



WELCOME

THE PLANNING SESSION WILL BEGIN AT 11:15 a.m.

EXPLORE
ASHEVILLE

POWERED BY

Buncombe County Tourism
Development Authority



CALL TO ORDER

Brenda Durden
BCTDA | Chair

PLANS FOR TODAY

Chair Brenda Durden

MORNING

11:15am – 11:45am || Welcome & Introductions

11:45am – 12:00pm || *Lunch is served

12:00pm – 12:45pm || Resident Sentiment Workshop

12:45pm – 1:00pm || *Break

1:00pm -1:35pm || Tourism Related Capital Project Investment Strategy

1:35pm – 1:45pm || *Break

1:45pm-2:45pm || One to Three Year Aspirations

2:45pm – 3:00pm || Wrap Up

3:00pm || Adjourn

** NOTE: The livestream will be paused during lunch and breaks throughout the session.*



BCTDA FY26 ANNUAL PLANNING SESSION

11:15 a.m.	Welcome, Introductions, and Icebreaker	Brenda Durden Chris Cavanaugh, Magellan Strategy Group Vic Isley, Explore Asheville
11:45 a.m.	Lunch is Served	
12:00 p.m.	Resident Sentiment Workshop	Chris Davidson, MMGY
12:45 p.m.	Break	
1:00 p.m.	Tourism Related Capital Project Investment Strategy	Chris Cavanaugh, Magellan Strategy Group
1:35 p.m.	Break	
1:45 p.m.	One to Three Year Aspirations	Chris Cavanaugh, Magellan Strategy Group Vic Isley, Explore Asheville
2:45 p.m.	Wrap up	
3:00 p.m.	Adjourn to Reception at The Foundry	

The next joint BCTDA monthly meeting is Wednesday, April 30, 2025, at 9:00 a.m., in the Board Room of Explore Asheville, located at 27 College Place, Asheville.
Please contact Sarah Myers at smyers@ExploreAsheville.com or call 828.333.5831 with questions.

BCTDA Mission Statement

To be a leader in the economic development of Buncombe County by attracting and servicing visitors, generating income, jobs and tax revenues which make the community a better place to live and visit.





WELCOME & INTRODUCTIONS

Brenda Durden
BCTDA | Chair

EXPLORE
ASHEVILLE
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Development Authority

WELCOME BOARD & GUESTS

Chair Brenda Durden

- Welcome board members, TPDF/LIFT committee members, Explore Asheville staff, presenters, and guests who are in attendance
- Let's kick off the session with introductions around the room
Please share your name, organization/title, and board or committee positions (if applicable)
- **ICEBREAKER PROMPT:**
What do you love about living, working or playing in Asheville?

Thank you all for participating!





RECOVERY, REBOUND & REVIVAL

Chris Cavanaugh

Magellan Strategy Group | President

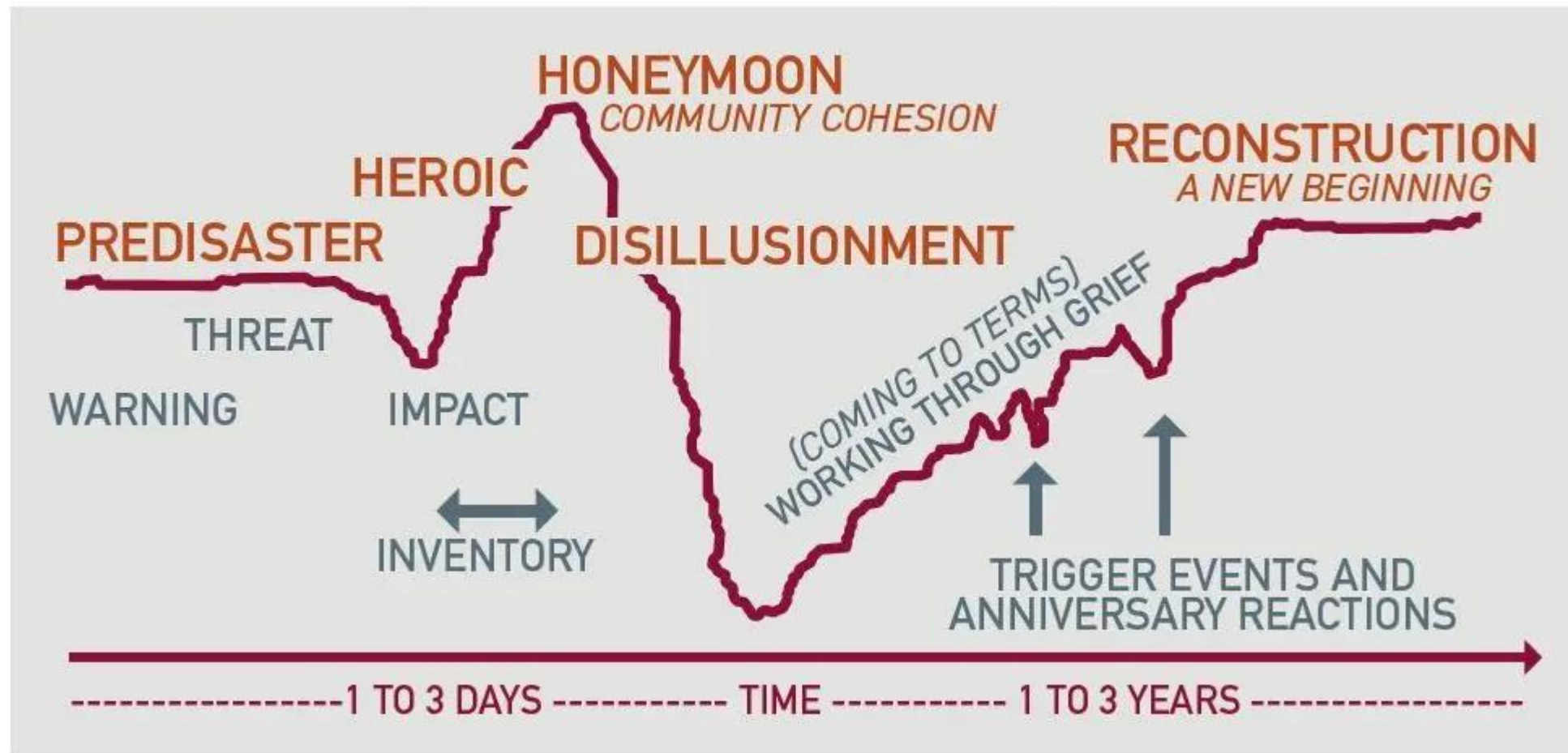
Vic Isley

Explore Asheville | President & CEO

**EXPLORE
ASHEVILLE**
POWERED BY | Buncombe County Tourism
Development Authority

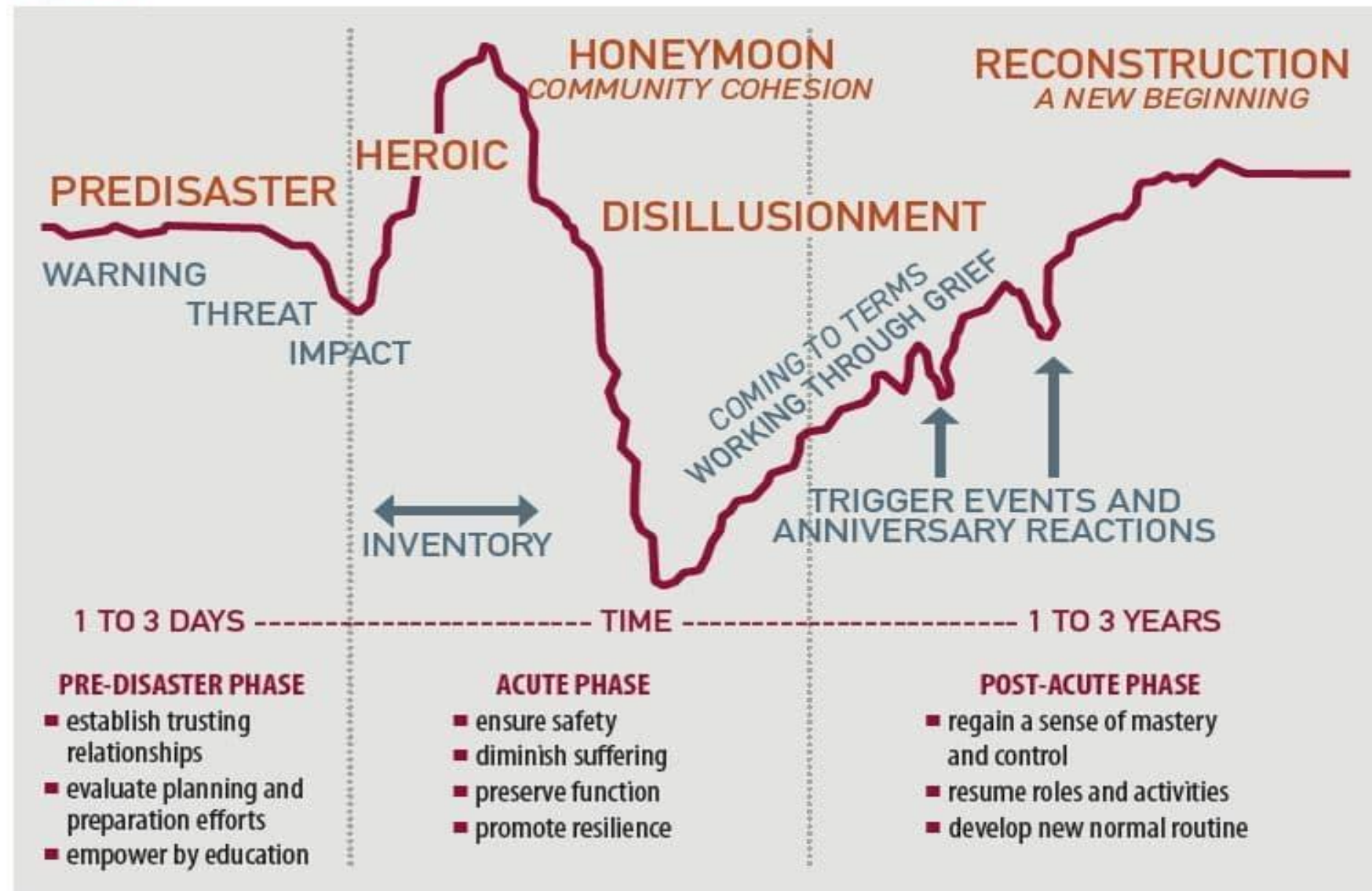
MANAGING OUR EXPECTATIONS

Figure 1. Psychological Phases of Disaster¹⁰



EVOLVING GOALS THROUGH DISASTER PHASES

Figure 2. Changing Goals of Recovery at Different Phases of Disaster¹¹



Explore Asheville

Asheville RISING

ASSESSING THE DAMAGE SIX MONTHS AFTER HELENE



ABCNEWS.COM

QUESTIONS
INPUT
COMMENTS

LUNCH IS SERVED

THE SESSION WILL RESUME IN 15 MINUTES

EXPLORE
ASHEVILLE

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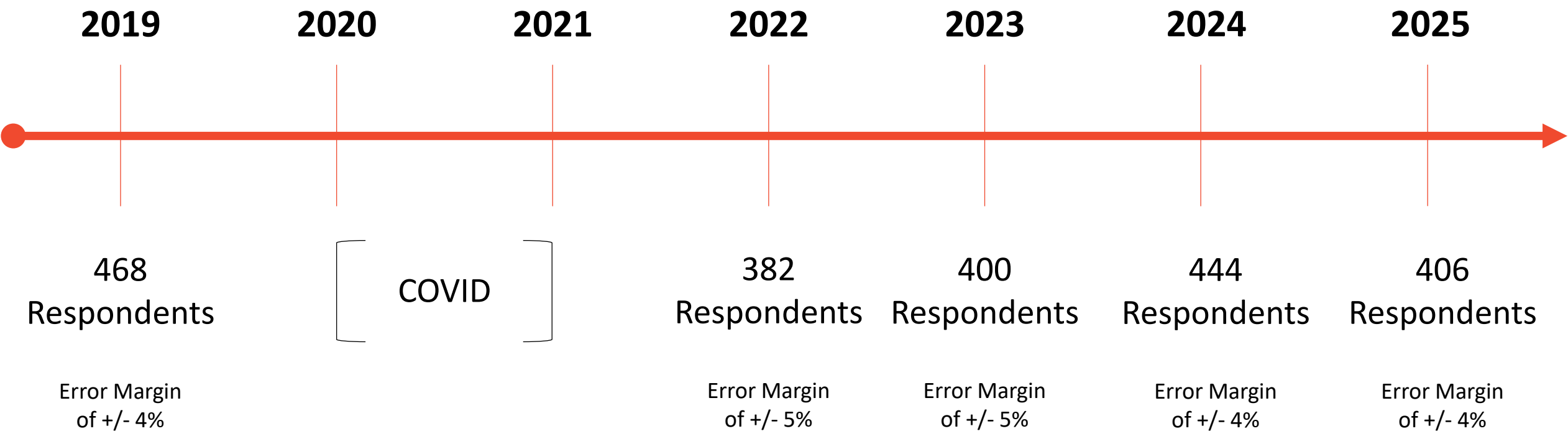
March 2025

