

CALL TO ORDER

Vice Chair HP Patel

 Call to order the Joint Meeting of the BCTDA, Public Authority and BCTDA Nonprofit Corporation



Board Meeting

Wednesday, July 23, 2025 | 9:00 a.m.

Explore Asheville | 27 College Place | Board Room (1st Floor)

Members of the public may attend in person or register here to view a livestream of the meeting.

AGENDA

9:00 a.m.	Call to Order the Joint Meeting of the BCTDA, Public Authority and BCTDA, Nonprofit Corporation	HP Patel
9:05 am.	Approval of June 25, 2025, Meeting Minutes	HP Patel
9:10 a.m.	June 2025 Preliminary Financial Reports	Mason Scott, Buncombe County Assistant Finance Director
9:20 a.m.	President & CEO Report a. Industry Metrics b. Other Updates	Vic Isley
9:35 a.m.	Strategic Imperatives: Progress Report a. Fourth Quarter Review (April 2025 – June 2025 Highlights)	Vic Isley, Sarajane Case, Michael Kryzanek, Tiffany Thacker Jennifer Kass-Green
9:55 a.m.	Business Development Performance Report	Michael Kryzanek; Colleen Swanson Meetings Database Institute Execut Vice President
10:15 a.m.	Buncombe County Commission Update	Commissioner Terri Wells
10:20 a.m.	Miscellaneous Business	HP Patel
10:25 a.m.	Comments from the General Public	HP Patel
10:30 a.m.	Adjournment SAVE THE DATE	HP Patel

Summer Social | August 4, 3 p.m. - 6 p.m. | The Radical, 95 Roberts St, Asheville, NC 28801

The next joint BCTDA monthly meeting is **Wednesday**, **August 27**, **2025**, at 9:00 a.m., at the Asheville Art Museum, located at 2 S Pack Square. 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.



FOR OUR REMOTE VIEWERS

Vice Chair HP Patel

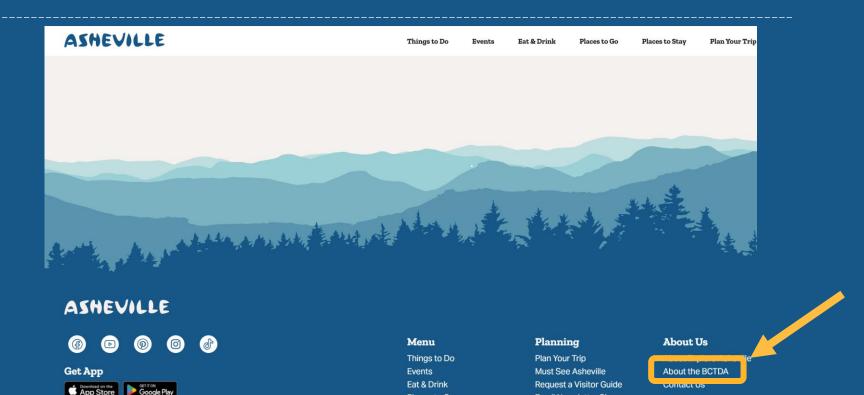
For our viewers watching remotely, documents were emailed to everyone who registered on Zoom by 8:00 this morning.

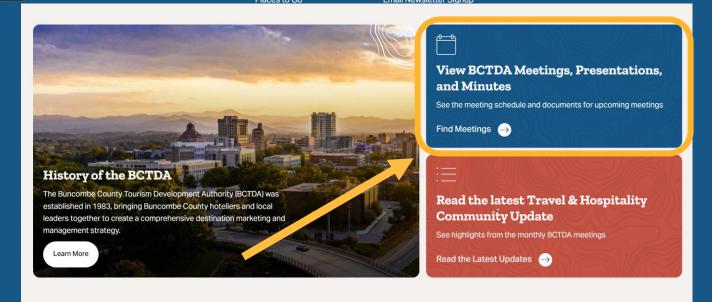
The agenda and meeting documents are also available online.

Additional materials, including the PowerPoint presentation, will be posted later today.

Go to:

- ExploreAsheville.com
- About the BCTDA section
- View BCTDA meetings, presentations, and minutes







WELCOME BOARD & GUESTS

Vice Chair HP Patel

Welcome board members and guests who are in attendance

Introductions around the room



JUNE 25 MINUTES

Vice Chair HP Patel

Questions/ Comments

Suggested Motion:

Motion to approve the June 25, 2025, BCTDA Board meeting minutes.

Motion Second

Additional Discussion

Vote



Buncombe County Tourism Development Authority
A Joint Meeting of the Public Authority and Nonprofit Corporation

Explore Asheville - 27 College Place, Asheville

Board Meeting Minutes Wednesday, June 25, 2025

Present (Voting): Brenda Durden, Chair; Matthew Lehman, Vice Chair; HP Patel, Michael Lusick,

Lucious Wilson, Elizabeth Putnam, Himanshu Karvir, Tim Rosebrock

Absent (Voting): Larry Crosby (attended online)

Present (Ex-Officio): Asheville Vice Mayor Antanette Mosley

Absent (Ex-Officio): Buncombe County Commissioner Terri Wells

Staff: Vic Isley, Jenn Kass-Green, Josh Jones, Ashley Greenstein, Dodie Stephens,

Michael Kryzanek, Karis Roberts, John Dawson, Jay Curwen, Tiffany Thacker,

Sarah Myers

BC Finance: Melissa Moore

Legal Counsel: Sabrina Rockoff, McGuire, Wood & Bissette

In-Person Attendees: Rick Bell, Asheville Hotel Association

Dave Nutter, Connect Buncombe

John Ellis, Retired

Jason Sanford, Ashvegas Morgan Sykes, Mtn Express Roy Harris, Community Member Olivia Ward, OnWard Media

Meghan Rogers, Asheville Independent Restaurant Association

Online Attendees: Tina Kinsey, Angi Daus; AVL Airport

Jim Muth. TPDF Committee

Felicia Sonmez, Blue Ridge Public Radio

Chip Craig, Greybeard Realty Lacy Cross, Movement Bank

Kit Cramer, Asheville Area Chamber of Commerce

Ali Wainright, Carli Adams, McKenzie Provost, Kimberly Puryear; Explore

Asheville

Diane Rogers, Pinecrest Bed & Breakfast

Mason Scott, Buncombe County

Randy Claybrook, Asheville Bed & Breakfast Association

Hannah Kaminer, Mast General Store

Kevin Beattie, Dean Hensley; WLOS Asheville, NC

Lucy Dozier, MMGY Global

Buncombe County Tourism Development Authority – June 25, 2025 BCTDA Meeting – Page 1 of 4





FINANCIAL UPDATES

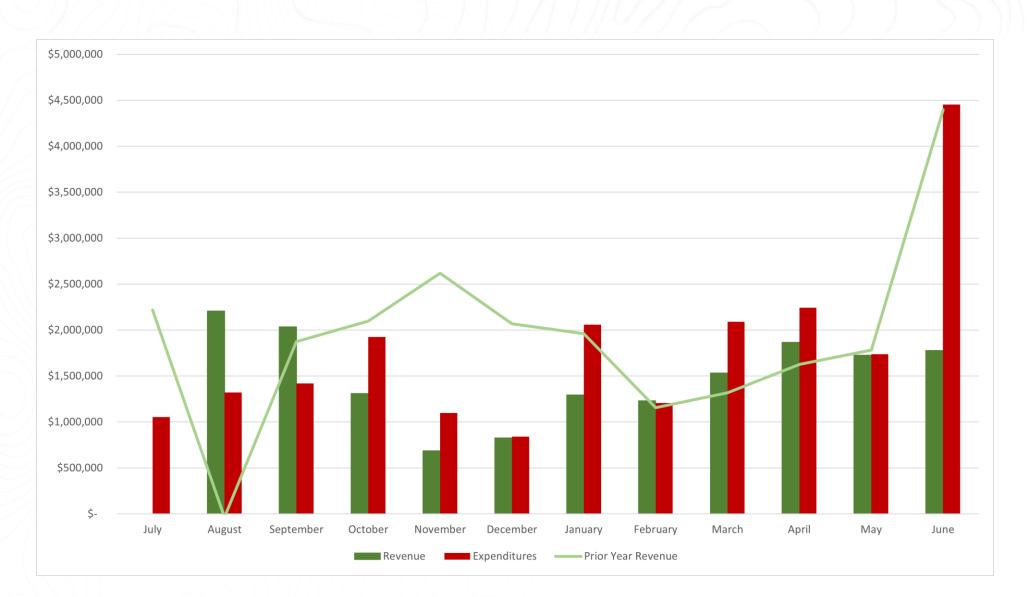
Mason Scott

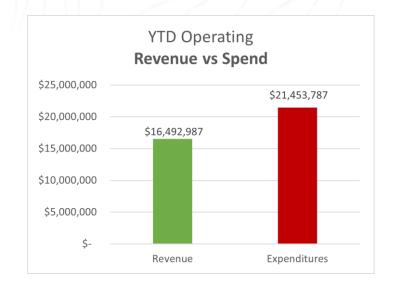
Buncombe County | Assistant Director of Finance

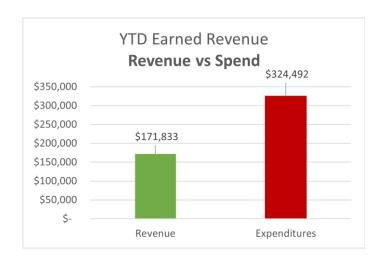


OPERATING AND EARNED REVENUE FUNDS

Revenues (Current and Prior-year) vs Expenditures (current year), June 2025 - PRELIMINARY







For more information, see financial and sales statements pages 1-3, and 7

OPERATING AND EARNED REVENUE FUNDS

Monthly Summary of Activities, June 2025 - PRELIMINARY

Operating Fund	Budget	Currer	nt Month Actual	Year	r to Date Actual	(%) Budget Collected/Used
Total revenues	\$25,729,965	\$	1,778,518	\$	16,492,988	64.1%
Total expenditures	φ25,729,965	\$	4,454,949	\$	21,453,785	83.4%

Earned Revenue Fund	Budget	Curren	t Month Actual	Year	to Date Actual	(%) Budget Collected/Used
Total revenues	\$350,000	\$	18,279	\$	171,833	49.1%
Total expenditures	φ330,000	\$	4,349	\$	324,492	92.7%

