire shared this concludes our tourism commission business. Starting in 2026, Metro Council passed ordinance BL2025-846 (now reflected in Metro Code as 2.177.070). This ordinance requires the district management corporation to report no less than quarterly to the Commission, “on financial sources and uses of all fees and assessments, including funds resulting from management, operation, or other use of Metro public assets, including but not limited to Metro parking garages.” The Commission’s duty is to listen to the report and ask any pertinent questions members might have. There is no requirement for an action by the Commission related to the report, and the Commission has no additional oversight over the corporation.

Tom Turner, President and CEO of Nashville Downtown Partnership, provided the following report:

- Report and highlights focused on the Nashville District Management Corporation.
- Downtown boundary given by the Nashville Planning Department is inside the interstate loop and south of Jefferson Street – about 2 square miles.
 - o Inside the boundary there are:
 - 6,000 business owners
 - 22,000 residents
 - 88,000 employees
 - Serves 2 million regional residents
- Downtown alone on a weekday is the 7th largest city in Tennessee.
- It is the 3rd biggest city on weekends, just behind Memphis and the rest of Nashville.
- This area generates 12% of property taxes for the entire county.
- 2025 revenue from fees and assessments paid by property and business owners should be about \$4M in assessments within the C-BID and just under \$1M within the G-Bid. Assessments are based on property values and fees are on certain retail transactions that exclude liquor by the drink, hotel tax, long-term parking, tickets sales, and newspaper sales. This is not exact because the audit is not complete.
- He shared the various services they offer to businesses and residents to keep downtown clean and safe.

- PwC and ULI ranked Nashville in the top 10 for 11 years running in emerging trends in real estate.
- 83 new businesses opened in downtown in 2025 with 70% local.
- Office vacancies are at 15%, which is the lowest among peer cities.
- He shared some of the programming they do for residents and employees whether it's Work Perks or programming at the parks.

Discussion ensued on the following:

- Clarified they took over Walk of Fame Park in October of 2024. There are noticeable differences in upkeep and activation.
- Clarified they report calendar year.

Higgins motioned to adjourn the meeting at 9:11 a.m.; Glen seconded; the motion passed unanimously.