Explore Asheville

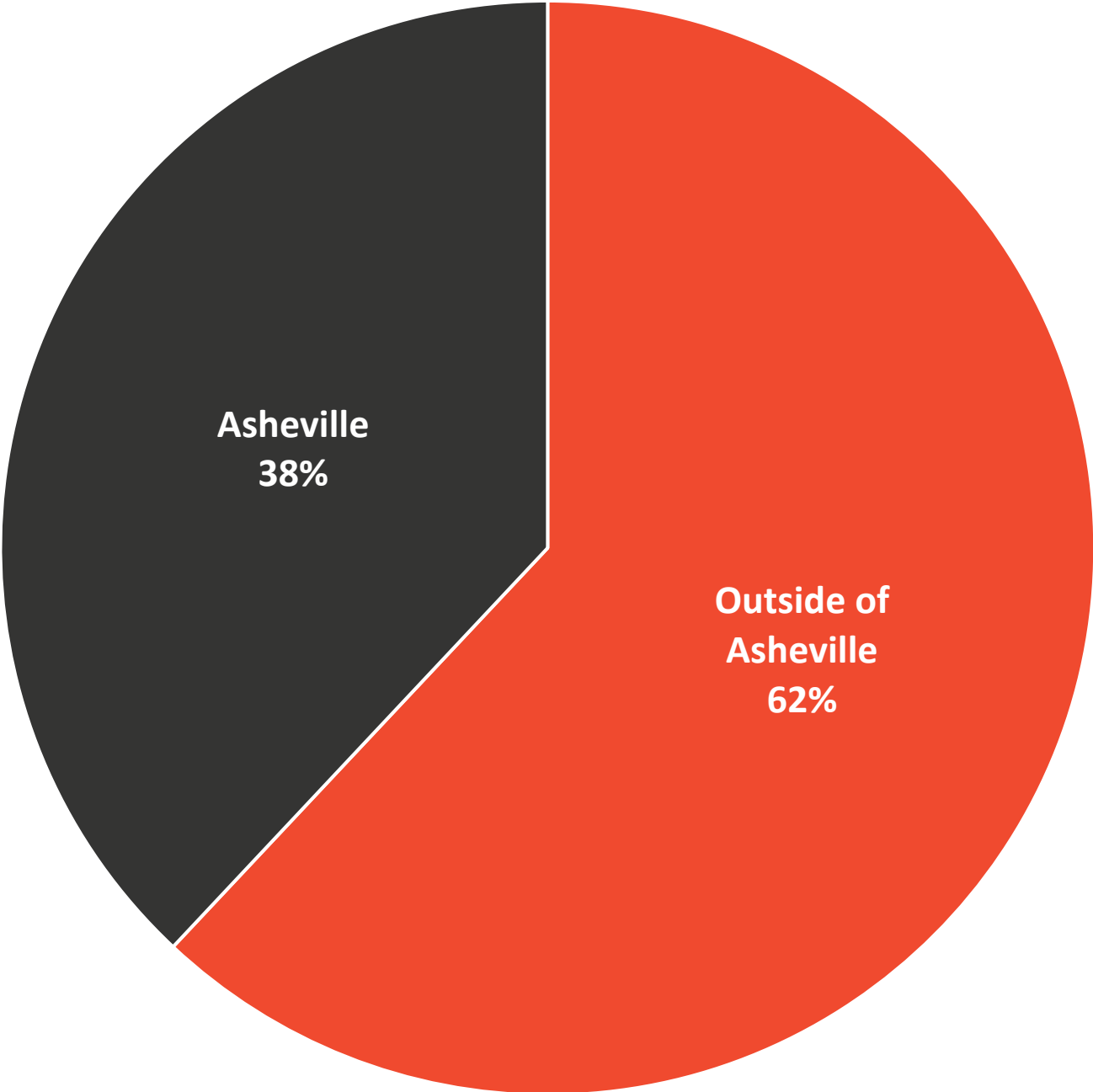
Resident Perspectives on Tourism

- Online panel survey of a representative, random sample of residents of Buncombe County, NC
- Fielded between January 23rd and February 25th, 2025
- N=406 surveys - This sample size yields an error range of +/- 4 percentage points at the 95% level of confidence
- If we were to replicate the study 100 times surveying all residents of Asheville, we would expect the results to be within four (4) percentage points (+/-) 95 times.

EXPLORE ASHEVILLE RESIDENT SENTIMENT SURVEYS



RESPONDENT PROFILE

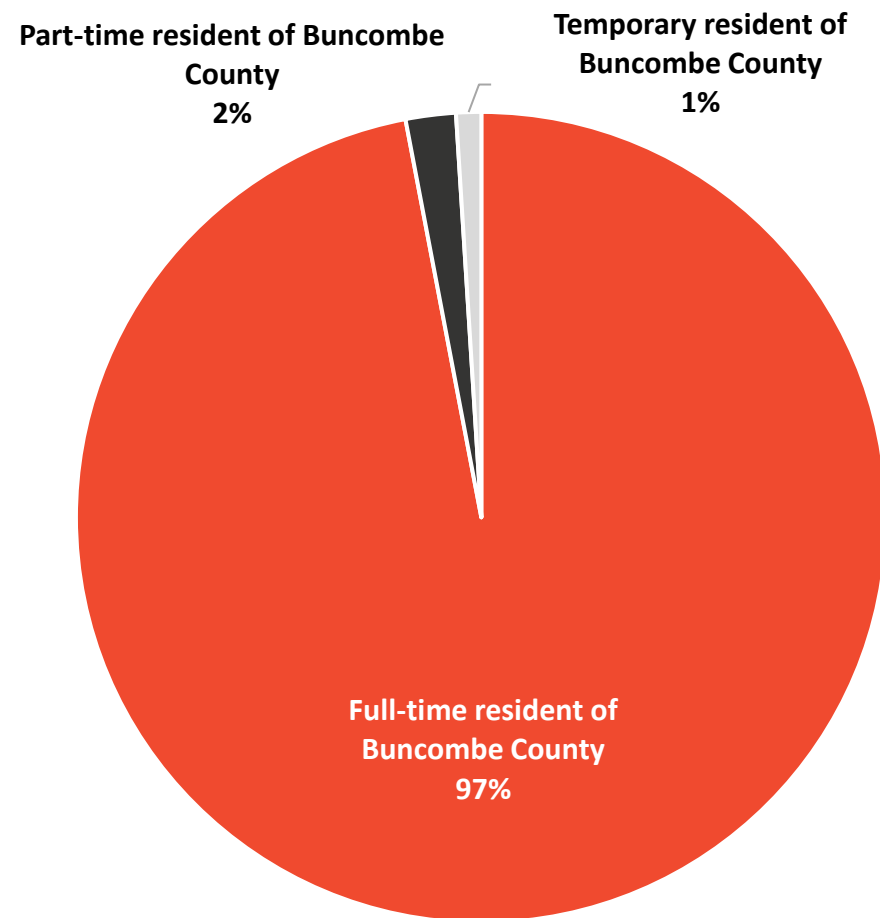


Outside of Asheville Neighborhood	n=250
Western Buncombe County	33%
Eastern Buncombe County	17%
Southern Buncombe County	16%
Northern Buncombe County	14%
Within the Town of Weaverville	8%
Within the Town of Black Mountain	7%
Within the Town of Woodfin	2%
Within the Town of Biltmore Forest	2%
Within the Town of Montreat	0%

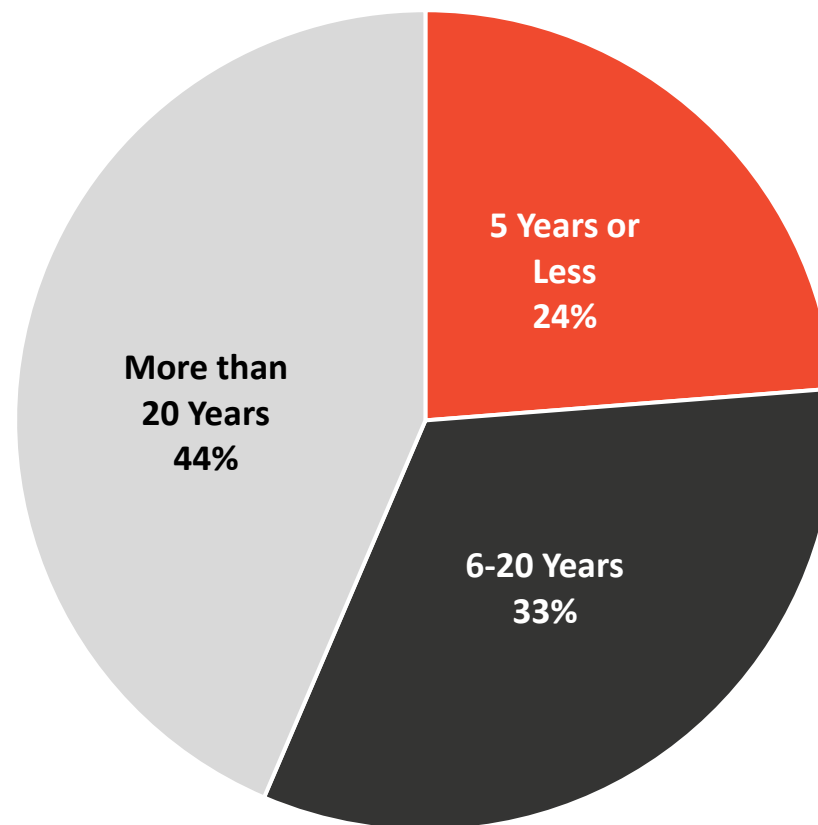
Asheville Neighborhood	n=156
West Asheville	29%
South Asheville	20%
Downtown Asheville	20%
East Asheville	17%
North Asheville	7%
Central Asheville (outside Downtown)	5%