For more information, see financial and sales statements pages 1-2

PROJECT FUNDS: TPDF AND LIFT FUNDS

Monthly Summary of Activities, June 2025 - PRELIMINARY

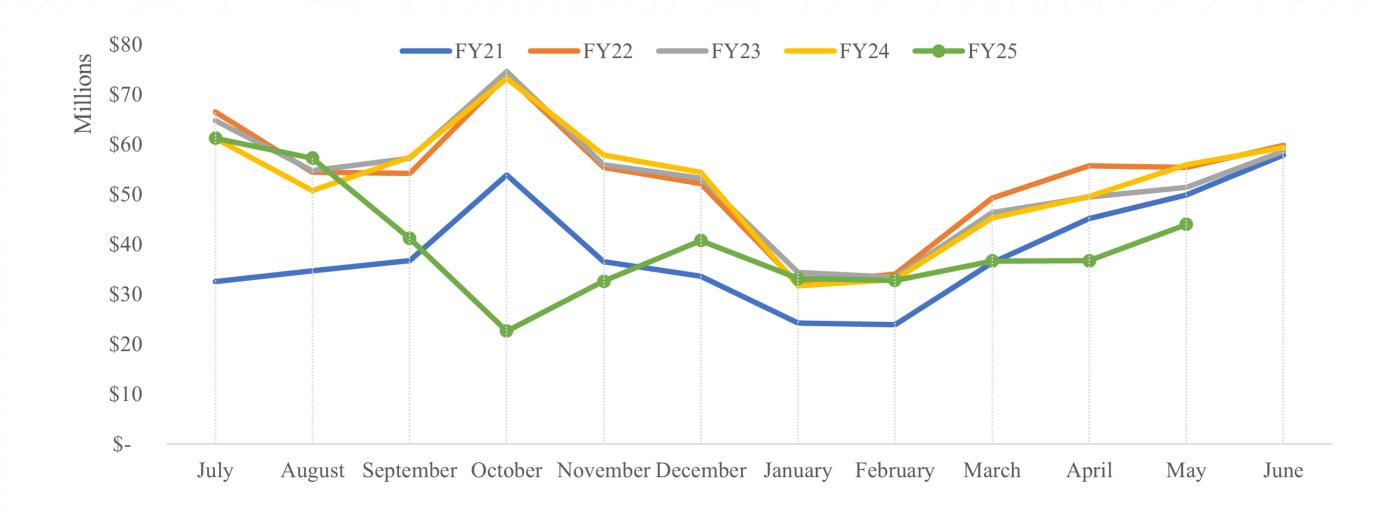
Tourism Product Development Fund	Budget	Current Month Actual	Life to Date Actual	(%) Budget Collected/Used
Total revenues	\$32,554,985	\$527,901	\$47,107,354	>100%
Total expenditures	\$32,554,965	\$189,635	\$6,671,692	20.5%
	Active projects	19		
Funding available for	or future grants	\$14,560,772		

Legacy Investment From Tourism Fund Budget		Current Month Actual	Life to Date Actual	(%) Budget Collected/Used
Total revenues	¢10 200 003	\$469,974	\$16,653,904	>100%
Total expenditures	\$10,390,903	\$100,583	\$497,312	5%
	Active projects	12		
Funding available fo	r future grants	\$6,263,001		

For more information, see financial and sales statements pages 3, 5, & 6

LODGING SALES

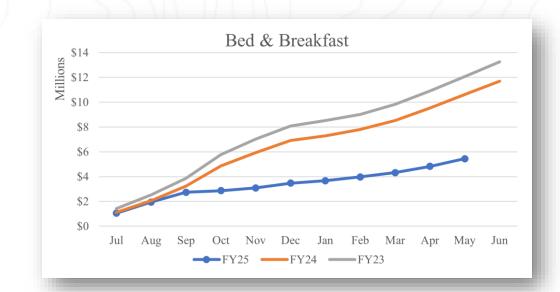
Shown by Month of Sales, Year-to-Date (5 years), June 2025 - PRELIMINARY

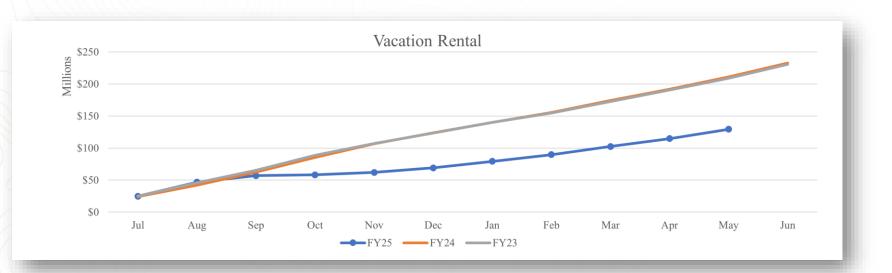


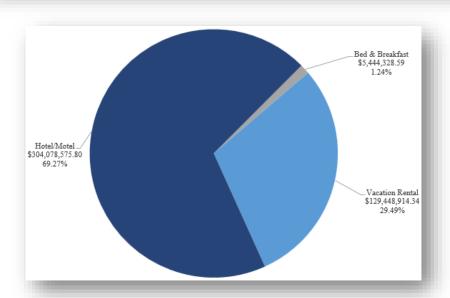
For more information, see financial and sales statements page 9

LODGING SALES

Activity by type and month, shown for 3 years, June 2025 - PRELIMINARY







For more information, see financial and sales statements pages 9 - 10

PRELIMINARY JUNE 2025 FINANCIAL REPORTS

Vice Chair HP Patel

Questions/Comments

Suggested Motion:

Motion to approve the preliminary June 2025 Financial Reports as presented.