RESPONDENT PROFILE

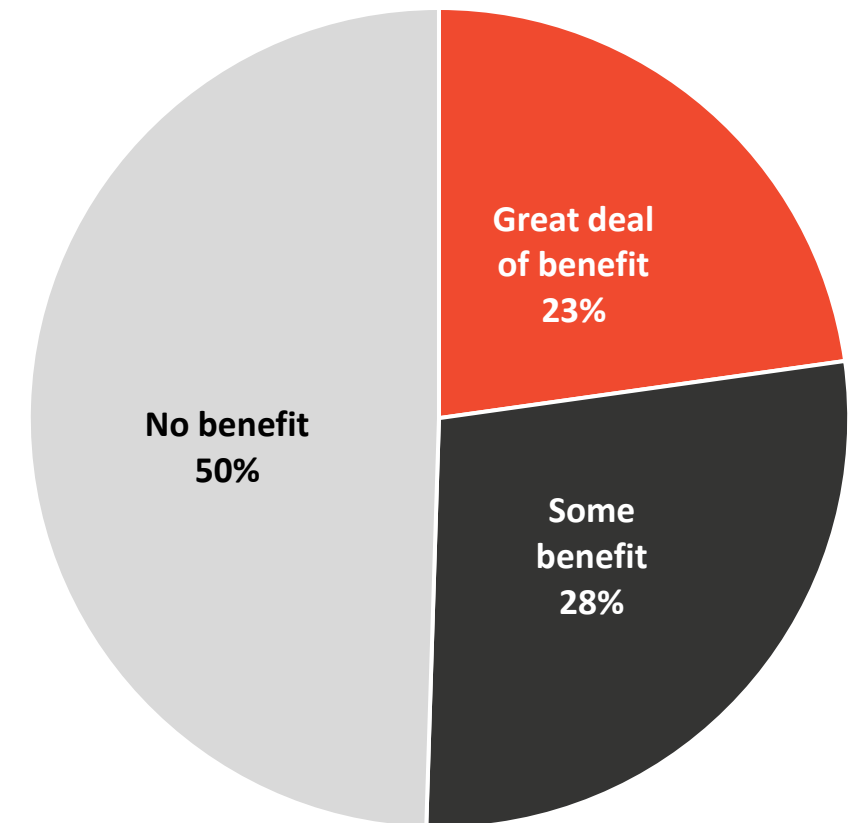
Residency Status



Length of Residency Avg.: 21.8 years



Job Benefits from Tourism

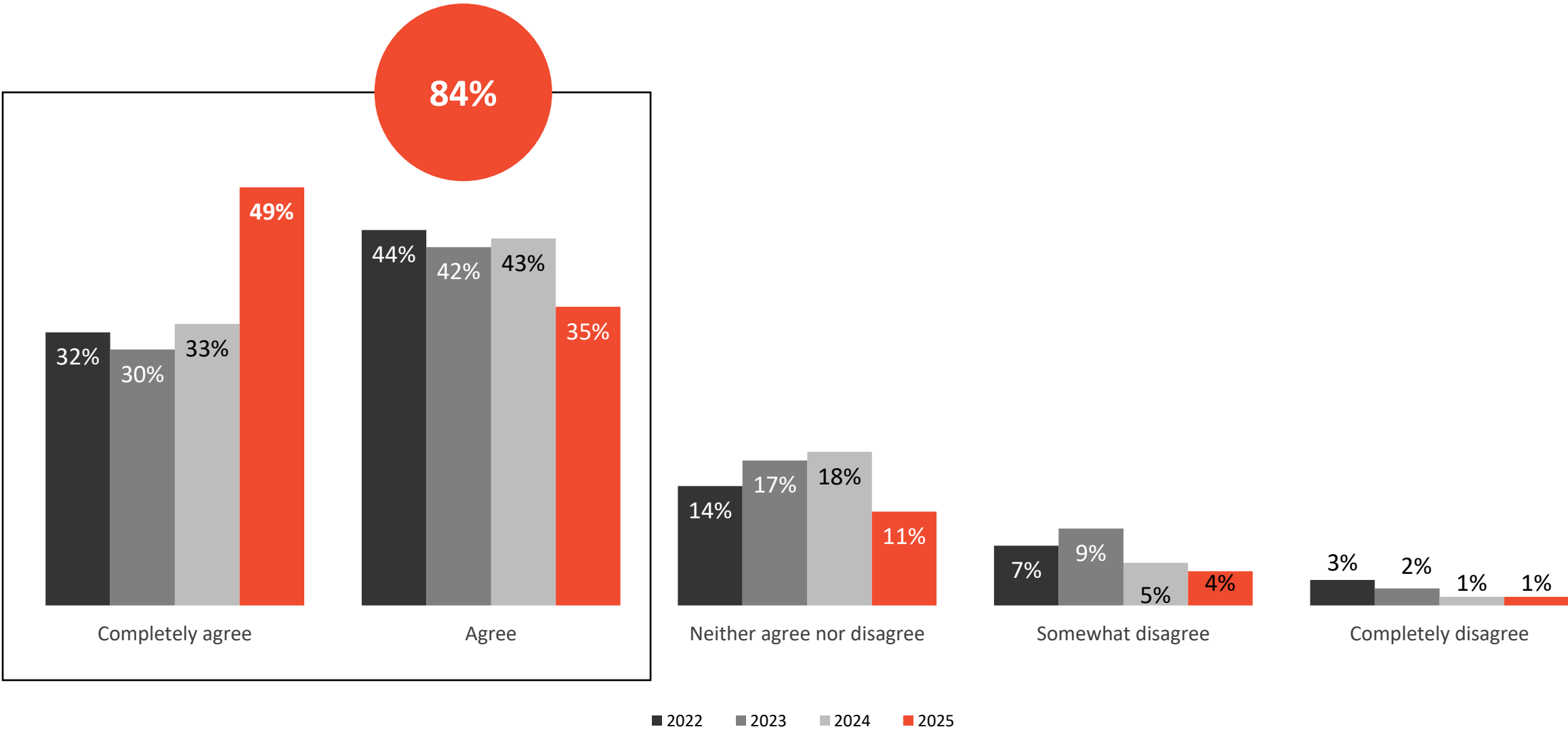


Among those who are employed:
n=220

**In the aftermath of
Hurricane Helene,
community pride
increased.**

In the aftermath of Hurricane Helene, community pride increased.

“I am proud of my community.”



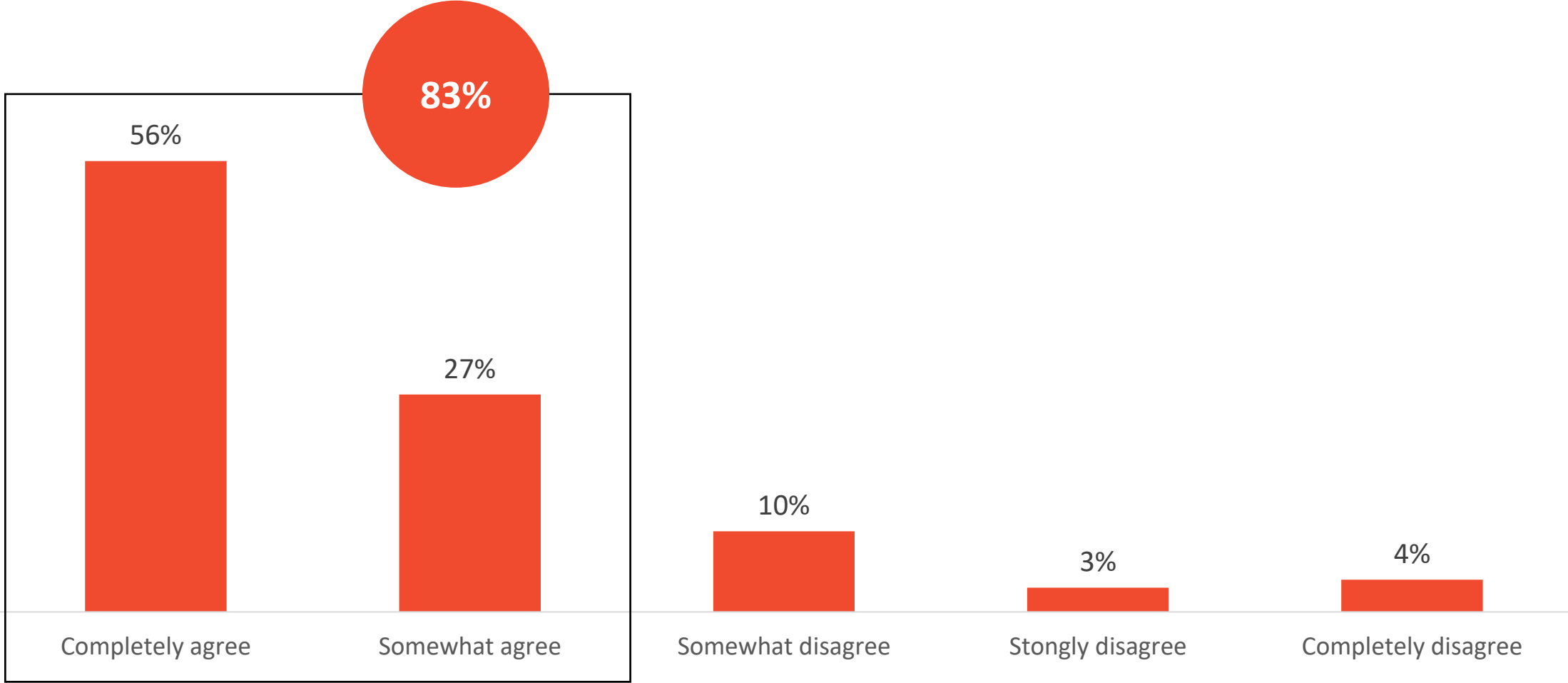
In the aftermath of Hurricane Helene, community pride increased.

Why are you proud of your community?

“I've always been proud of my community here in Asheville because the people here tend to be very open minded and friendly. Businesses collaborate instead of just compete. Now, however, I love it even more after what we all went through with hurricane Helene; everyone came together in a way that I genuinely don't think most communities would. Everyone was helping everyone - friends and strangers alike. Our community is still struggling with it all, but I have no doubt that everyone remaining will build it all back even stronger than before.”

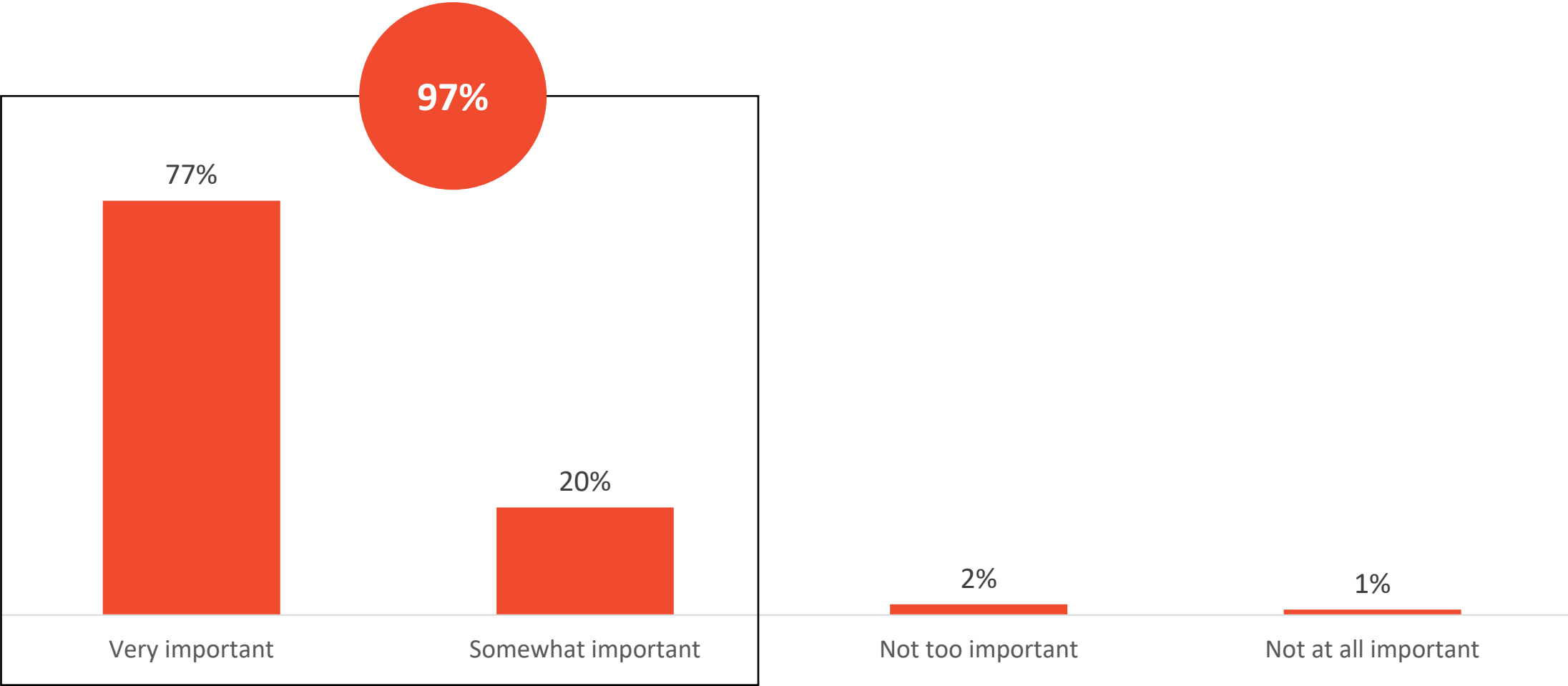
In the aftermath of Hurricane Helene, community pride increased.

Visitors have a positive impact on post-hurricane economic recovery in my community.



In the aftermath of Hurricane Helene, community pride increased.

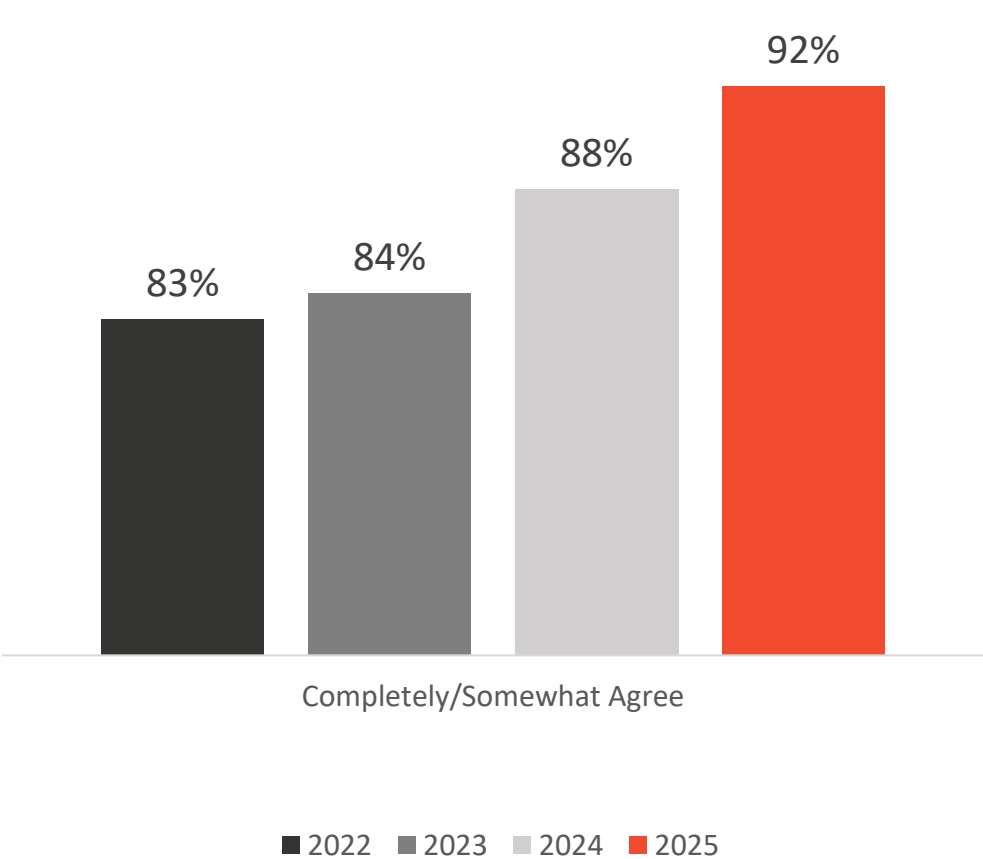
Importance of increasing awareness of post-hurricane recovery efforts