Motion Second

Additional Discussion

Vote

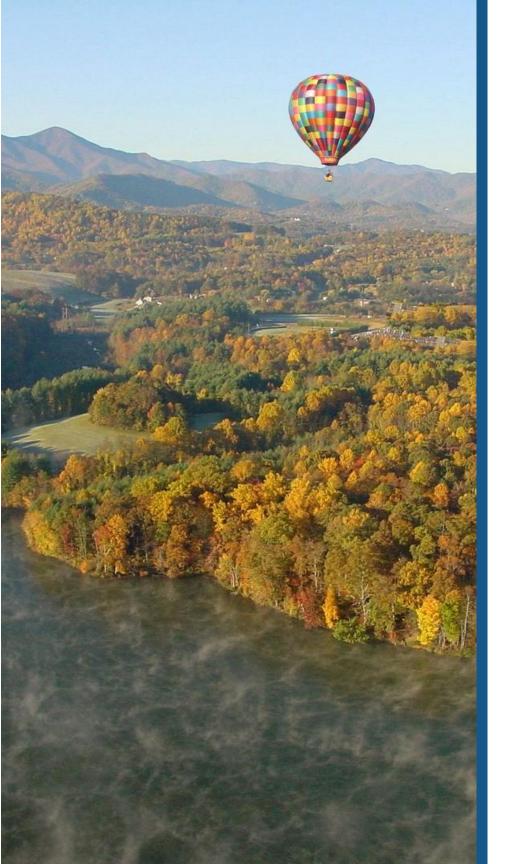




PRESIDENT & CEO REPORT

Vic Isley
Explore Asheville | President & CEO

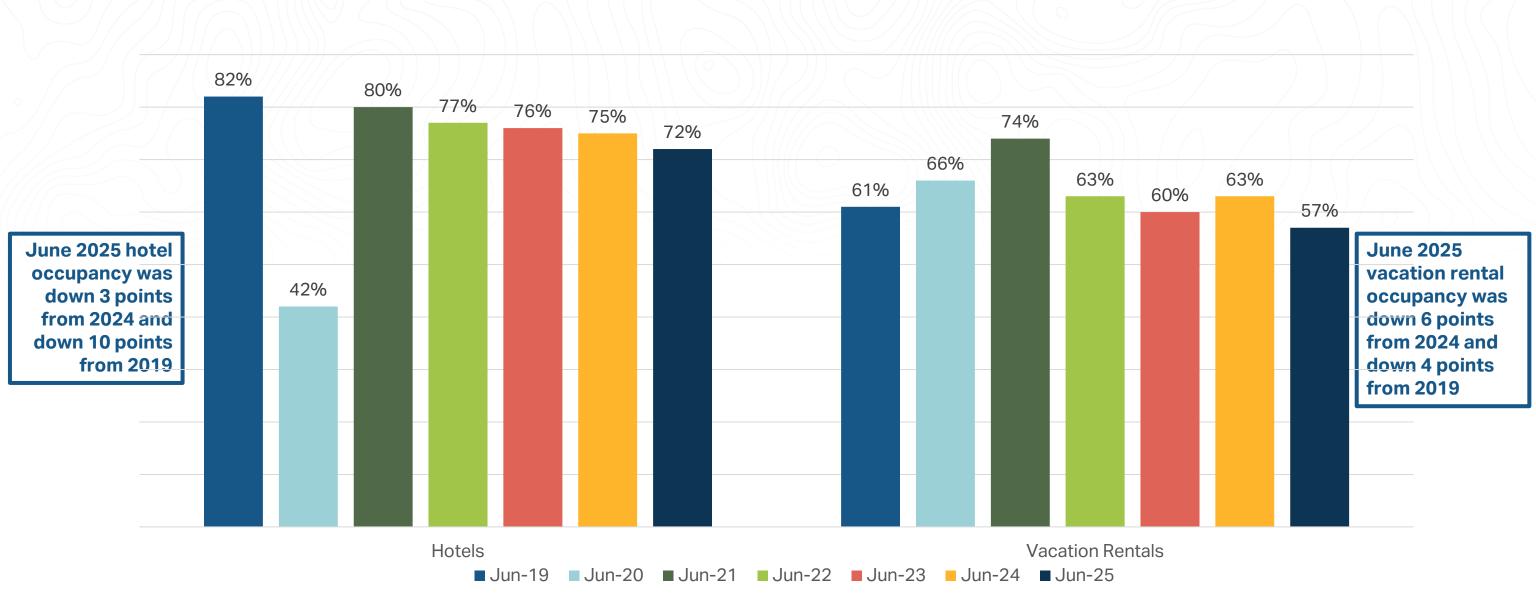




INDUSTRY METRICS



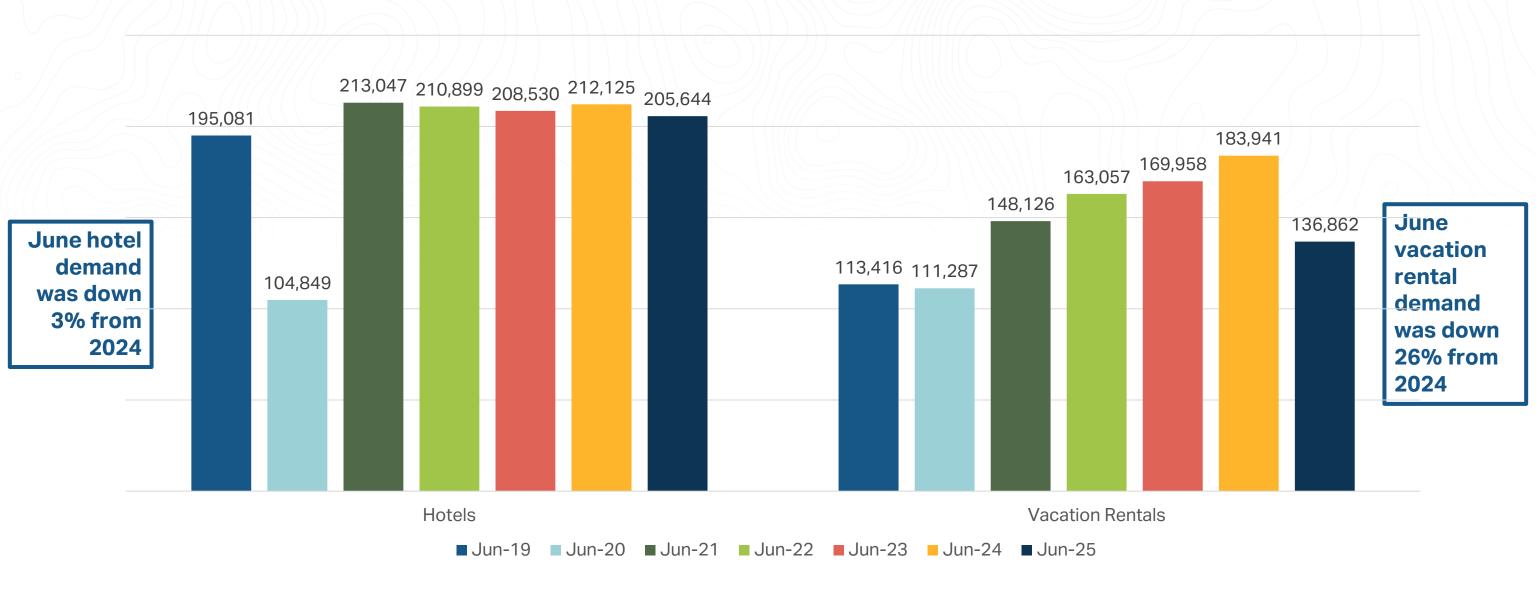
JUNE LODGING OCCUPANCY







JUNE DEMAND

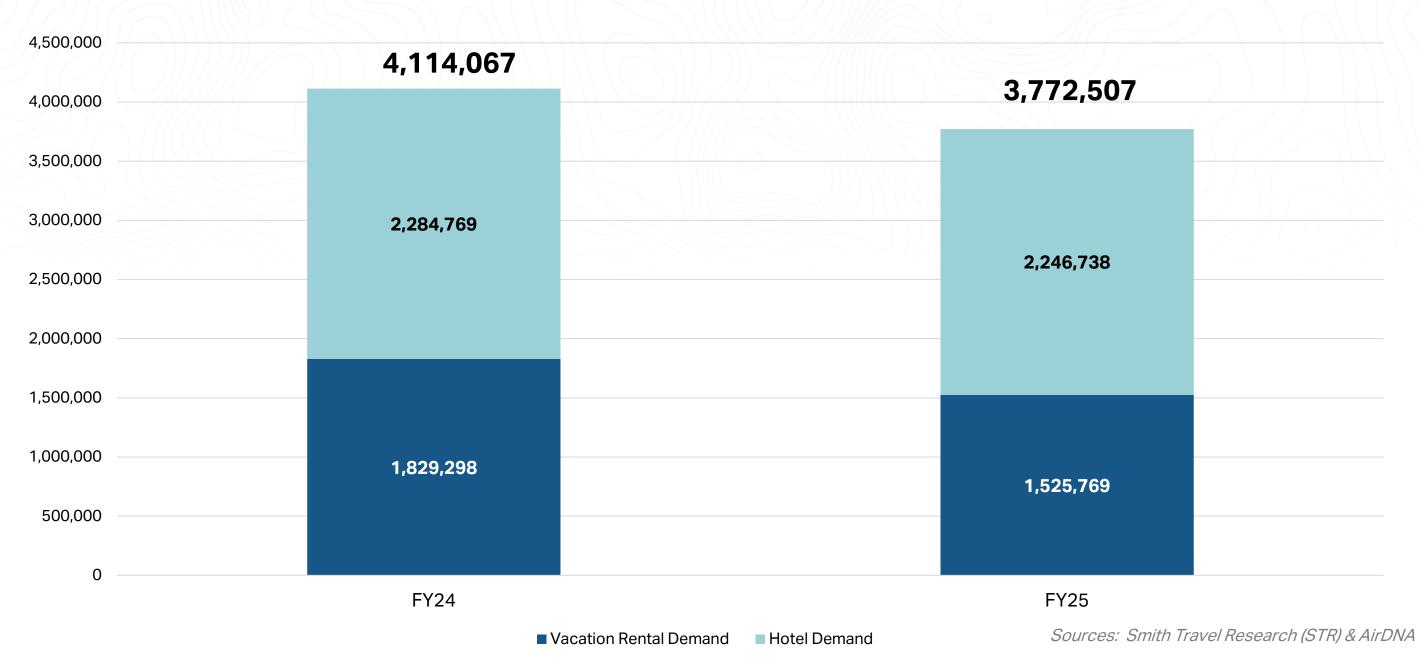




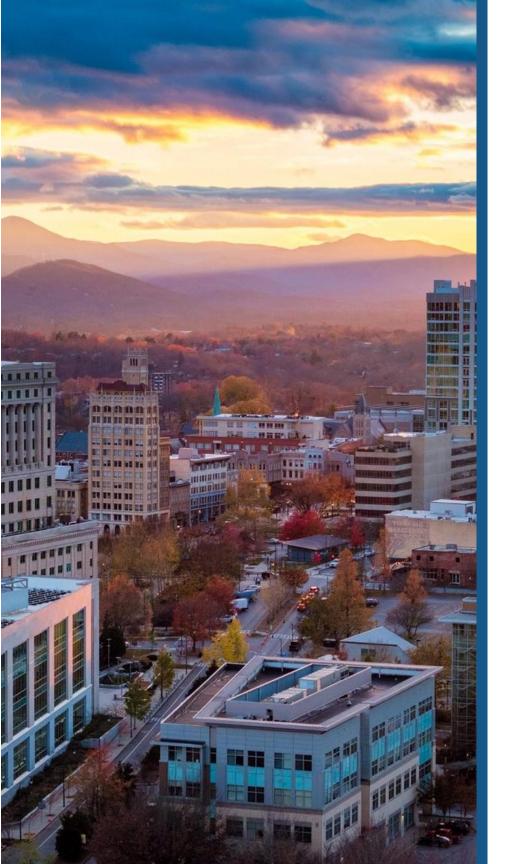


TOTAL ROOMNIGHT DEMAND

-8% change FYTD (July 2024 – June 2025)



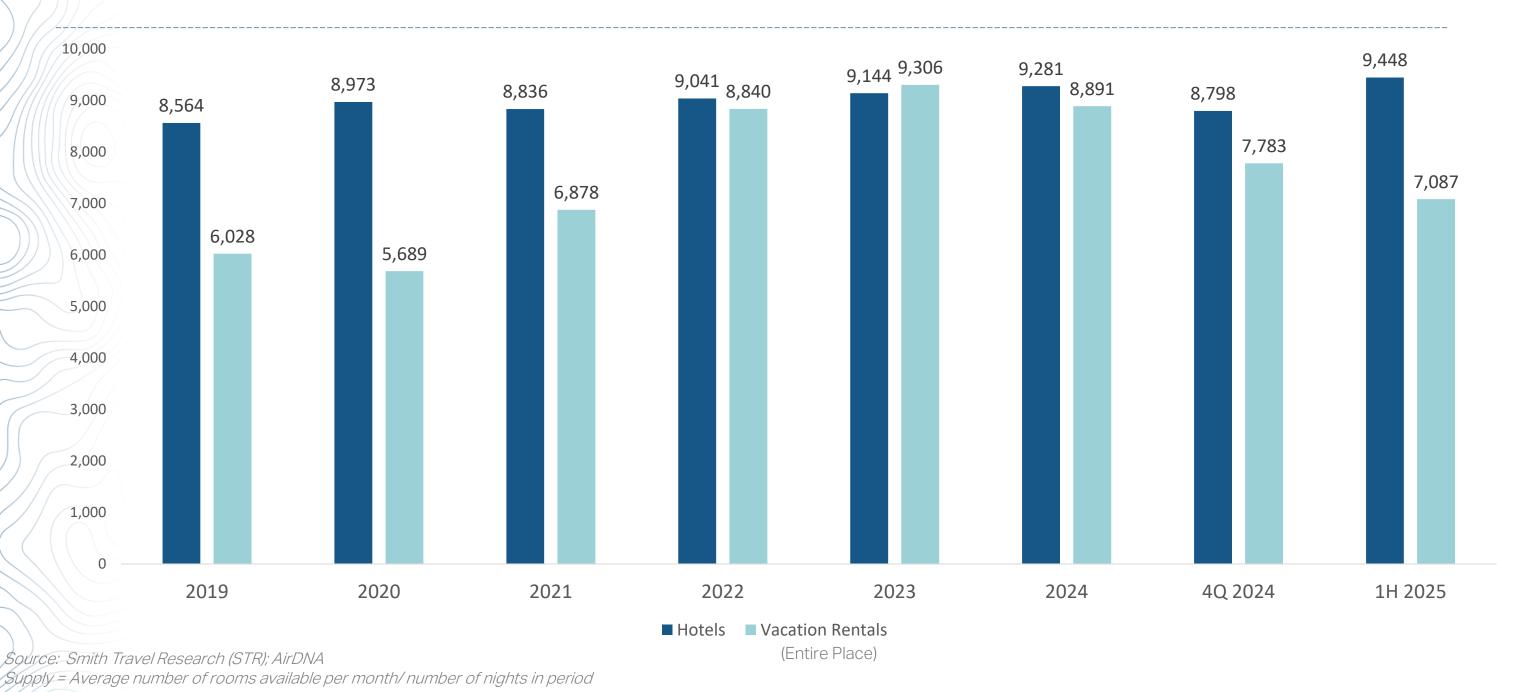




CALENDAR 2025 MIDYEAR LODGING PERFORMANCE



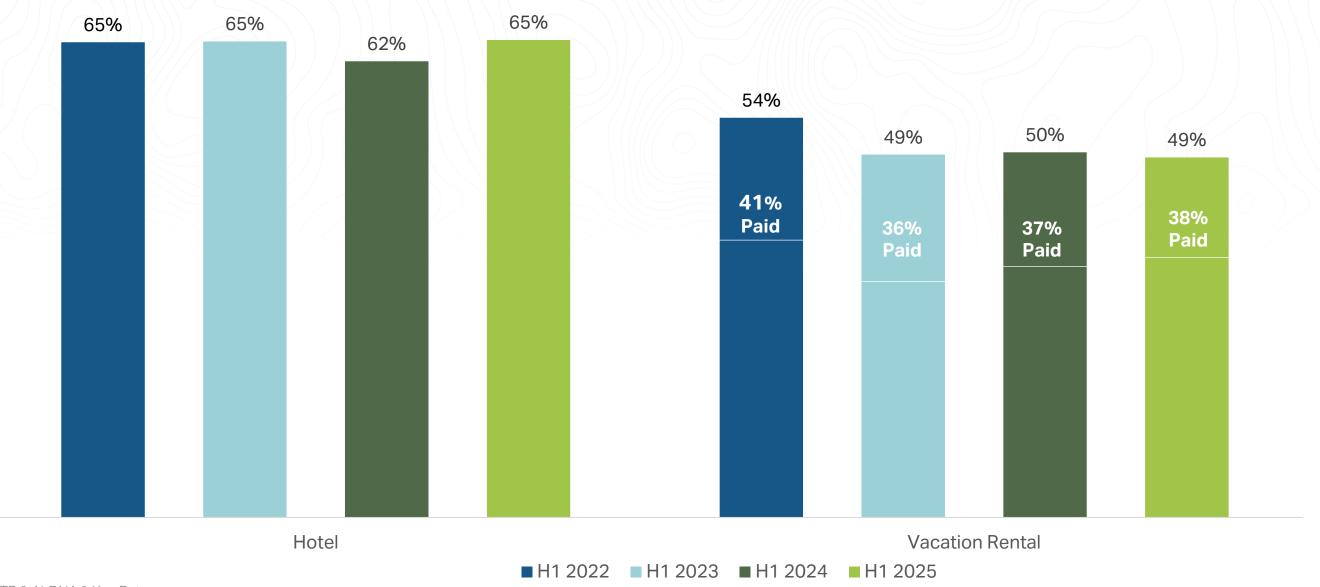
AVERAGE ROOMS AVAILABLE PER NIGHT BY LODGING TYPE, 2019 – 2024, 4Q 2024, & 1H 2025





AVERAGE OCCUPANCY COMPARISONS BY LODGING TYPE

Comparing first half (H1) of 2025 (January – June) to same period of three prior years