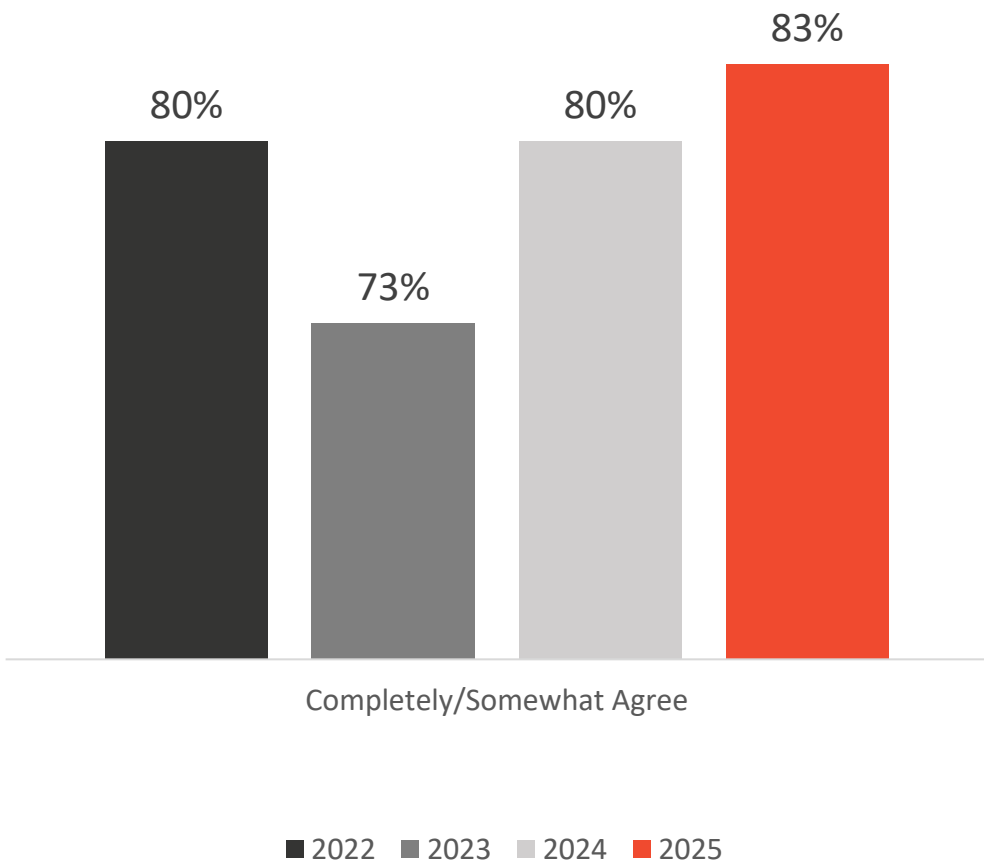
**Residents see the benefits
of tourism and broadly
support promotion of
travel and hospitality.**

Broad support of the travel & hospitality industry

Tourism is beneficial to my community.

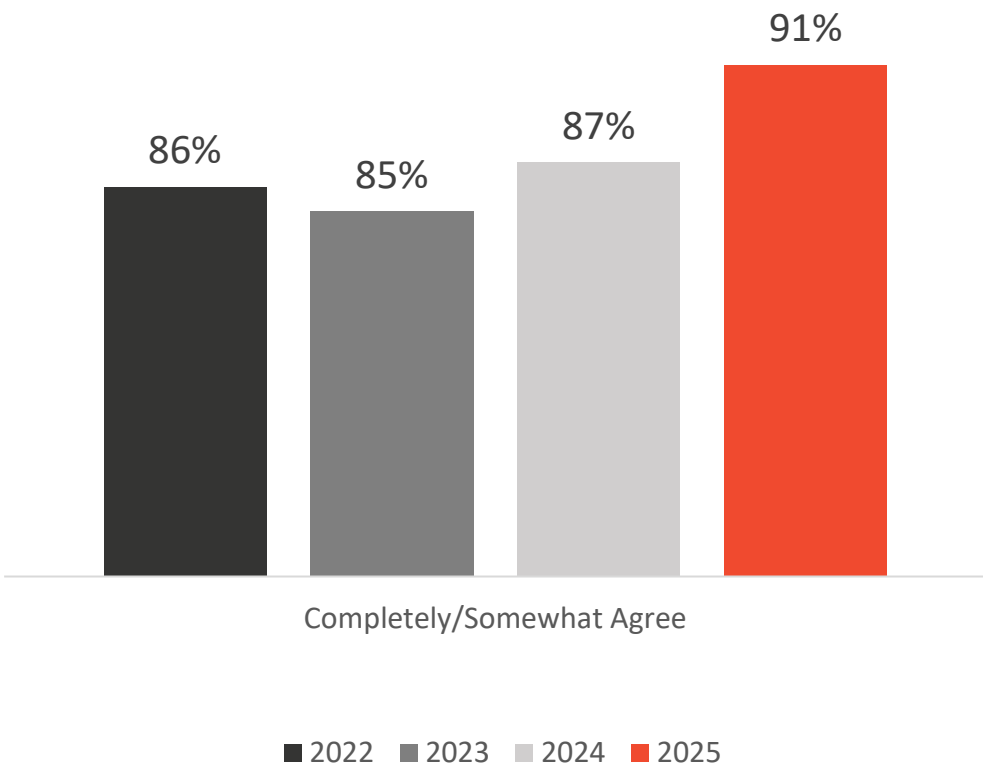


Investment in travel and hospitality promotion via lodging tax collected from overnight visitors fuels the local economy.

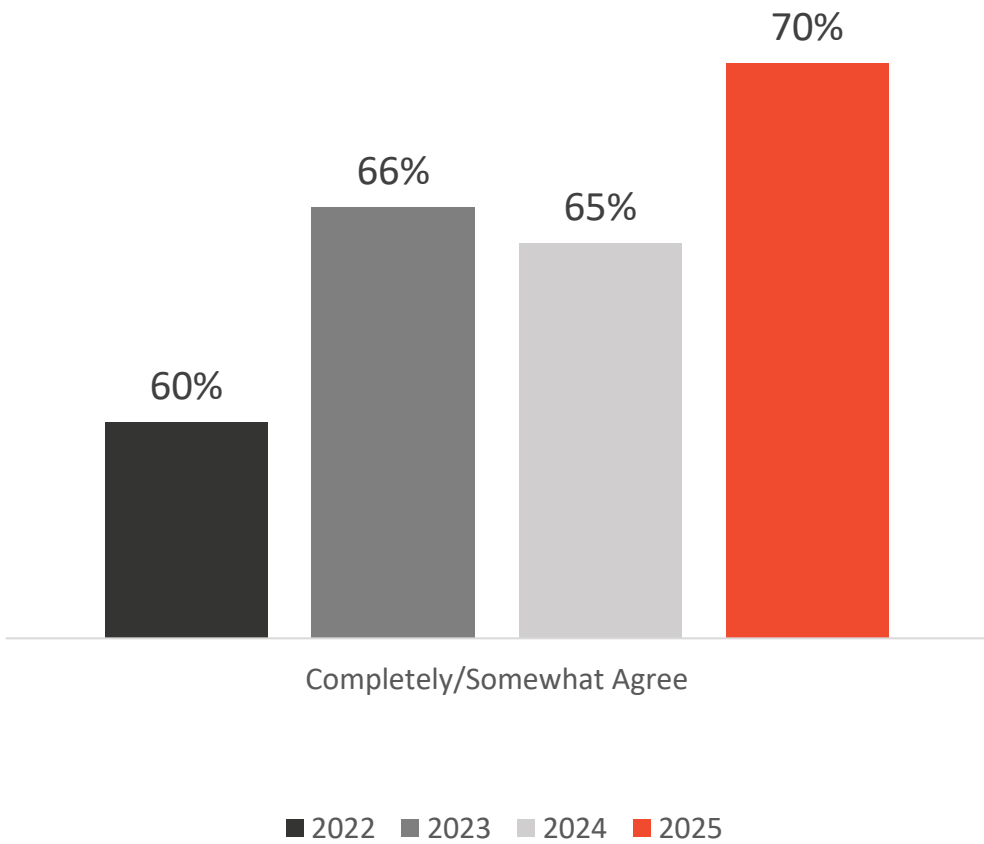


Broad support of the travel & hospitality industry

Travel and hospitality promotion has helped build Asheville’s competitiveness and attracted new businesses to our community.

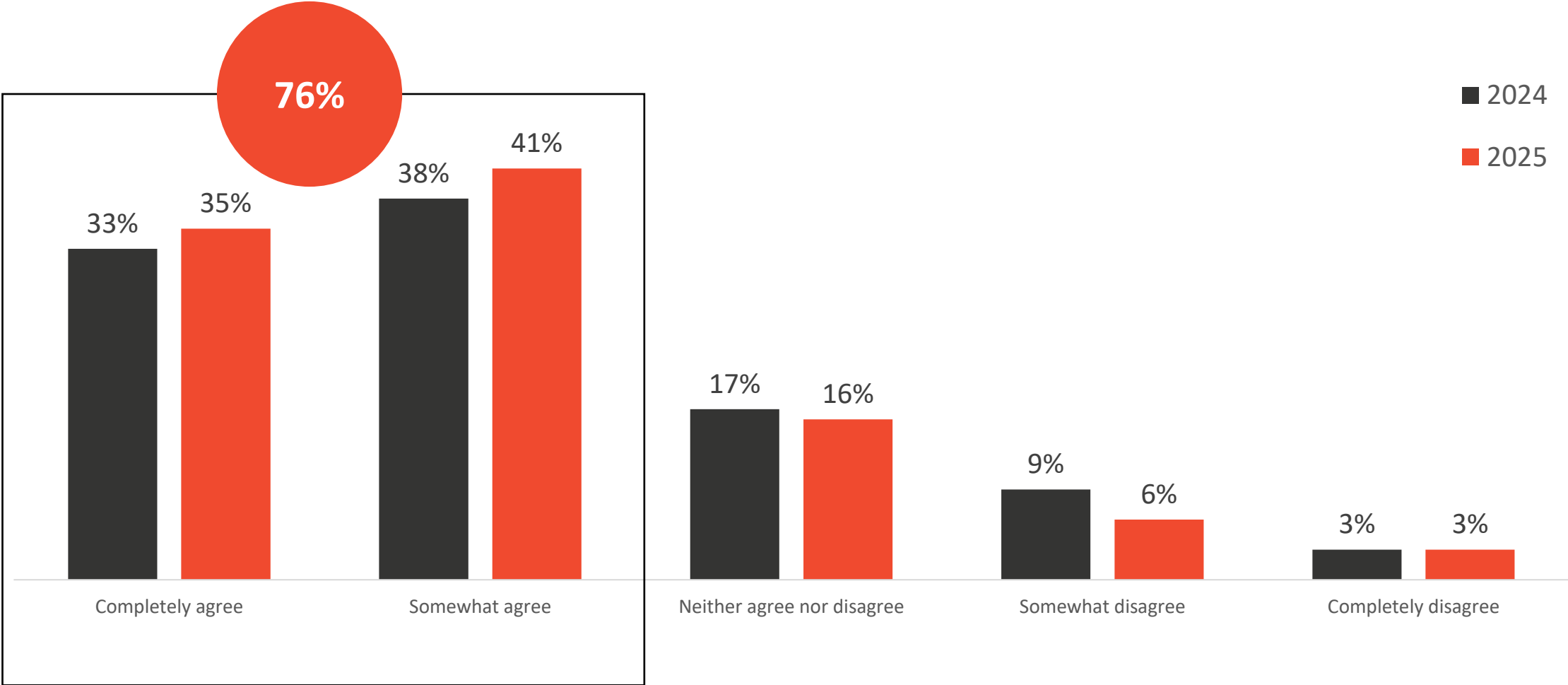


The lodging taxes visitors pay cover the cost for marketing done by my community.