Source: STR & AirDNA & Key Data

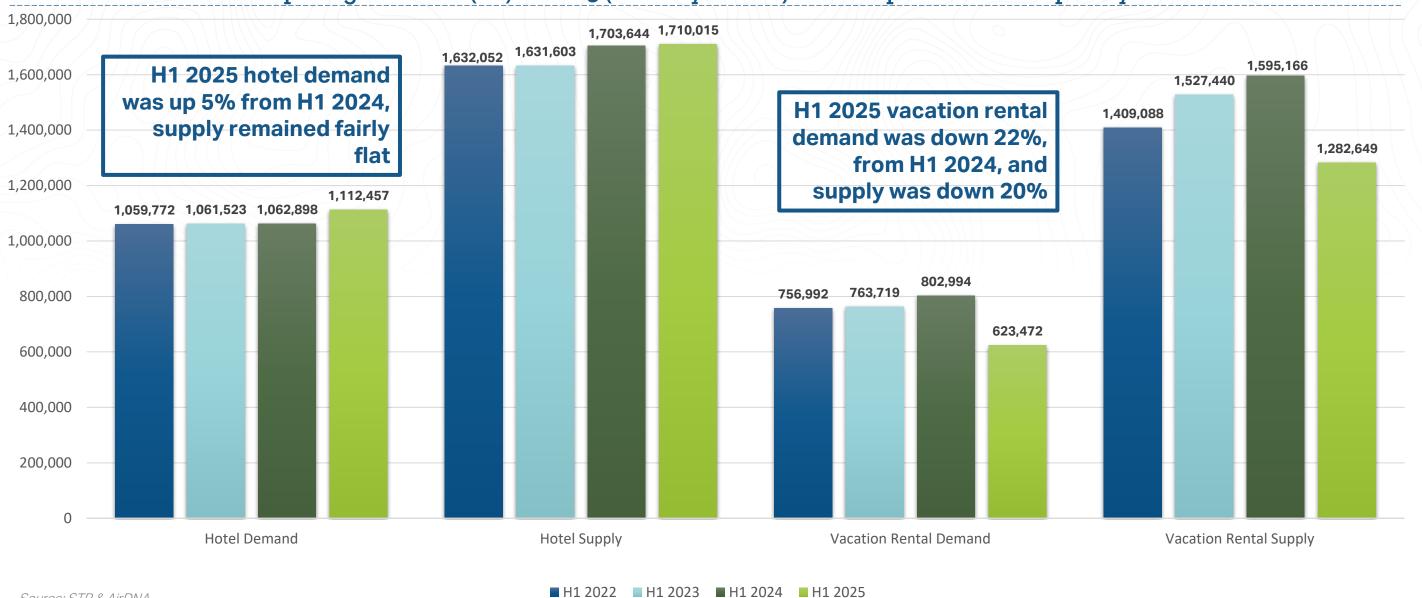
Average Occupancy = Percentage of rooms occupied for the period for hotels; percentage of listings occupied for vacation rentals.

Paid occupancy (Key Data) = Percentage of guest nights sold out of the total nights available for guests to book for vacation rentals.



ROOM DEMAND/SUPPLY COMPARISONS BY LODGING TYPE

Comparing first half (H1) of 2025 (January – June) to same period of three prior years



Source: STR & AirDNA

Room Demand = Total number of hotel rooms or entire place vacation rental rooms (Airbnb or VRBO/HomeAway) sold or rented (excludes complimentary rooms). (For example, a hotel with 100 rooms that sells 50 rooms each night in a 30-day month would have demand of 1,500 rooms. A 3 BR vacation rental shown available for rent all 30 days but rented only 15 days in the month would have demand of 45 rooms.) Room Supply = Total number of hotel rooms or vacation rental rooms (Airbnb or VRBO/HomeAway) available for sale for the period. (For example, a hotel with 100 rooms would have 3,000 rooms for sale in a 30-day month. A vacation rental with 3 BRs would have 90 rooms for rent in the same month if it were shown available for rent all 30 days.)



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LODGING SUPPLY GROWTH, 2018 - 1H 2025

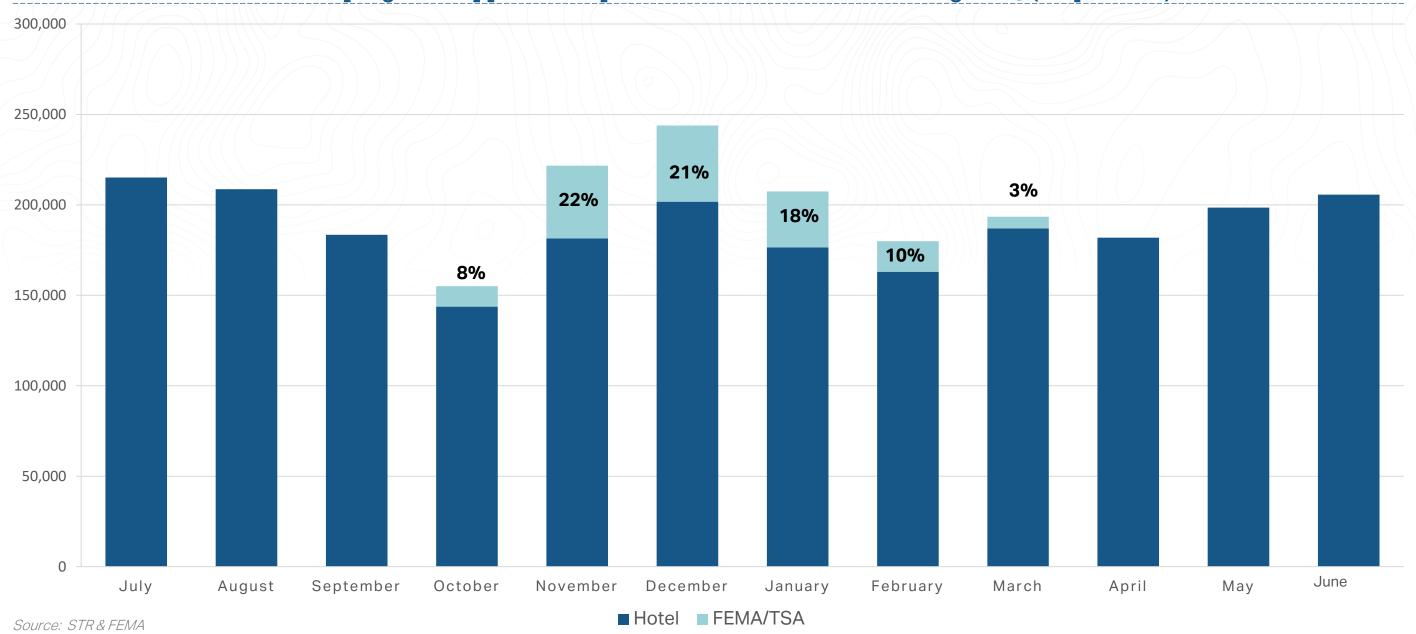
Year Over Year Percentage Growth in Supply of Hotels and Vacation Rentals

30% Moratorium Enacted September 2019 February 2021 Moratorium Lifted ---Hotels ---VRs **COVID Pandemic** 20% Helene 10% otel Asheville Hotel 0% Asheville H -10% -20% -30% 2020 2021 2022 2023 2024 2019 1H 2025 % Supply



HOTEL DEMAND CREATED BY FEMA TSA VOUCHER PROGRAM

Voucher program supported displaced residents in hotels during FY25 (July – June)





ADR/REVPAR COMPARISONS BY LODGING TYPE

Comparing first half (H1) of 2025 (January – June) to same period of three prior years



Source: STR & AirDNA

ADR = Room revenue divided by rooms sold, displayed as the average rental rate per room.

For vacation rentals = average daily rate charged per booked entire place listing. ADR includes cleaning fees but not other service fees or taxes.

RevPAR = Room revenue divided by rooms available. For vacation rentals = entire place listing ADR * occupancy.

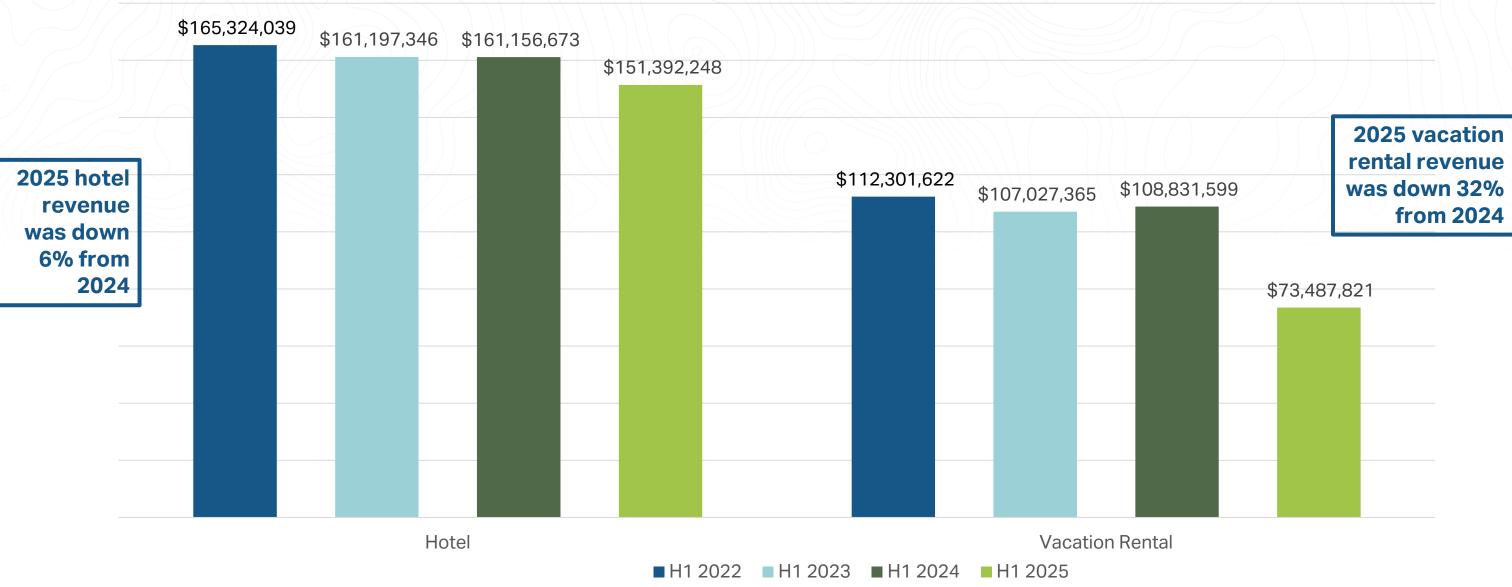


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REVENUE COMPARISONS BY LODGING TYPE

Comparing first half (H1) of 2025 (January – June) to same period of three prior years



Source: Buncombe County



COMPARATIVE MARKETS FOR ASHEVILLE

2025 YTD Hotel Performance (Jan – Jun)

Market	Number of Rooms	Number of Rooms	Occupancy	ADR	RevPAR	Room Rev% Difference YTD from 2024
Asheville, NC (Buncombe County, NC)	9,541	9,541	65%	\$146	\$95	-6%
Charleston, SC (Charleston County, SC)	22,915	22,915	72%	\$187	\$134	2%
Savannah, GA (Chatham County, GA)	19,399	19,399	70%	\$152	\$106	-3%
Wilmington, NC (New Hanover County, NC)	8,746	8,746	62%	\$145	\$90	6%
Chattanooga, TN (Hamilton County, TN)	12,776	12,776	59%	\$117	\$69	5%
Greenville, SC (Greenville County, SC)	10,955	10,955	73%	\$132	\$96	13%

(source: STR, LLC)



BUNCOMBE COUNTY SUBMARKETS

2025 YTD Hotel Performance (Jan – Jun)

Sub Market	Occupancy	ADR	RevPAR	Room Rev% Difference YTD from 2024
Buncombe County	65%	\$146	\$95	-6%
Downtown Asheville	61%	\$196	\$119	-10%
Biltmore Village	56%	\$181	\$102	-30%
Tunnel Road	79%	\$109	\$85	13%
Far East	68%	\$98	\$67	15%
West Asheville	61%	\$98	\$59	35%
Asheville Outlets	76%	\$113	\$86	19%
South Asheville	79%	\$131	\$104	19%



(source: STR, LLC)

NATIONAL TRENDS & LOCAL REALITIES

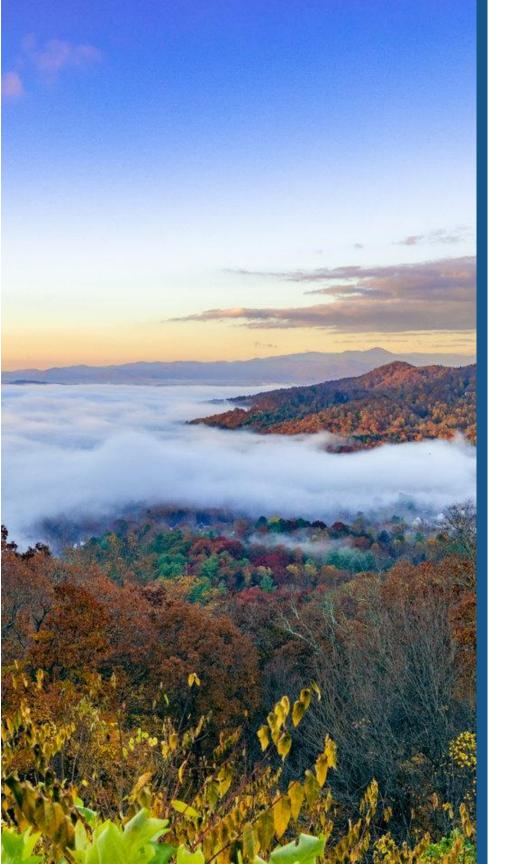
National Trends	Local Performance
GDP remains uncertain with 2025 outlooks being revised down from 2% to just over 1%, with the potential to impact Americans future travel plans, cutting back on number of trips and spending per trip.	In the wake of Helene, economic recovery for area business and resident livelihoods has been hampered by a lack of awareness that WNC is open for guests and further exacerbated by economic uncertainty nationally. Buncombe County unemployment was 4.5% in May 2025, with losses in the hospitality sector masking any gains in others.
Hotel lodging forecasts have been downgraded throughout the year, primarily due to economic uncertainty, with demand forecasted to grow just 0.5% relative to 2024. National natural disaster impacts and offsets will likely negatively influence growth in the back half of 2025.	Hotel occupancy impacted by the number of recovery workers and displaced residents using FEMA TSA vouchers in Q1. Charleston and Greenville experienced increases in the first half of the year and may have captured displaced demand from our area. Asheville market traditionally has higher performance in back half of the year, including July & October. Will closely monitor due to the slower return of leisure demand.
Demand for air travel remains strong but is expected to decelerate to just under 6% in 2025, compared to 10% in 2024.	Through May, air passengers were down 9%. With the new airport terminal open, AVL is expected to see record level seat capacity Aug-Oct 2025. Some larger in-state drive markets that were slower to return have started to show signs of rebounding.
Short-term rentals continue to take share from hotels; cruise line demand remains stronger than ever.	Buncombe County's vacation rental market was waning prior to Helene, with listings coming off the market. Effects of the storm accelerated that, with vacation rental share of rooms reduced back to 2019 levels.
90% of Americans have plans to travel in the next 6 months (down 3%) while concerns about gas prices rose to 23% this month. More than half of Americans report taking a touring trip, such as the Blue Ridge Parkway.	Our geographic location around I-40 and I-26 has been an asset in times when Americans choose to vacation closer to home. Accelerated progress on reopening more of the Blue Ridge Parkway will be critical.



CALENDAR 2025 MIDYEAR KEY TAKEAWAYS

- Lodging demand is a leading indicator of the visitor economy, but not the only indicator. 70% of what visitors generally spend in Buncombe County is outside of lodging businesses including food and beverage, retail and art galleries, tour providers and transportation as well as arts and entertainment.
- Hotel performance through the first half of the year was obscured by demand created by FEMA TSA voucher program to support displaced residents. Will closely monitor due to the slower return of leisure demand in months that are traditionally highest performing in the back half of the year.
- The vacation rental market was oversaturated prior to Helene, and continues to be down 20%.
- Explore Asheville booked nearly 40% more group roomnights this year, more than any other year in history. This lays an important foundation for business that generally contracts a lower room rate than transient/leisure. This could ultimately lead to a stronger market mix once leisure has rebounded fully.
- Overnight guest mix has changed in the recovery of Helene. Overall, we are hearing from a wide variety of business categories outside of lodging that revenues are down between 20-40% currently, with increased costs impacting potential profits.
- We will take a closer look at 2024 visitor spending by category next month.





OTHER UPDATES



SPECIAL EVENTS ON THE HORIZON

Summer Social + Intern Presentations



2025 Internship Presentation

Tuesday, July 29 | 10:30 am | Board Room



2025 Summer Social

Monday, August 4 | 3 – 6pm | The Radical Hotel



TRAVEL & HOSPITALITY NIGHT AT MCCORMICK FIELD

Celebrate 828 Day with Industry Friends & Colleagues at the Tourists Game on August 28th



Travel and hospitality industry professionals are invited to take advantage of discounted tickets for the Asheville Tourist's game on 8/28 against the Hub City Spartanburgers

This years Heroes of Hospitality winners will be recognized on field prior to the game and will be throwing the first pitch

Discounted price is \$5 per ticket and can be purchased through the private link: 828tickets.com

Code: 828night

Partners who purchase 10 or more tickets can contact Hannah directly at 818-378-1031



BOARD DISCUSSION

COMMENTS



EXPLORE ASHEVILLE & BCTDA'S STRATEGIC IMPERATIVES

The Buncombe County Tourism Development Authority (BCTDA) and Explore Asheville adopted strategic imperatives that are informing and guiding the direction of Explore Asheville's program of work and community investments going forward.

Delivering Balanced & Sustainable Growth	Encouraging Safe & Responsible Travel	Engaging & Inviting More Diverse Audiences	Promoting & Supporting Asheville's Creative Spirit	Running A Healthy & Effective Organization
Balancing resident and visitor needs, recognizing the necessary role that sustainable, long-term growth of travel has in achieving a healthy, collective economy. Focusing on the quality of each visit to our community – balancing growth across the seasons, business and leisure travel, and throughout Asheville and Buncombe County.	Engaging residents and visitors with shared values to care for and respect natural, cultural and human resources vital in delivering quality guest experiences. Collaborating with community organizations, local businesses and environmentally focused partners to support the sustainability and growth of our outdoor economy.	diverse audiences including	makers who help differentiate our destination through food and drink, visual and performing arts, experiences and more.	Investing in people, policies, and practices to serve our community with integrity within the organization's legislative requirements.

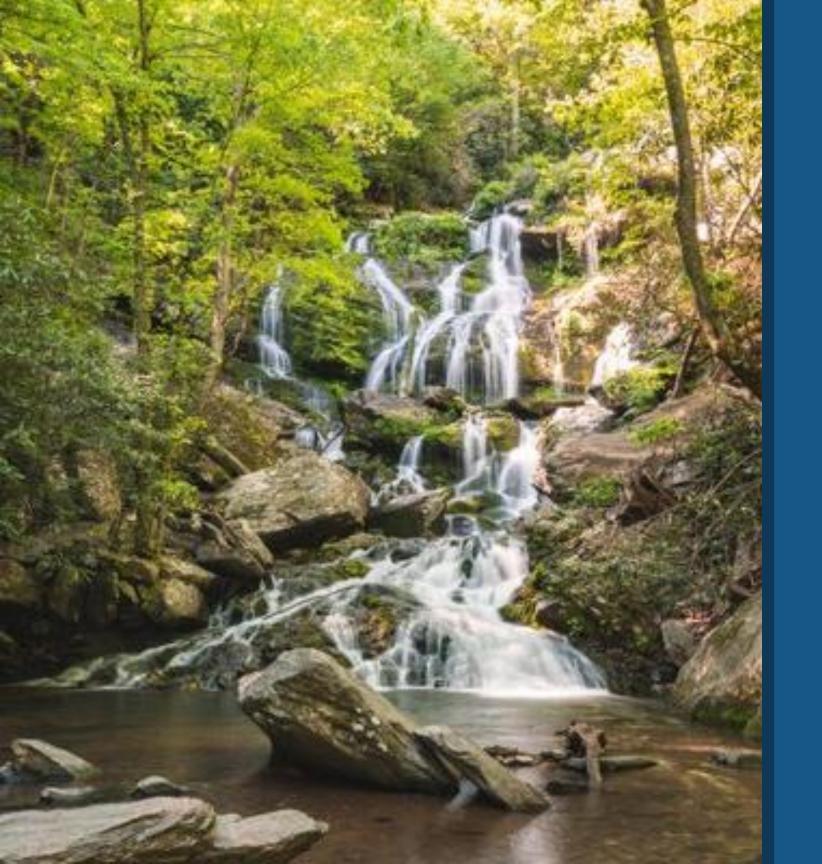
Explore Asheville staff generates quarterly reports on progress made toward these strategic imperatives and relevant initiatives that support them.



QUARTERLY HIGHLIGHTS

April 2025 – June 2025





MARKETING, CONTENT & PR Q4 INITIATIVES

Sarajane Case
Director of Marketing

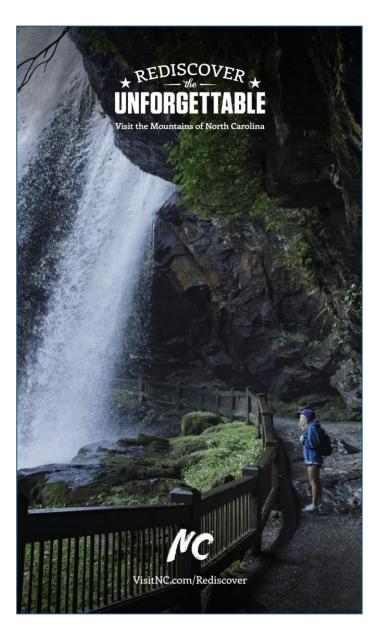


VISIT NC CO-OP AND REFRESHED BRAND SPOT

Visit NC Co-Op

Partnered with Visit NC for Co-Op program, investing \$2 million in messaging around Western NC's open status to priority markets. Tactics include:

- Linear Television Placements Explore
 Asheville and Visit NC spots ran at a 50/50 split in target markets
- CTV Placements all performing above benchmark across all placements in May and June with an average video completion rate of 99.5%
- Out of Home Placements Visit NC + Explore Asheville creative ran in high visibility placements at a 50/50 split.





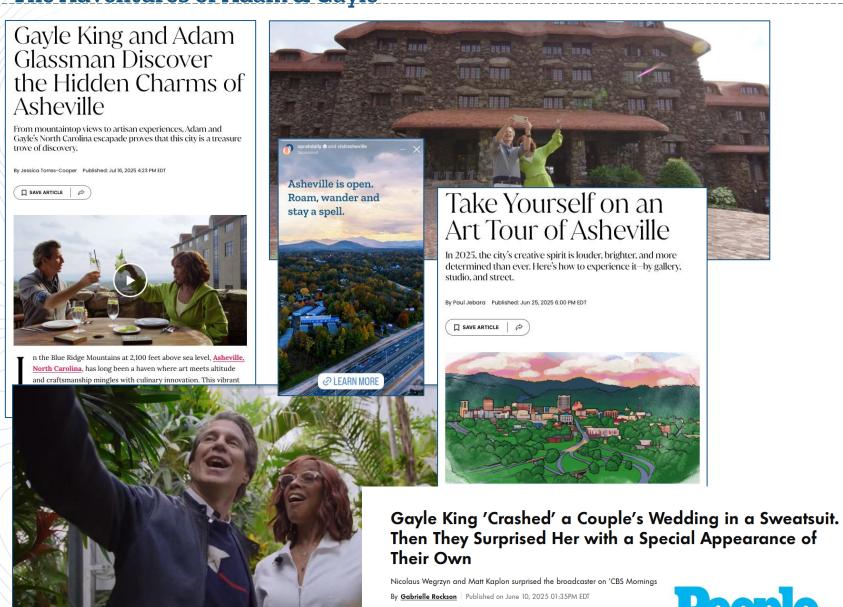
Estimated Impressions Served: 14M+





OPRAH DAILY

The Adventures of Adam & Gayle



Custom hero video, following Adam & Gayle around the destination as they explore the Tailgate Market, Biltmore, Arboretum, and other iconic sites in Asheville.