Broad support of the travel & hospitality industry

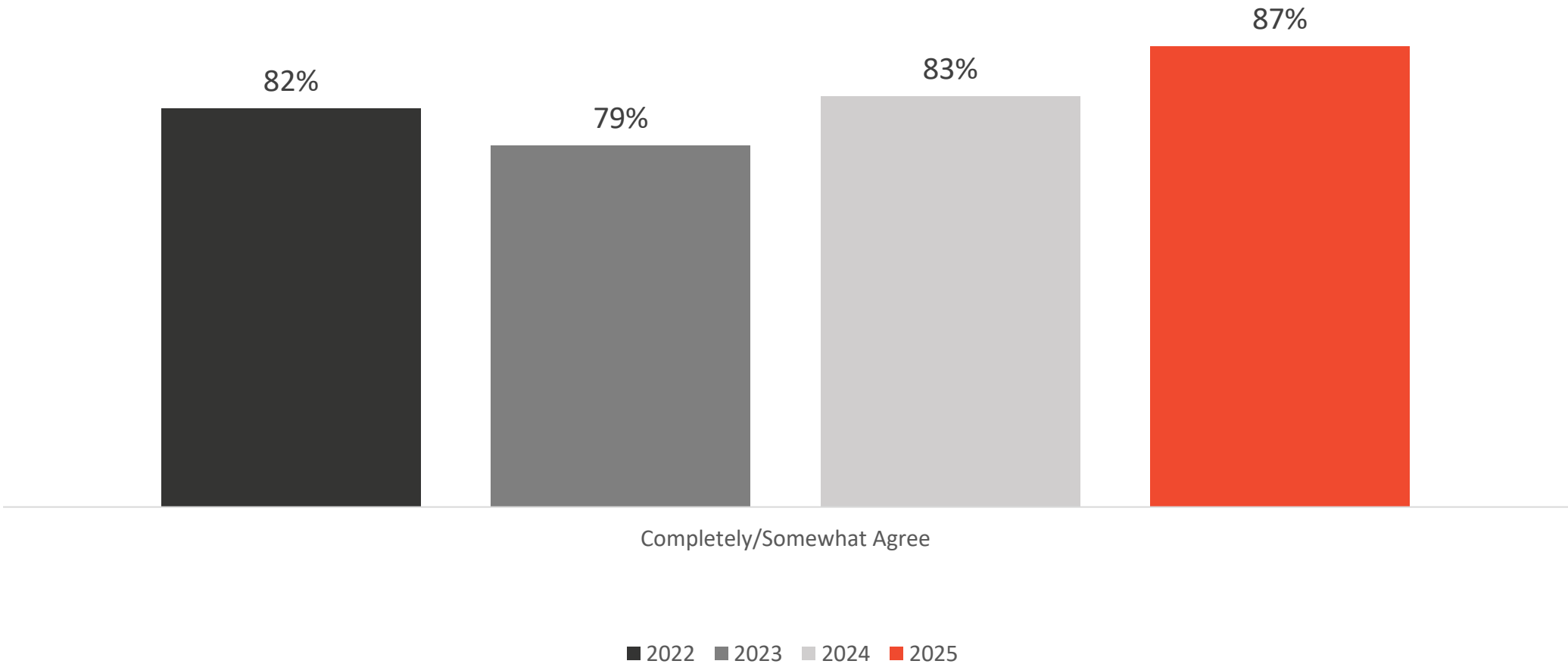
The benefits of travel and tourism to our community outweigh the potential challenges.



**Residents increasingly felt
the personal benefits of
the local travel &
hospitality industry.**

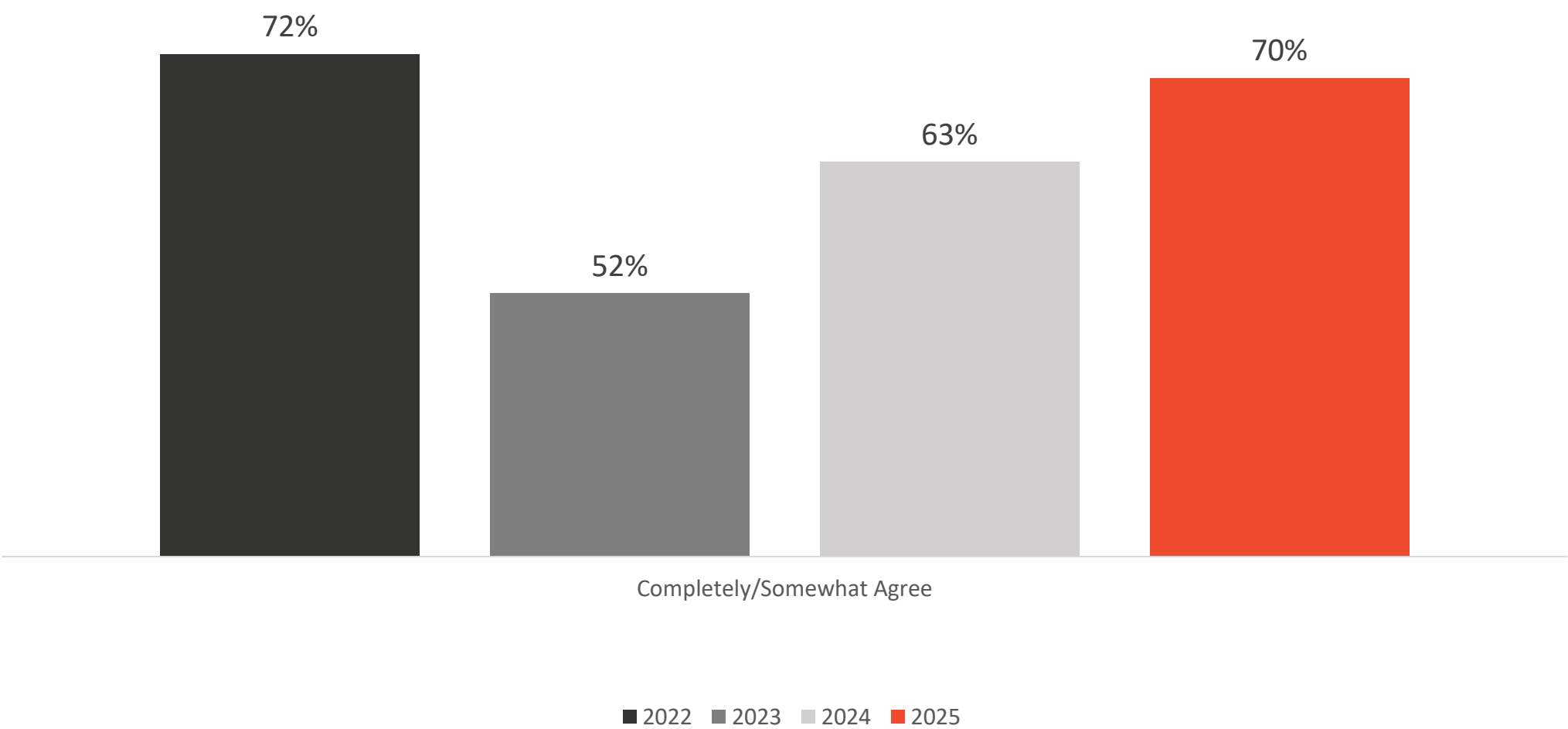
Residents feel the benefits of tourism on a more personal level

Our visitor economy helps support natural and cultural amenities such as parks, greenways, performing arts and museums that residents enjoy.



Residents feel the benefits of tourism on a more personal level

Travel and hospitality positively impacts me and my family.



**Visitors play an important
role in economic recovery.**

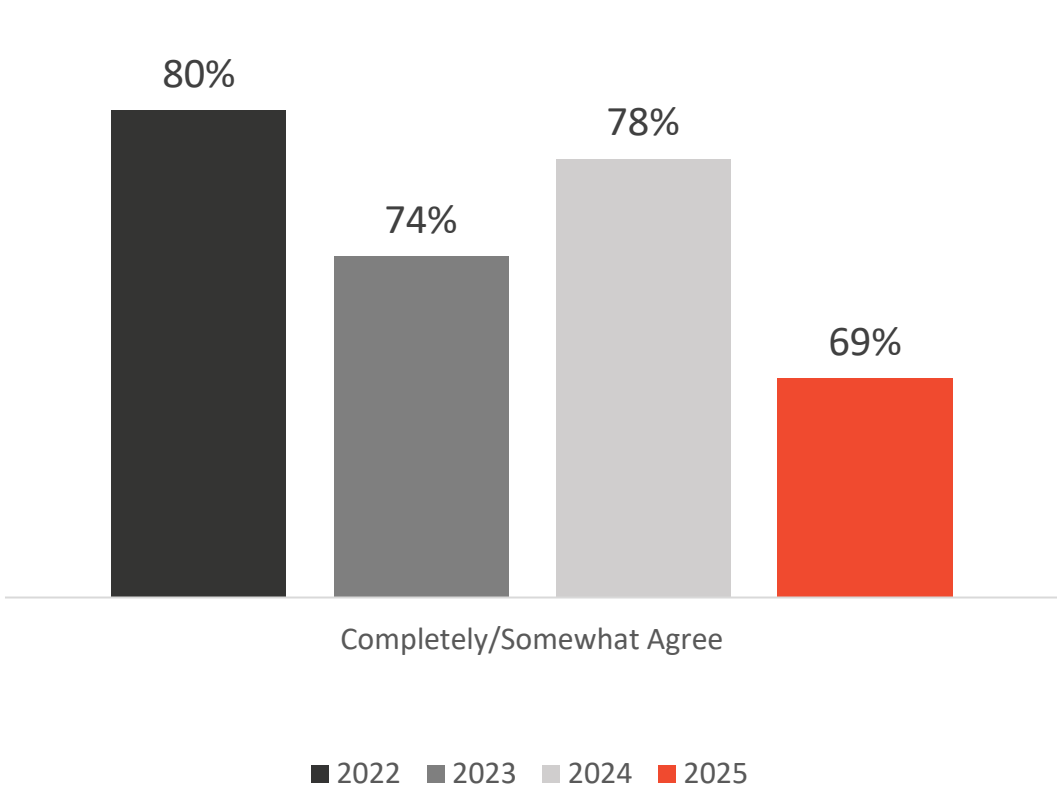
94%

**of Buncombe County residents
believe visitors help support
the number and variety of
independent businesses in in
the community.**

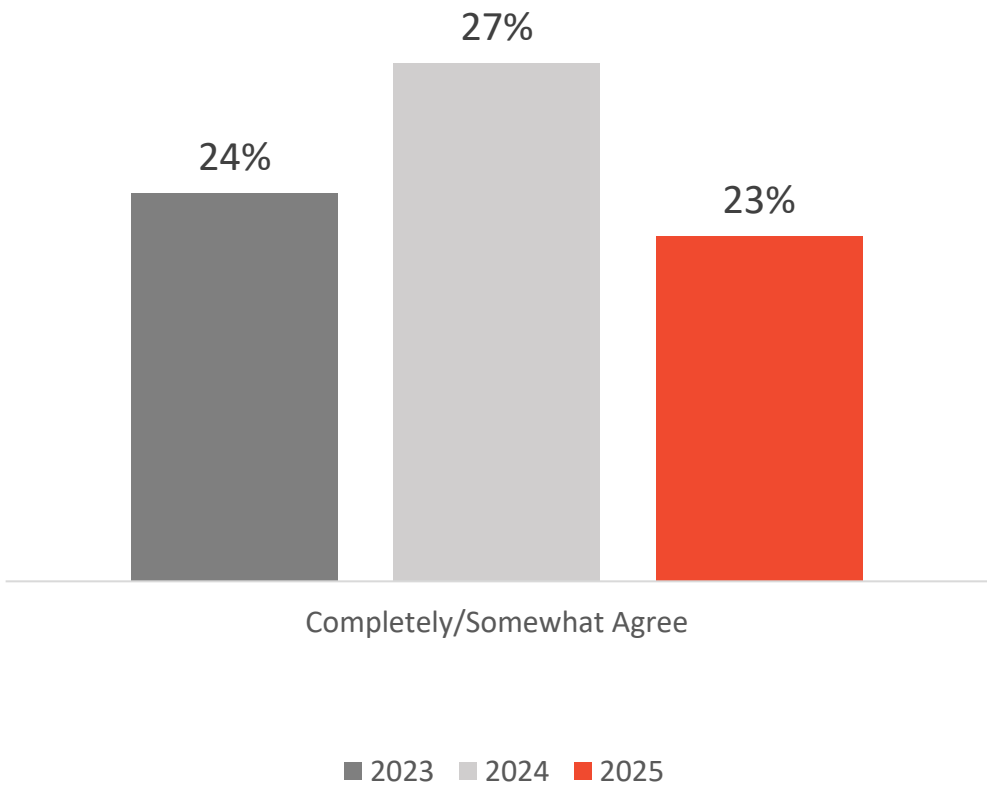


Visitors play an important role in our economic recovery

Enough visitors to support local businesses will continue to come to my community even if destination promotion stops.