- 2x custom Content Articles to expand storytelling around Asheville's art and music cultures
- Social amplification, promoting the hero video, and Asheville as a destination.
- Display banners driving to the Explore Asheville site
- Custom rich media units to push brand messaging to the Oprah Daily Audience.
- Unexpected organic reach.

Total Impressions and counting: 10M+

☐ LEAVE A COMMENT

©CBS MORNINGS



DIRECT FLIGHT SUPPORT

Washington, DC

Allegiant Co-Op

Partnered with Allegiant Airline to determine markets requiring messaging to impact flight bookings to Asheville and run messaging across a series of tactics including:

- Cinema Pre-Roll + Display Retargeting Co-branded video spots ran in target market movie theaters, and movie-goers were retargeted with co-branded display banners.
- Out of Home Placements Co-branded OOH creative ran, featuring Explore Asheville logo and imagery
- **Linear Placements** ran in target markets, running co-branded video placements with Explore Asheville and Allegiant b-roll.
- CTV Placements an in target markets, running co-branded video placements with Explore Asheville and Allegiant b-roll.

Good Morning Washington

WJLA – Washington ABC Good Morning Washington – 5x segments every morning for five days featuring Outdoor Adventure, Foodtopia, Family Travel, Arts Culture and Pride.

Estimated Impressions Served in DC: 13M+







RECOVERY MARKET OF FOCUS

Raleigh, NC







June Raleigh Takeover

To impact immediate travel from Raleigh, Explore Asheville deployed a series of media tactics emphasizing the destination's open status in the Raleigh, NC, market.

- iHeart Radio Audio Spots
- Digital + Traditional Out of Home Boards
- Linear Television Spots
- Raleigh Today 6/13-6/30
- Broadcast Segments
 - WRAL Raleigh NBC Inside Look
 - WTVD Raleigh ABC Local Spotlight

Total Estimated Impressions Served in Raleigh: 4M+

Source: Zartico + Arrivalist



ON-SITE BROADCAST EFFORTS

To illustrate Asheville's open status and impact immediate travel to the destination, Explore Asheville partnered with several broadcast partners in target markets to highlight activities and attractions relevant to each station's audience, and emphasize the destination's readiness for visitors.

The Broadcast Experts Media Tour

- Syndicated to the following stations: Atlanta NBC, Washington D.C. FOX, Tampa ABC,
 Raleigh ABC, Charleston ABC, Houston CW, Miami CW
- 37,649,730 impressions delivered across all stations

Charlotte:

 WJZY: Fox Positively Charlotte | 3x segments featuring shopping, family friendly travel and wellness trips. (Airings taking place through late July)

Raleigh:

- WRAL Raleigh NBC Inside Look (6/23-6/27)
- 50,200 total impressions delivered
- WTVD Raleigh ABC Local Spotlight (Broadcast Experts segment aired to be shot and aired 6/5, additional ABC shoot + airings to take place in mid-late August 2025)

Chicago:

WLS-TV - Chicago ABC Local Spotlight + Windy City Weekend
 (Shoot + airings to take place in mid-late August 2025)

Washington D.C.

 WJLA - Washington ABC Good morning Washington | 5x Segments featuring Outdoor adventure, Foodtopia, Family Travel, Arts Culture and Pride.











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Promoting & Supporting Asheville's Creative

"OPEN & READY" CONTENT HIGHLIGHTS

Q4 content reaffirmed that Asheville was open and ready for exploration

Video and Visual Storytelling

- <u>Downtown Neighborhood Video</u>: Final video in the neighborhood series published, highlighting vibrancy and creativity in the city center.
- LGBTQIA+ Pride Video: Celebrated Asheville's year-round LGBTQIA+ spirit and sense of belonging.
- <u>36 locations captured in 3 months</u>: Strategic photo and video shoots across open businesses, attractions, and public spaces to visually demonstrate post-Helene recovery.

Social Content

Tiny Neighborhood Guides: Shared tiny guides to Weaverville, West Asheville,
 Downtown Asheville, Fairview, Black Mountain and The River Arts District on social during National Travel and Tourism Week.

Editorial Content

- How to Enjoy the Blue Ridge Parkway Near Asheville Post-Helene: Highlighted accessible overlooks, hikes, and scenic drives near Asheville post-Helene.
- <u>Summer 2025 French Broad River Guide:</u> Highlighted safe, responsible ways to enjoy the river post-Helene.

Partner Toolkit

 Open and Ready Summer Toolkit: Provided partners with messaging and creative assets to amplify the story of Asheville's readiness across their own channels.





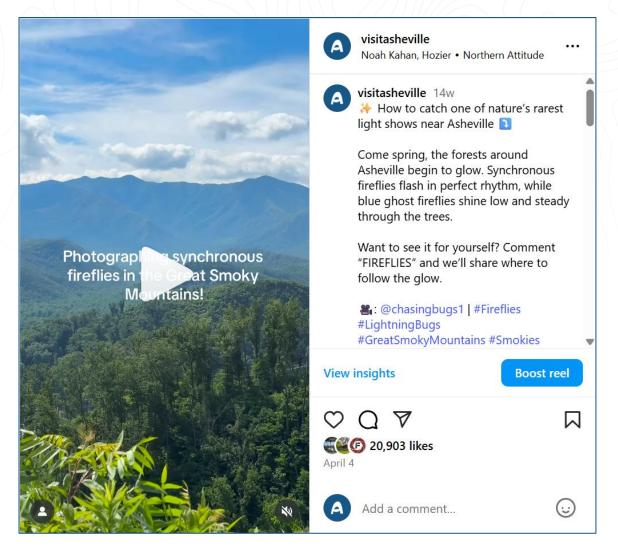


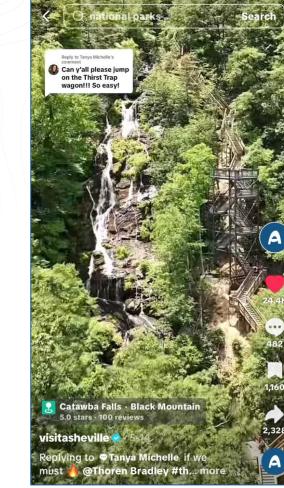
Lingaging & inviting wide Diverse

Promoting & Supporting Asheville's Creative

TOP PERFORMING SOCIAL POSTS







FACEBOOK

Dambo Announcement

24,963 Engagements

INSTAGRAM
Synchronous Fireflies
33,738 Engagements

TIKTOK

<u>Catawba Falls "Thirst Trap"</u>

27,231 Engagements

Engagements = Likes, Comments, Saves, Shares



NOTEWORTHY NEWS CLIPS

Pitching stories that shine a spotlight on the Asheville area

23.5B

Potential Media Reach

\$157.9M

Publicity Value

Site Visits

29

Significant Team **Placements**

75

Total Placements





'These mountains are still here.' Asheville is ready for your visit



Asheville rebuild?

Can rare 'blue ghosts' help

ESSENCE

The Black Girl's Guide To Travel: JOMO-Friendly Destinations For Rest And Recharge

GARDEN

A Weekend Guide to Black Mountain, a Resilient Beauty in Western North Carolina

Southern Living

You Might Feel Like You've **Stepped Into 'The Gilded** Age' In This Southern City

Accolades



America's Best Towns to Visit in 2025



Best places to travel in 2025



Best Music City



Media Mission

ASHEVILLE TEA CULTURE GROUNDS & NOURISHES



BUSINESS DEVELOPMENT Q4 INITIATIVES

Michael Kryzanek

Vice President of Business Development



Delivering Datable & Sustainable

MO SUMMIT 2025

\$250,000 of direct spending in our community

- Impact Event held April 21-23
- Known as the premier gathering for impact CEOs, the MO Summit brings together leaders who are redefining capitalism and creating solutions to the world's most pressing social and environmental issues. The event features a combination of core panel discussions and extensive networking opportunities.
- The 8th annual MO Summit attracted over 100 CEOs of high-growth, positive-impact companies, leaders at the forefront of using business as a force for good, creating an inclusive, regenerative and sustainable future.
- Explore Asheville, with support from the Asheville Area Chamber of Commerce, was a headline sponsor. Vic Isley presented at the opening reception/dinner and Clark Duncan moderated a panel discussion.
- The MO Summit will return to Asheville March 16-18, 2026











Delivering Balanced & Sustainable Growth

TRADE SHOW EXHIBITING

Recruited group and event business to Buncombe County

Attended ten trade shows and events to build relationships with professional meeting planners and tour operators.

- Prevue Incentive Evolution
- National Tour Association Contact
- Georgia Society of Association Executives
- Adventure Travel Trade Association
- SC Society of Association Executive Conference
- North Star's Incentive Live
- SITE SE Supper
- Cvent Connect
- US Travel Association's IPW
- HelmsBriscoe Annual Business Conference

Events are carefully analyzed, number of contacts, potential opportunities for our city, past experience and number of leads.





Growth

Q4 GROUP & EVENT DEVELOPMENT

Benefitted businesses in our community

113

GROUPS/EVENTS
OCCURRED
IN OUR COMMUNITY



\$16.0 million direct spending 19,300 roomnights

130

GROUPS/EVENTS
BOOKED
FOR FUTURE VISITS



\$11.9 million in direct spending 14,950 roomnights

43% increase in number of groups/events booked

Over FY 24

226

LEADS GENERATED FOR POTENTIAL GROUPS/EVENTS; 78,937 ROOMNIGHTS



4.0 % increase in roomnights over Q4 FY24





PARTNERSHIP & DESTINATION MANAGEMENT Q4 INITIATIVES

Tiffany Thacker

Partnership & Destination Management



EXPLORE ASHEVILLE TRAVEL & HOSPITALITY EARTH DAY CLEANUP

Industry partners cleanup 5 areas of Buncombe County

- 100+ travel and hospitality partners and community members joined Explore Asheville's Travel & Hospitality Earth Day Cleanup on April 28
- With support from <u>Asheville</u>
 GreenWorks, <u>RiverLink</u>, and
 <u>MountainTrue</u> teams collected
 more than 4,000 pounds of trash
 and debris from the following 5
 neighborhoods:
 - o Biltmore Village 1,920 lbs
 - o Black Mountain 540 lbs
 - Downtown 270 lbs
 - o River Arts District 1,130 lbs
 - o Weaverville 150 lbs













HEROES OF HOSPITALITY AWARDS LUNCHEON

The Heroes of Hospitality Awards Luncheon brought together more than 200 industry partners to honor the 60+ nominees powering the region's recovery and resilience during challenging circumstances. The event celebrated these ambassadors of Asheville and Buncombe County, including the six recipients of the Heroes of Hospitality Award.

2025 Heroes of Hospitality Award Recipients:

- Elvira Sanchez, housekeeping supervisor at <u>Grand Bohemian Asheville</u>, <u>Autograph Collection</u>
- o Fran and Taylor Montgomery, owners at Montgomery Sky Farm
- Katie Kasben, concierge at The Inn on <u>Biltmore</u> Estate
- o Katherine "Kat" Bell, bartender at <u>Tall John's</u>
- Erin Cronin, lead cook at <u>Bear's Smokehouse BBQ</u> and World Central Kitchen
- Philip DeAngelo, owner of <u>Philip DeAngelo Studio</u>

Each recipient received a custom glass bowl from <u>Small Batch Glass</u> <u>Company</u> in the River Arts District and a \$500 gift card. All nominees received a certificate of nomination and a custom bag of Asheville-made products by <u>Asheville Goods!</u>











INAUGURAL HOSPITALITY SCHOLARSHIP AWARDS

Three Local Students Honored with Inaugural Explore Asheville Scholarship

The Heroes of Hospitality Awards Luncheon marked the launch of the Explore Asheville Hospitality Scholarship Program. This new initiative supports students pursuing hospitality, travel, and serviceoriented careers.