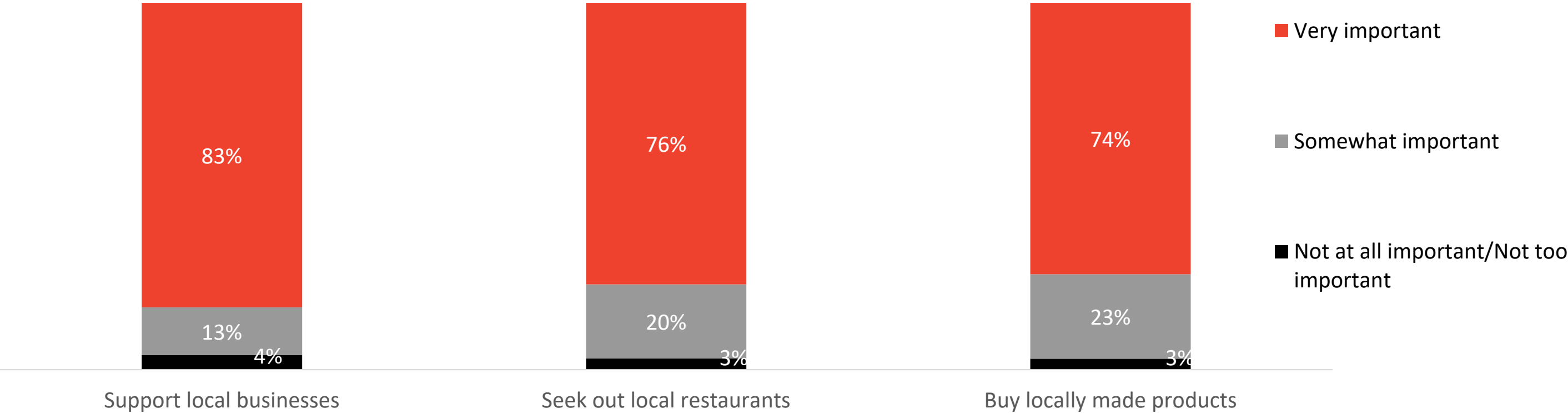
I don't want other people to know about the experiences and amenities here in Asheville and Buncombe County.



**Residents agree that
supporting local
businesses is key for
post-hurricane recovery.**

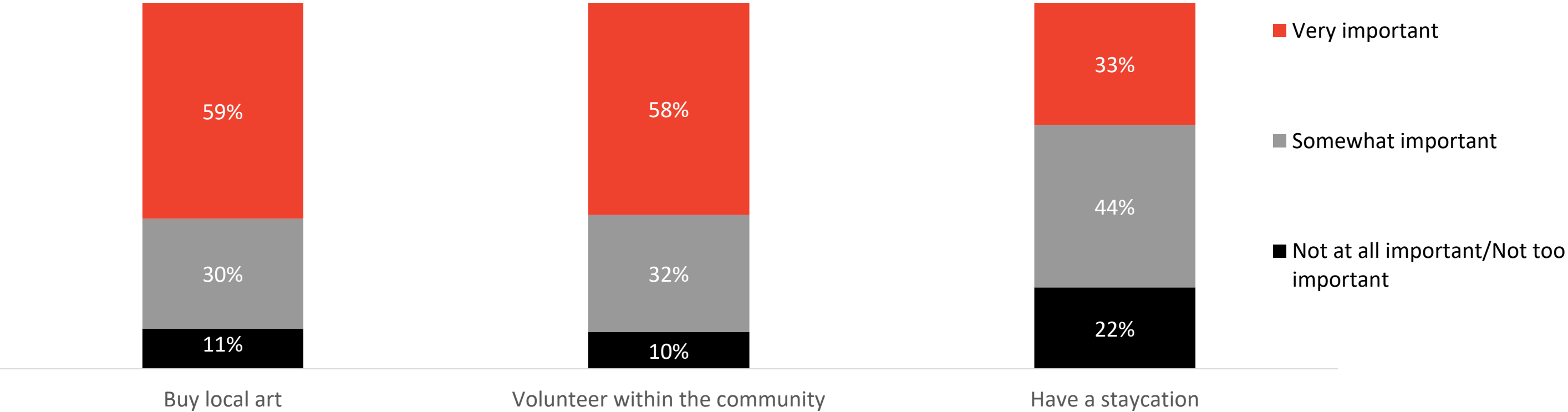
Supporting local businesses is key for post-hurricane recovery.

Q. How important do you believe it is for local residents to participate in the following for post-hurricane recovery in Buncombe County?



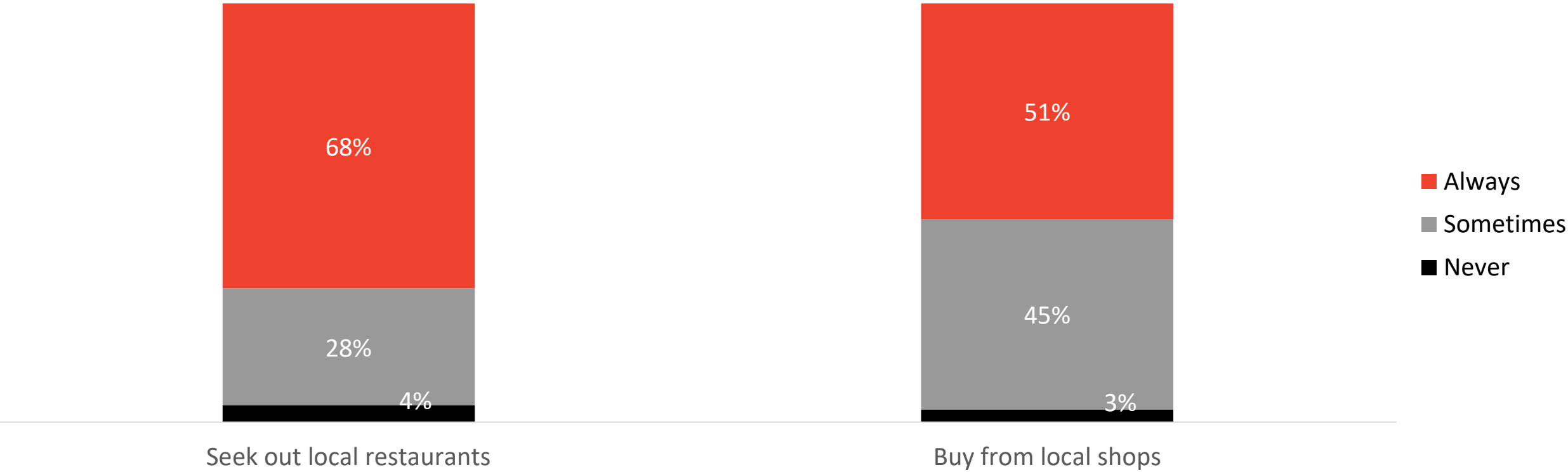
Supporting local businesses is key for post-hurricane recovery.

Q. How important do you believe it is for local residents to participate in the following for post-hurricane recovery in Buncombe County?



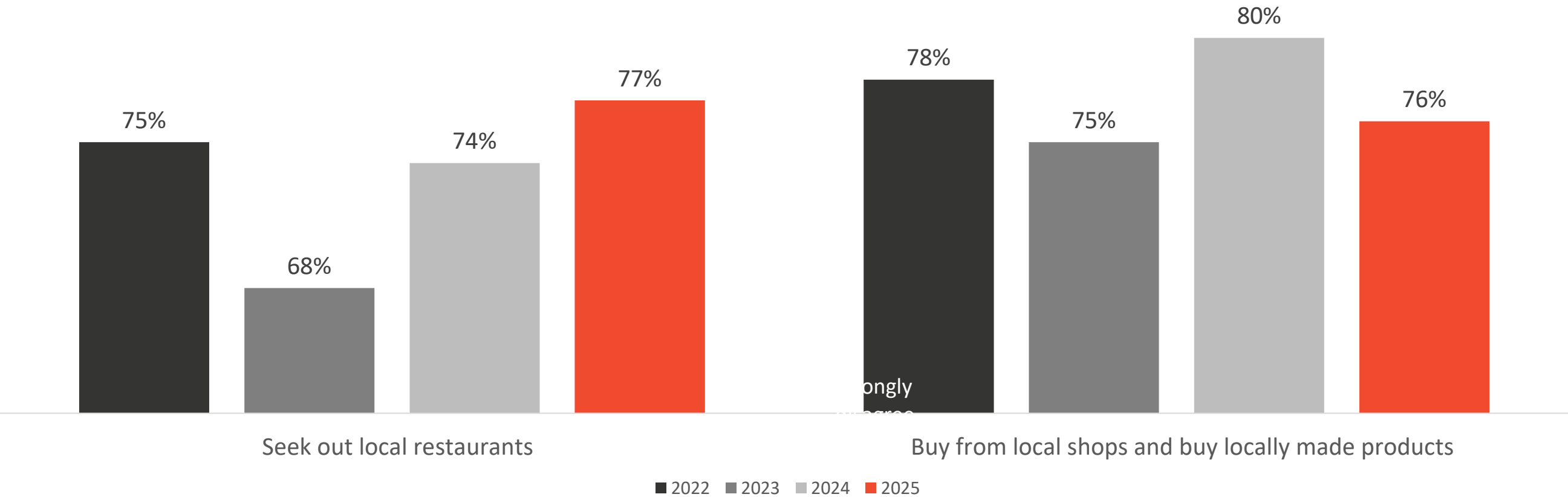
Supporting local businesses is key for post-hurricane recovery.

Q. When traveling for vacation, how often do you do the following?



Supporting local businesses is key for post-hurricane recovery.

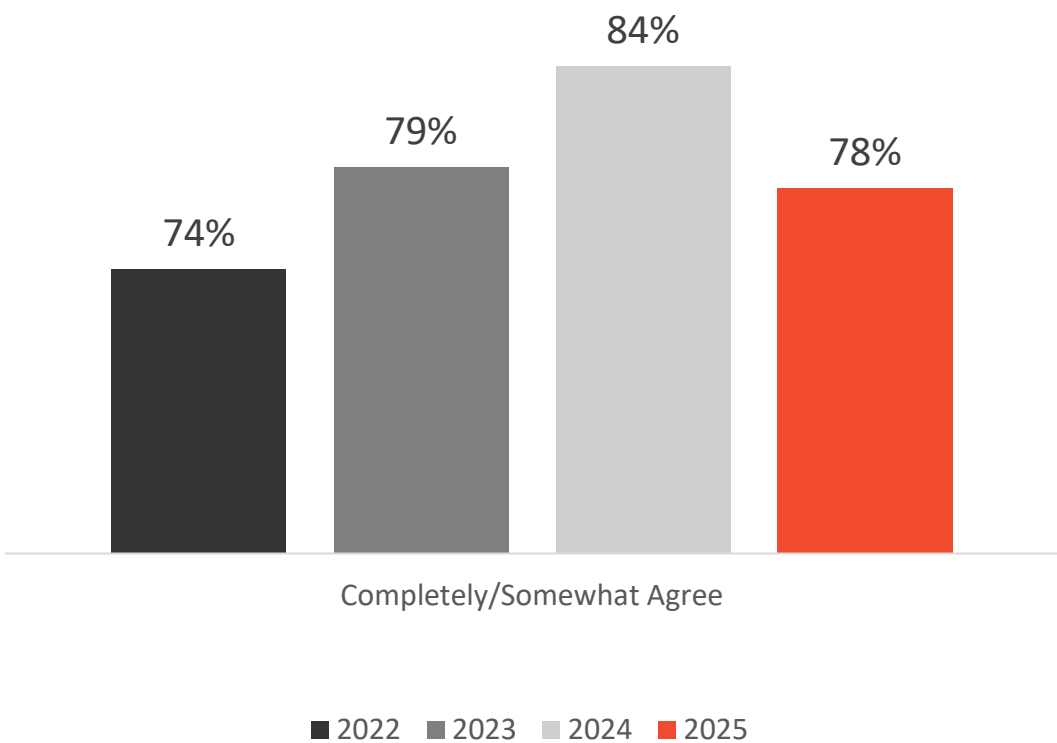
Q. How important do you believe it is for visitors to Buncombe County to do the following when in your community?
(% Very Important)



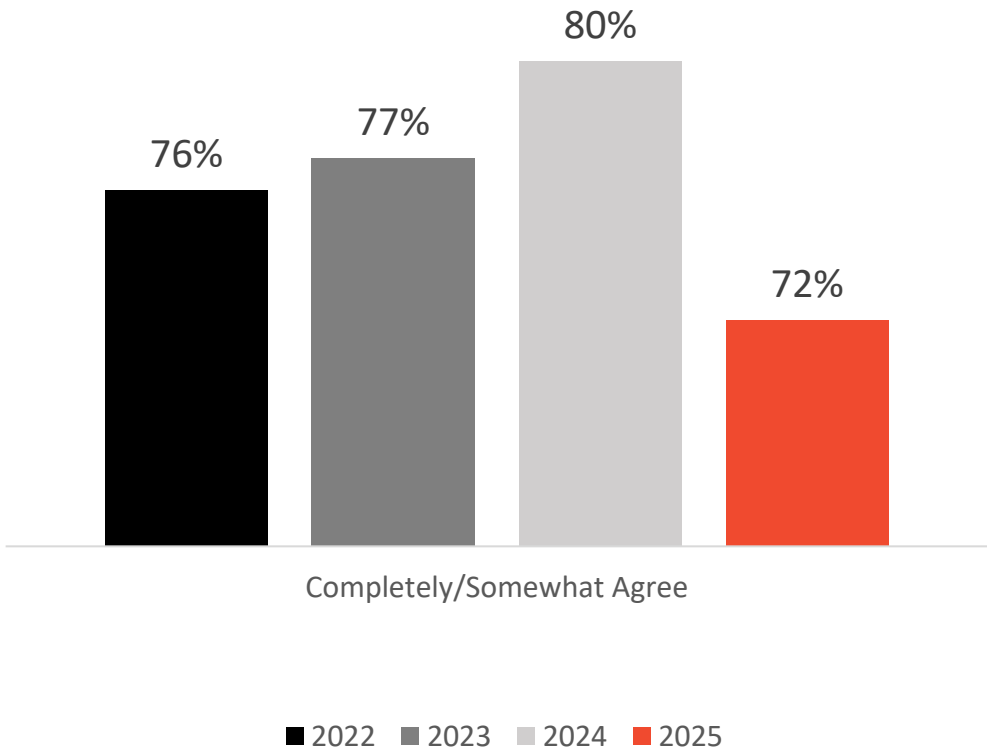
**Concerns lessening about
the negative effects of
tourism.**

Concerns lessening about the negative effects of tourism.

We have traffic congestion due to the number of people visiting the area.

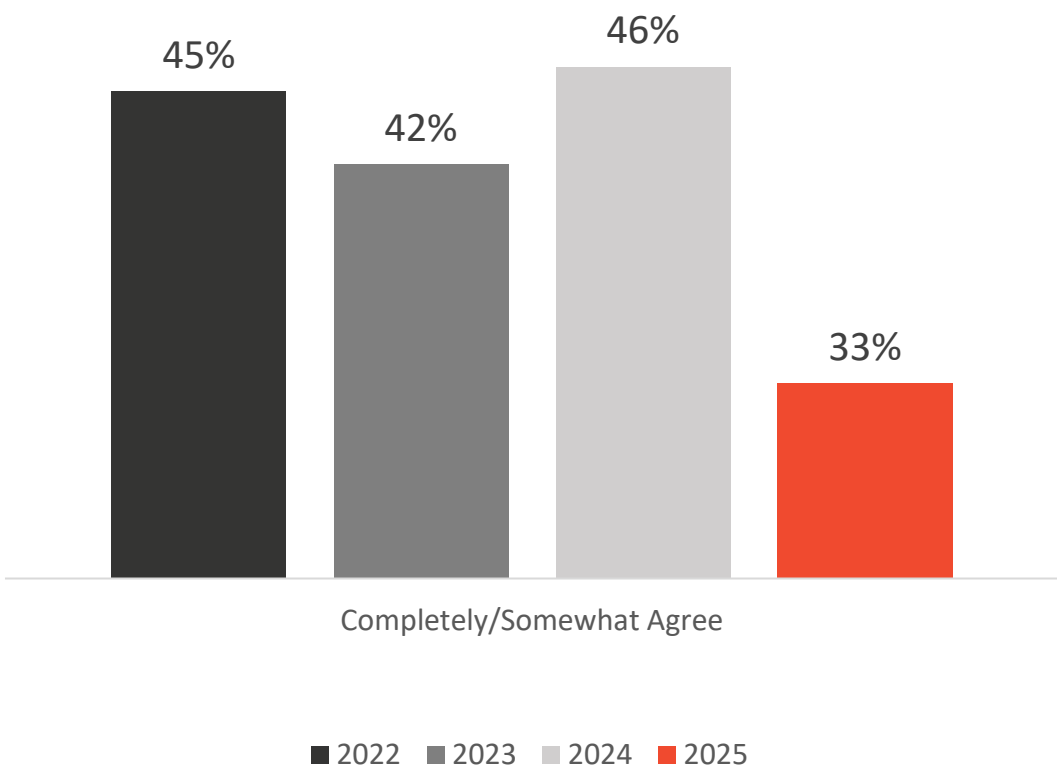


There are parking supply problems because of people visiting the community.

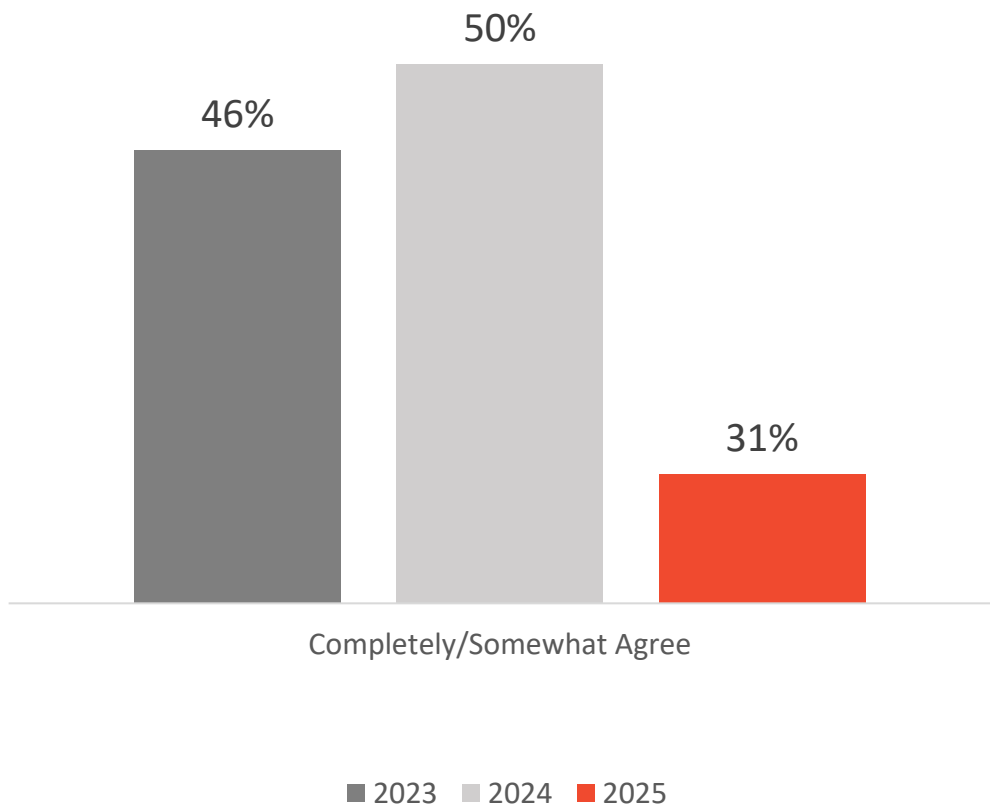


Concerns lessening about the negative effects of tourism.

Visitors prevent me from enjoying community amenities such as restaurants and attractions.

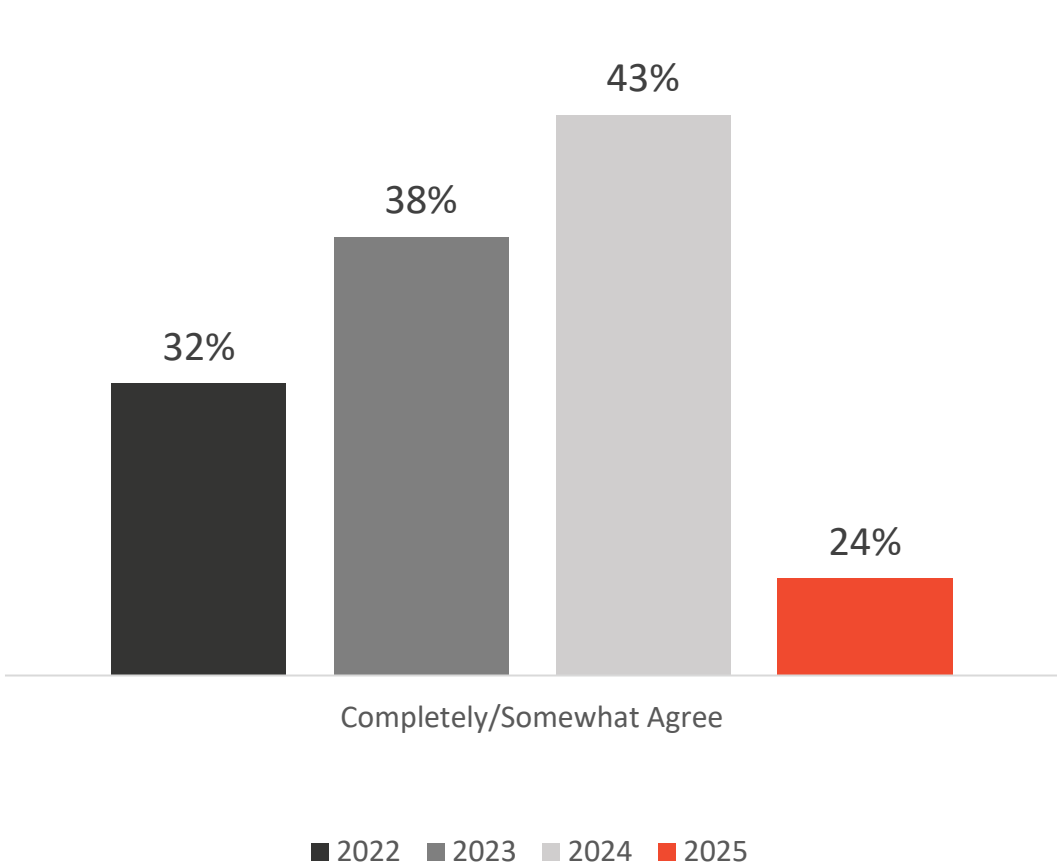


Visitors to my community are directly damaging to the environment.

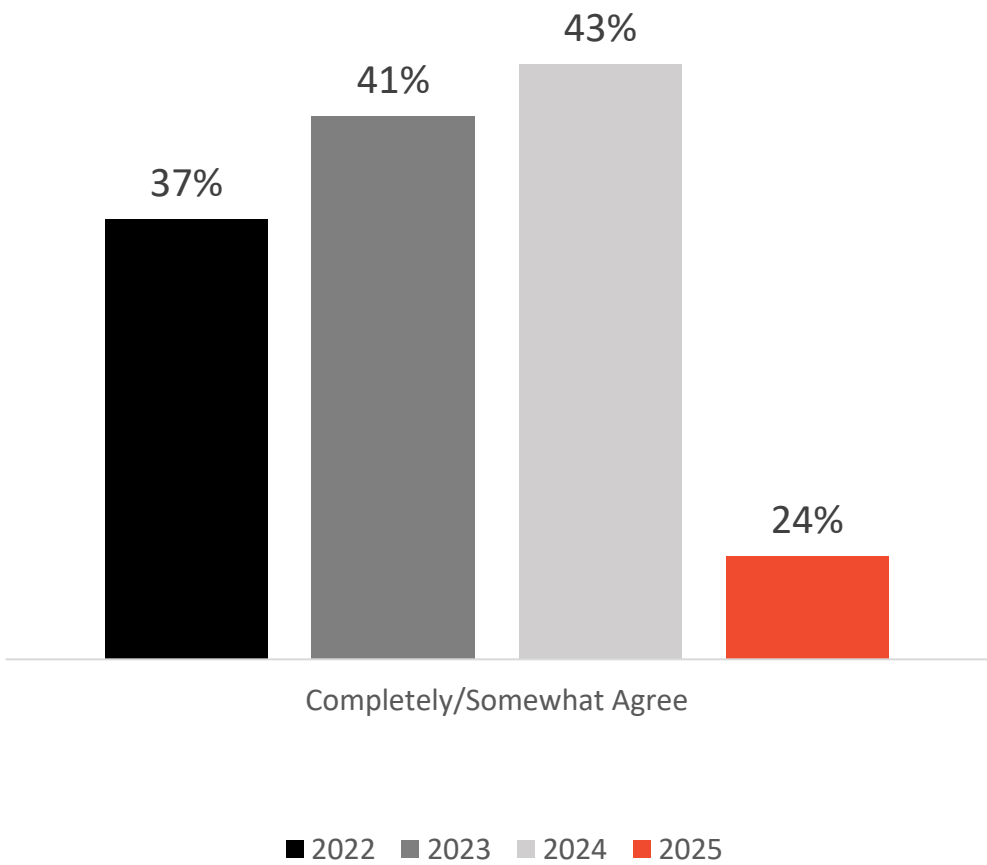


Concerns lessening about the negative effects of tourism.

Visitors detract from the culture and character of our community.



People visiting the area are a drain on city and county resources.



Summary Takeaways

1. In the wake of Hurricane Helene, community pride grew.
2. Residents see the benefits and support promotion of travel and hospitality.
3. The positive impacts of tourism on resident's personal lives were felt more so than previous years.
4. Visitors play an important role in economic recovery.
5. Supporting local businesses is key for post-hurricane recovery.
6. Concern decreased towards negative effects of tourism.