Recipients will receive \$2,500 per year for up to four years, which can be used for tuition, housing, books, or other education-related expenses at any post-secondary institution in North Carolina, including certificate programs and degrees.

Inaugural Scholarship Recipients:

- Gillian Kerns: Kerns, a junior at Western Carolina University majoring in Hospitality and Tourism Management with a Psychology minor
- Kayleigh Schofield: Schofield, an Owen High School senior, plans to major in communications at Appalachian State University
- Nathan Tucker: Tucker is a T.C. Roberson High School senior focused on culinary arts. Tucker won first place at the SkillsUSA North Carolina State Culinary Competition, and represented the state at the national competition in Atlanta in June, where he came in at an impressive 11th place.





BCHT PHASE II MURAL RIBBON CUTTING

Phase II of the Black Cultural Heritage Trail unveiled at community event in South Slope

On May 8, Explore Asheville and the Riverfront Development Group hosted a community celebration unveiling the first mural along the <u>Asheville Black</u> <u>Cultural Heritage Trail.</u>

Local artist Tommy Lee McGee's new mural in South Slope offers gratitude, respect, and honor to Black and Brown women, marking the first of three murals planned for the trail.

The Hayes High Steppin' Majorettes and Drum Corps performed to celebrate this occasion, alongside a block party including local Black artists, musicians, and makers featured at Chemist, The Funkatorium, Green Man, Burial, Good Hot Fish, and The Whale.







CONCIERGE WORKING GROUP

Connecting partners within the travel and hospitality community

Explore Asheville hosted our latest quarterly Concierge Working Group Meeting on June 11 at the Grand Bohemian Lodge, where 50 attendees learned about health and wellness visitor experiences and marketing resources.

- Mini Wellness Fair & Experiences: Participants took part in a sound bath, tarot readings, auratherapy, and a mini wellness fair featuring the following partners: Asheville Wellness Tours, Auratherapy, and Shoji Spa. Attendees received coupons to experience additional tours on their own time.
- Marketing & Visitor Resources: Sarajane Case, Explore
 Asheville's Director of Marketing gave an overview of available
 resources attendees can use to learn about visitor
 experiences, events, and where they can direct visitors to
 learn more.

Background on Concierge Working Group

Since the first Concierge Working Group meeting was held in May 2024, we have hosted 5 meetings and have had nearly 100 people signed up to participate in various visitor-facing roles, ranging from concierges, visitor center volunteers, to general managers and bed and breakfast owners.







TOURISM PRODUCT DEVELOPMENT FUND (TPDF) EXPEDITED FUNDING

The authority approved funding early in the 2025 TPDF Cycle for two key projects

On May 28, 2025, the board approved the TPDF Committee's recommendations to expedite approval for 2 projects due to urgent needs and strong alignment with strategic priorities

Asheville Buncombe Youth Sports Association – John B Lewis Soccer Complex Restoration (\$2,155,000 awarded)

- Replace artificial turf damaged by Hurricane Helene
- Repair underground stormwater system
- Restore lighting infrastructure (16 field poles)

Enka Youth Sports Organization – Bob Lewis Ballpark Updates (\$500,000 awarded)

Pave and stripe existing gravel lots to maintain tournament capacity

- Prevents a reduction from 45 to 25 teams per event
- Avoids loss of ~640 teams and ~39,000 visitors per season
- Enhances visitor safety







EVENT GRANTS & SPONSORSHIPS

Support for local festivals & cultural events through grants and sponsorships

Explore Asheville / BCTDA supported the following events in FY25 Q4

- Maker Faire Asheville
- AIR's Taste of Asheville
- DTA5: Downtown In Bloom
- UNCA's Our Turn to Play 2025
- Pritchard Park Culture & Arts Series
- Weaverville's Music on Main
- 17th Bi-Annual Asheville Bread Festival GRINDfest
- Connect Beyond Festival
- ADA's Community Concert

- Juneteeth Celebration
- Asheville Beer Week
- DTA5: Juneteenth Celebration
- LEAF May Retreat
- {Re}HAPPENING23
- Coda Music Festival
- ArtsAVL State of the Arts Brunch

\$53.3k

Grants & Sponsorships









Events



NEW PARTNERSHIPS & OPERATIONAL STATUS UPDATE

Onboarded 46 local businesses as Explore Asheville partners in Q4; 152 in FY25

- Explore Asheville onboarded 46 local businesses as new partners in Q4
- In FY25, Explore Asheville welcomed a total of 152 new partners to our network. More than 40% of new partner businesses are diversly owned/operated.
- **Operational Status Update:**
 - **Open: 1,295 (86.9%)** | ↑ 9% from Q3
 - **Temporarily Closed: 89 (6%)** $\downarrow \downarrow 23.3\%$ from Q3
 - **Call for Status: 35 (2.3%)** | \downarrow 42.6% from Q3
 - **Permanently Closed: 71 (4.8%)** $|\downarrow$ 12.3% from Q3

WHAT & WHERE

Regions of new businesses:

- Black Mountain
- Biltmore Village
- Downtown
- North Asheville
- River Arts District
- South Asheville
- Weaverville
- West Asheville
- Woodfin

Types of new businesses:

- Food & Drink
- Attractions
- Arts/Cultural
- **Event Venues**
- Photographers
- Tours
- Lodging Retail
- Wellness
- Wedding Services

















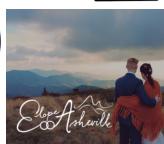


THE WELL







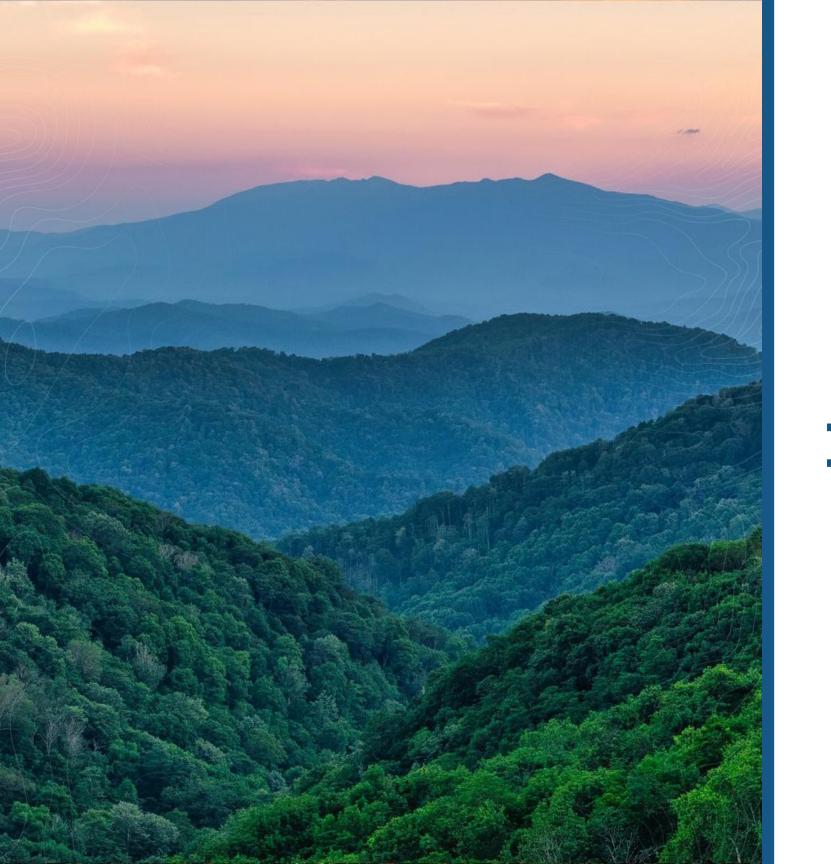












CULTURE & BUSINESS AFFAIRS Q4 INITIATIVES

Jennifer Kass-Green

Vice President of Culture & Business Affairs



Organization

ORGANIZATIONAL UPDATES

New Team Members



Kristen ChildersSales Manager

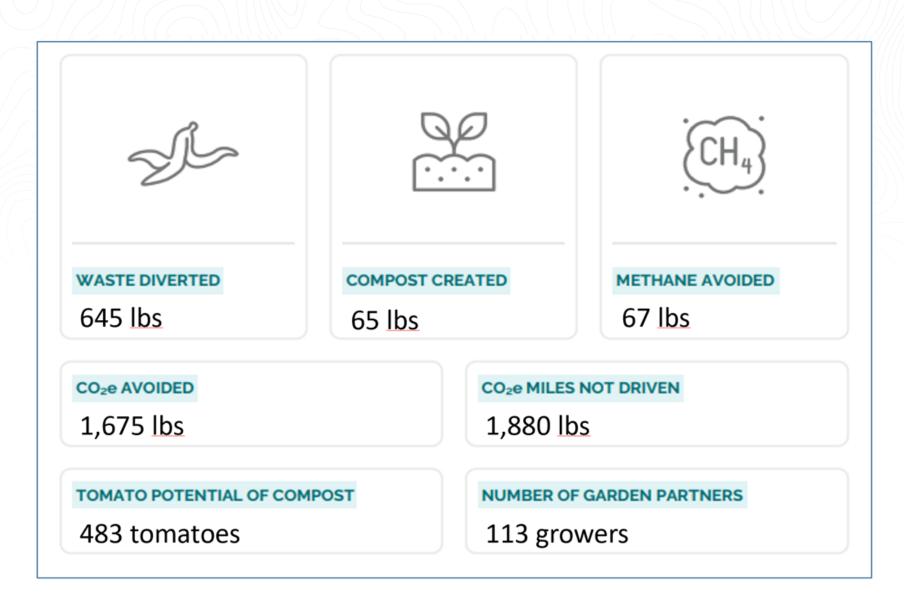


Karis RobertsMarketing Manager

Organization

COMPOSTING EFFORTS

FY25 Impact Report from CompostNow





Organization

VOLUNTEER TIME OFF (VTO)

Total Volunteer Hours + Organizations in FY25

- Asheville-Buncombe Technical Community College
- Asheville Community Theatre
- AVLFest
- Equal Plates Project
- Grassroots Aid Partnership
- Grateful Village
- Haywood Congregation
- Higher Ground Western Carolina Rescue Ministries
- MANNA FoodBank
- NC Craft Beverage Museum
- Skyview Golf Association
- Silverado's Disaster Relief Distribution Center
- Southern Conference
- United Way of Asheville and Buncombe County

117.50

Hours Volunteered

14

Non-Profit Organizations





Running a Healthy & Effective Organization

DESTINATIONS INTERNATIONAL IDENTITY WORKSHOP

Annual Social Inclusion Training

- Full-day on-site workshop on May 20
- Facilitated by Chief Impact
 Officer and Social Impact
 Manager for Destinations
 International
- Agenda included social identity and understanding exercises as well as discussion surrounding destination stewardship for a welcoming and inclusive community







BUSINESS DEVELOPMENT PERFORMANCE UPDATE

Michael Kryzanek, CHME
Explore Asheville | VP of Business Development

Colleen Swanson
Meetings Database Institute (MDI) | Executive Vice President





BUSINESS DEVELOPMENT OVERVIEW

Michael Kryzanek, CHME
Explore Asheville | VP of Business Development



GUIDING PRINCIPLES FOR BUSINESS DEVELOPMENT

To be additive, balanced, and aligned in our efforts

1

ADDITIVE

Focusing on new business and the quality of the visit 2

BALANCED

Pursuing and booking off-peak business throughout the year focusing on specific need periods