Chris Davidson

EVP, Insights & Strategy CDavidson@MMGYIntel.com

Ashley Adams

Research Manager

AAdams@MMGYIntel.com

RESIDENT PERSPECTIVES ON TRAVEL & HOSPITALITY

DISCUSSION





TOURISM RELATED CAPITAL PROJECT INVESTMENT STRATEGY

Chris Cavanaugh
Magellan Strategy Group | President

TPDF & LIFT FUND CURRENT TIMELINE

April 7, 2025
TPDF Phase I
Application
Opens

October 29, 2025
TPDF Funding
Recommendations
Presented to BCTDA
Board

\$15.6M
Projected
Available

FY25 Q3

FY25Q4

FY26 Q1

FY26 Q2

FY26 Q3

FY26 Q4

FY27 Q1

FY27 Q2

April 2026
LIFT Fund Phase I
Application
Opens

October 2026
LIFT Fund Funding
Recommendations
Presented to
BCTDA Board

\$12.8M
Projected
Available



TPDF MAJOR PROJECT ANALYSIS

- Assess the impacts of the largest TPDF-supported projects since the fund made its first grant awards in 2002.
- Analysis initiated just prior to Helene and recently restarted.
- Zartico geolocation data used to determine guest origin markets, percentage of guests in lodging, and other points of interest visited between from January through August 2024.
- Data from some venue managers also included in the analysis.
- This analysis is still a work in progress as we await additional data.
- Too early to include LIFT fund projects in the analysis.



TPDF MAJOR PROJECT ANALYSIS

Projects* included in the analysis:

<u>Venue</u>	<u>Total Investment</u>
Buncombe County Sports Park	\$10.8 million
ExploreAsheville.com Arena	\$7.3 million
Pack Square Park	\$2.6 million
John B. Lewis Soccer Complex	\$2.4 million
Bob Lewis Ballpark	\$2.0 million
<i>(plus \$1.2 million for lighting funded via county's Enka Recreation Destination application)</i>	
North Carolina Arboretum	\$1.7 million

Not a TPDF venue but included in the analysis: Thomas Wolfe Auditorium

** Projects included have received more than \$1.5 million in TPDF support. Some projects not included are either too recent for analysis or not capable of being analyzed in the same manner, such as wayfinding. Riverfront Destination Development not included at this time due to Helene impacts. Investment amounts are historic since 2002 and may represent a variety of project types at one site.*



TPDF MAJOR PROJECT ANALYSIS

Some caveats about the data:

- A lower percentage of visitors to a venue does not necessarily indicate lower tourism value. Does the project achieve other desired objectives, such as visitor dispersal, attracting a high value audience or market, or filling lodging in off- or shoulder season periods? Does it motivate a visit to the destination or satisfy one by improving the visitor experience?
- Geolocation data also does not account for volume. A venue that attracts 200,000 guests per year with 25% of them being visitors may have a greater economic impact than a venue that attracts 50,000 guests with 50% being visitors.



TOP TEN TPDF-SUPPORTED VENUES OR ATTRACTIONS AS RANKED BY % GUESTS WHO WERE VISITORS, 1/24 – 8/24

TPDF Supported Venue or Attraction*	% of Guests Who Are Visitors
Wortham Theater	56%
Asheville Visitor Center	55%
Grove Arcade	55%
Bob Lewis Ballpark	51%
Orange Peel	51%
Asheville Art Museum	47%
ExploreAsheville.com Arena	46%
Pack Square Park	45%
WNC Nature Center	45%
Thomas Wolfe Auditorium**	44%

* Source: Zartico. Does not include projects that were first awarded funding after 2022 or not completed by 2023.

** Not a TPDF-supported venue.



ExploreAsheville.com Arena

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46%

% From Visitors

Destination Average: 41%

12%

% From 5 County

Destination Average: 12%

42%

% From Buncombe

Destination Average: 47%

70% of visitors were observed at another Downtown point of interest.

Visitors were observed across the county- 17% were observed in East Asheville, 16% at the Biltmore Estate region, 14% at the South region and 13% in South Slope.

52% of visitors were also observed at an accommodation point of interest.

31% of visitors were also observed at a Food point of interest. 42% were observed at an Attraction.

Top Cross-Visited Points of Interest: Grove Arcade, Downtown Hotels, Downtown restaurants/bars, Biltmore Estate, Biltmore Village, Omni Grove Park Inn

Thomas Wolfe Auditorium

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44%

% From Visitors

Destination Average: 41%

13%

% From 5 County

Destination Average: 12%

43%

% From Buncombe

Destination Average: 47%

83% of visitors were observed at another Downtown point of interest. 11% were observed at a South Slope point of interest, 16% at a Biltmore Estate region point of interest.

39% of visitors were also observed at an accommodation point of interest.

38% of visitors were also observed at a Food point of interest. 30% were observed at an Attraction.

Top Cross-Visited Points of Interest: Pack Square Park, Biltmore Estate, Grove Arcade, Omni Grove Park Inn, Downtown hotels, Biltmore Village

FY23 ACTIVITY SUMMARY, EXPLOREASHEVILLE.COM ARENA AND THOMAS WOLFE AUDITORIUM

ExploreAsheville.com Arena & Thomas Wolfe	% Out of Market
All Events Using the Arena	45%
Sporting Events Using the Arena	36%
Concerts Using the Arena	67%
Ticketed Events Only, Using the Arena	56%
All Events Using Thomas Wolfe Auditorium	39%



FY23 ACTIVITY SUMMARY, EXPLOREASHEVILLE.COM ARENA AND THOMAS WOLFE AUDITORIUM

Top 10 Events with Highest Percentage of Out-of-Market Guests	Venue	% Out of Market
Zach Bryan	Arena	87%
Ghost	Arena	81%
Billy Strings	Arena	80%
Boygenius	Arena	80%
Heilung	Wolfe	78%
Ryan Adams	Wolfe	78%
Mt. Joy	Arena	74%
Revivalists	Wolfe	73%
Lindsay Stirling	Wolfe	73%
Marc Rebillet	Wolfe	71%



Buncombe County Sports Complex

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23%

% From Visitors

Destination Average: 41%

11%

% From 5 County

Destination Average: 12%

65%

% From Buncombe

Destination Average: 47%

Regional visitation was split between the West (35%), South (33%) and East (31%) of Asheville.

15% of visitors went to Downtown and the Biltmore Estate region.

38% of visitors were also observed at an accommodation point of interest.

30% of visitors were observed at another Sports related point of interest, further emphasizing that youth sports was the purpose of visit.

Top Cross-Visited Points of Interest: Bob Lew Ballpark, Holiday Inn - Biltmore West, John B. Lewis Soccer Complex, Biltmore Town Square, Biltmore Estate

Bob Lewis Ballpark

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50%

% From Visitors

Destination Average: 41%

20%

% From 5 County

Destination Average: 12%

29%

% From Buncombe

Destination Average: 47%

Regional visitation was largely in the South (47%) and West (33%) of Asheville, with minimal visitation to downtown or other regions.

59% of visitors were also observed at an accommodation point of interest.

31% of visitors were observed at a retail point of interest and 17% at a food point of interest.

Top Cross-Visited Points of Interest: Buncombe County Sports Park, Holiday Inns (Biltmore West, Outlet Center Area, Asheville South), Country Inn & Suites Asheville West

John B Lewis Soccer Complex

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ZARTICO

30%

% From Visitors

Destination Average: 41%

16%

% From 5 County

Destination Average: 12%

54%

% From Buncombe

Destination Average: 47%

Visitors were most likely to be observed in East Asheville (40%) followed by Downtown (29%).

Other top regions visited were South (28%), West (21%) and North Asheville (13%).

42% of visitors were also observed at an accommodation point of interest.

35% of visitors were also observed at a Food point of interest.

Top Cross-Visited Points of Interest: Buncombe County Sports Park, Asheville Mall, Biltmore Village and Biltmore Town Square.

Pack Square Park

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45%

% From Visitors

Destination Average: 41%

14%

% From 5 County

Destination Average: 12%

41%

% From Buncombe

Destination Average: 47%

77% of visitors were observed at another Downtown point of interest.

26% were observed at a point of interest in the Biltmore Estate region.

56% of visitors were also observed at an accommodation point of interest.

47% of visitors were also observed at a Food point of interest. 45% were observed at an Attraction.

Top Cross-Visited Points of Interest: Biltmore Estate, Omni Grove Park Inn, Grove Arcade, Mast General Store, Biltmore Village, Downtown Hotels

NC Arboretum

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ZARTICO

35%

% From Visitors

Destination Average: 41%

17%

% From 5 County

Destination Average: 12%

66%

% From Buncombe

Destination Average: 47%

Regional visitation was largely centered in the South Asheville region (34%), Downtown (32%), and Biltmore Estate Region (28%).

9% of visitors were also observed in the River Arts District. 1% were observed in Black Mountain.

41% of visitors were also observed at an accommodation point of interest.

41% of visitors were observed at another attraction, 36% at a retail point of interest and 28% at a food point of interest.

Top Cross-Visited Points of Interest: Biltmore Estates, The Omni Grove Park Inn, Asheville Outlets, Biltmore Town Square, Great Smoky Mountain National Park, Asheville Regional Airport

TOURISM-RELATED CAPITAL PROJECT INVESTMENT STRATEGY

Table Discussion:

What do you believe is missing from the Asheville and Buncombe County experience that, if added, could make our destination even more dynamic?



DISCUSSION

QUESTIONS
INPUT
COMMENTS





BREAK

THE SESSION WILL RESUME IN 10 MINUTES

EXPLORE
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ONE TO THREE YEAR ASPIRATIONS

Chris Cavanaugh

Magellan Strategy Group | President

Vic Isley

Explore Asheville | President & CEO

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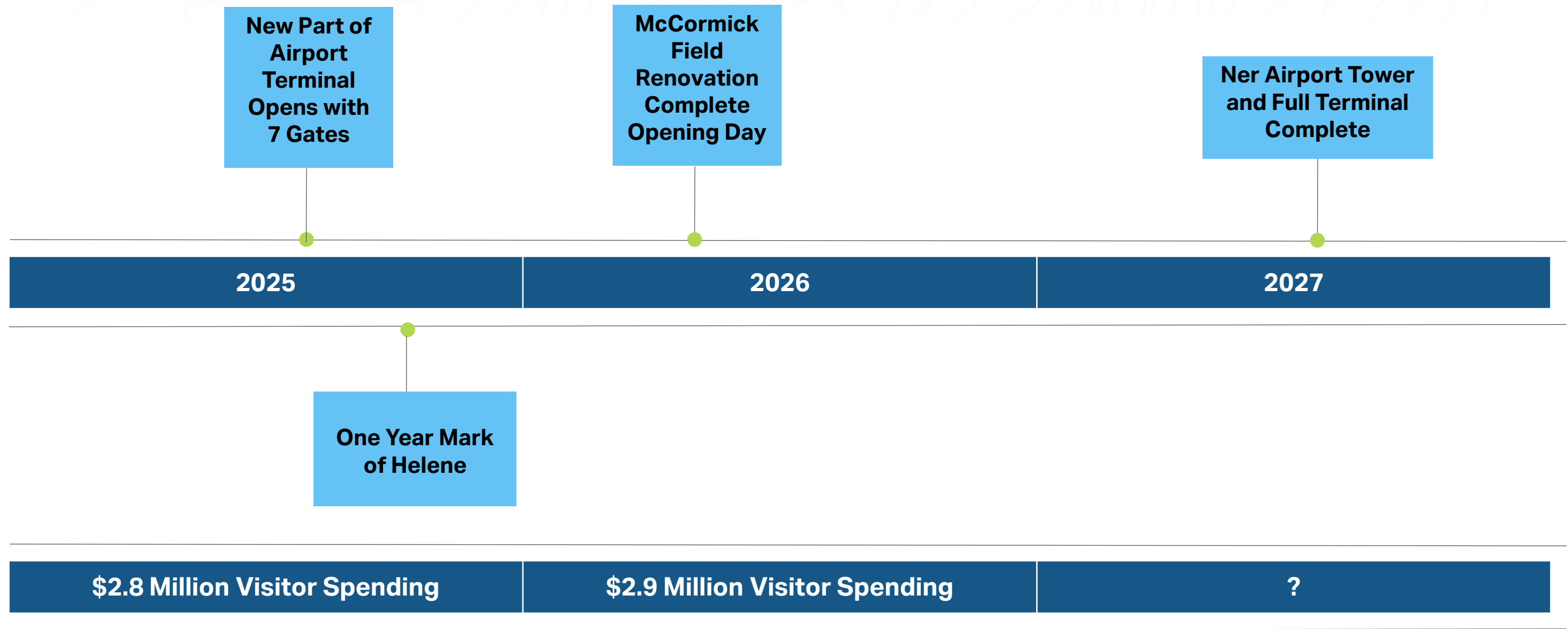
FRAMING & CONTEXT

Vic Isley

Explore Asheville | President & CEO

**EXPLORE
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CREATING A 1-3 YEAR ROADMAP



BRAINWALKING EXERCISE

THE SESSION WILL RESUME IN 15 MINUTES

EXPLORE
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WRAP-UP & ADJOURN

Brenda Durden
BCTDA | Chair

SPECIAL THANKS TO TODAY'S SUPPORTING PARTNERS!



YMI Cultural Center



ADJOURNMENT

Chair Brenda Durden

Questions/Comments

Suggested Motion:

Motion to adjourn the BCTDA Annual Planning Session.

Motion Second

Discussion

Vote





THANK YOU

See you at the next BCTDA meeting!

Wednesday, April 30, 2025 | 9:00 a.m.

Explore Asheville Board Room | 27 College Place

EXPLORE
ASHEVILLE

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Buncombe County Tourism
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