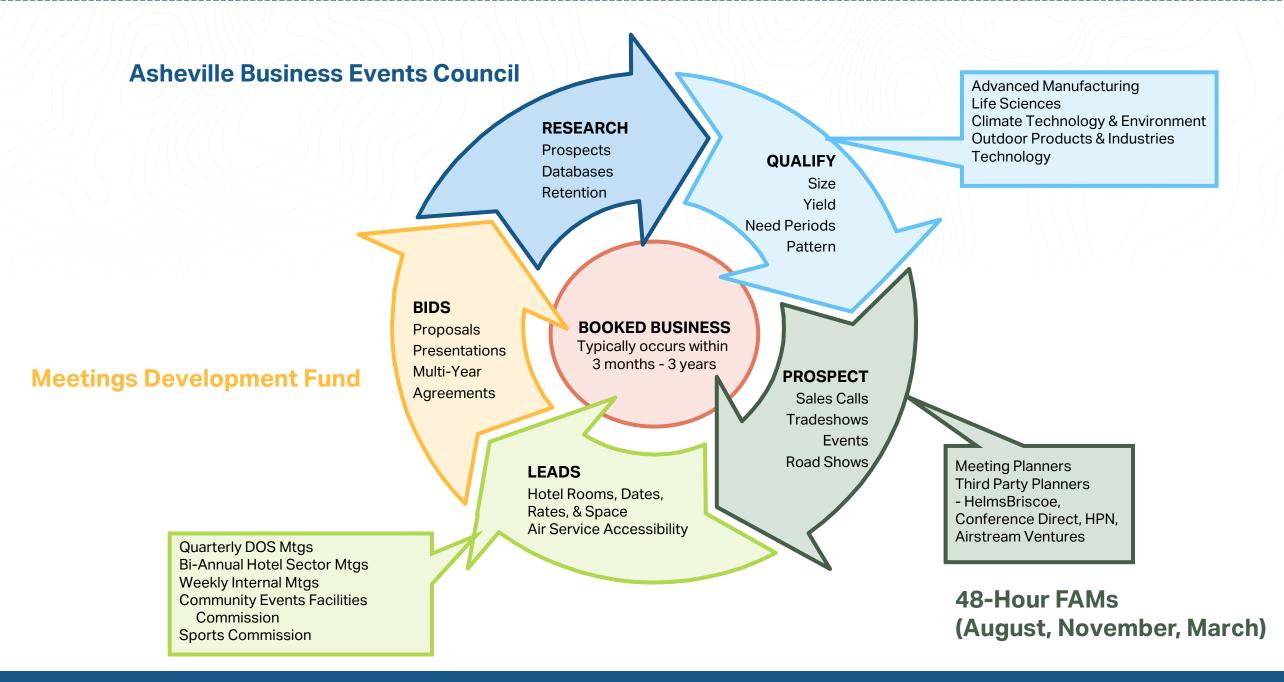
3

ALIGNED

Attracting business aligned with our strategic pillars, economic development sectors, and community assets



BUSINESS DEVELOPMENT CYCLE The process of securing group business for our destination





BUSINESS DEVELOPMENT TEAM



Michael KryzanekVP of Business Development

- Oversees, leads and coaches team
- Asheville Business Events Council and reputationbuilding events
- Finance and budget planning; contract management



Connie Nuckolls Holliday Director of Sales

- Directs day-to-day group sales efforts
- Manages third-party partnerships
- Fosters hotel, venue and service relationships
- Oversees Meetings Development Fund



Jay Curwen
Director of Sports, Film &
Entertainment

- Attracts and retains profitable opportunities in the sports, film and entertainment markets
- Develops and manages annual budget for sports, film & entertainment
- Maintains relationships with all Buncombe County sports venues



Tina Porter Senior Sales Manager

Nationwide Markets:

- Sports
- Health & Wellness
- Outdoor Products and Industries

Assigned states: AZ, CA, CO, IA, IL, ID, KS, MN, MT, NE, NM, ND, NV, OK, OR, SD, TX, UT, WA, WI, WY



BUSINESS DEVELOPMENT TEAM



Shawn BooneSenior Sales Manager

Nationwide Markets:

- Technology
- Manufacturing
- Food and Beverage
- Diversity, Equity and Inclusion

Assigned states: AL, AR, FL, GA, IN, KY, LA, MI, MS, MO, OH, SC, TN



Kristen ChildersSales Manager

Nationwide Markets:

- Life Sciences, Medical, Pharma, Health
- Climate & Environmental

Assigned states: AL, AR, FL, GA, IN, KY, LA, MI, MS, MO, OH, SC, TN



Khal KhourySales Manager

Nationwide Markets:

- Adventure Travel
- Weddings
- Group Tour
- Reunions
- SMERF (Social, Military, Education, Religious, and Fraternal Groups)



Emily CrosbyGroup Service Manager

- Manages exclusive service program for conferences and events once booked
- Plans and coordinates 48-hour FAM trips



BUSINESS DEVELOPMENT TEAM



Ali WainrightGroup Sales Coordinator

- Lead assignment, tradeshow and travel support
- CRM and economic impact calculator
- Administrative support



John DawsonGroup Service Coordinator

- In-market service delivery for groups and 48-hour FAM coordination
- Meetings Development Fund admin
- Administrative support



Mia BrownSales & Marketing Assistant

- CRM administration
- Visitor guide fulfillment
- Administrative support





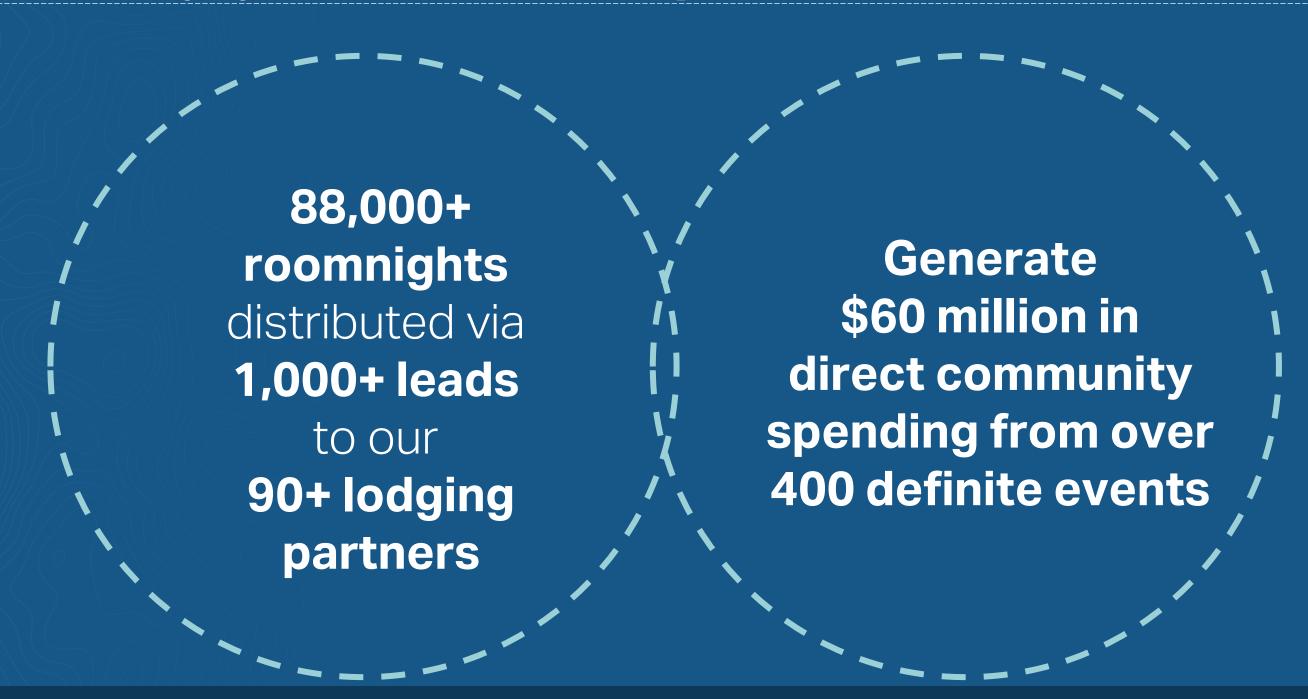
FY25 PERFORMANCE

Michael Kryzanek, CHME
Explore Asheville | VP of Business Development



FY25 GOAL

Annual roomnight goal set for the Business Development Team





BENCHMARKING EXPLAINED

Emphasis is placed on booking new business and roomnights in specific need periods

OFF-PEAK GROUPS

JANUARY - MARCH

WEEKNIGHT GROUPS

SUNDAY – THURSDAY



1.5 roomnights for every roomnight booked

REPEAT GROUPS



0.5 roomnights for every roomnight booked



1.5 roomnights for every roomnight booked

YEAR-OVER-YEAR PERFORMANCE

Fiscal Year 2025 vs. Fiscal Year 2024

2025 Benchmarked Roomnight Goal: 88,000+

	FY25	FY24	% Difference	
Roomnights (Raw/Unbenchmarked)	89,092	63,998	+39.2%	
Group ADR	\$204.41	\$225.02	-9.2%	
Events Booked	477	415	+15.0%	
Average Size (room night)	174	154	+13.0%	
Leads Issued to Hotel Partners	1,021	1,080	-5.5%	
Roomnights (Benchmarked)	115,393	83,140	+38.8%	

RECORD BREAKING PERFORMANCE IN A MOST CHALLENGING YEAR

- Total groups booked were 477 compared to 415 last year, a 15% increase.
- Total spending represented by these groups is estimated at \$67.4 million, compared to \$48.8 million last year, a 38% increase.
- New bookings: 389 groups were new bookings (80% of total annual bookings),
 representing 66,254 roomnights and estimated direct spending of \$46 million.
- Total number of unique properties that had definite bookings: 78



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COMPETITIVE MARKETS FOR ASHEVILLE GROUP BUSINESS

2025 January - June Data

Market	Occupancy	ADR	RevPAR	RevPAR % change over 2024
Buncombe County, NC	65%	\$146	\$95	-5.9%
Charleston, SC	72%	\$187	\$134	+3.0%
Savannah, GA	70%	\$152	\$106	-6.0%
Wilmington, NC	62%	\$145	\$90	+1.9%
Chattanooga, TN	59%	\$117	\$69	+0.4%
Myrtle Beach, SC	53%	\$129	\$68	-4.5%
Greenville, SC	73%	\$132	\$96	+13%

(source: STR, LLC)





IMPACT EVENT RECRUITMENT

Michael Kryzanek, CHME
Explore Asheville | VP of Business Development



ASHEVILLE BUSINESS EVENTS COUNCIL (ABEC)

An ongoing partnership with the Economic Development Coalition of Asheville-Buncombe County

ABEC provides opportunities for collaboration on destination promotional efforts and is targeted at attracting groups in the following strategic business sectors, which the EDC has identified as growth opportunities:

Advanced Manufacturing

Life Sciences

Climate Technology and Environment

Outdoor Products and Industries

Technology

Hosting meetings, conferences, and events associated with these business sectors can strengthen industry-specific supplier/customer relationships for local businesses, attract EDC prospects, and provide exposure for Asheville and Buncombe County to business decision makers

ABEC meetings this past fiscal year featured a presentation about Explore Asheville marketing efforts, a hard-hat tour of the new terminal at Asheville Regional Airport and a Strategic Recovery panel with Clark Duncan (EDC) and Dodie Stephens (Explore Asheville). Next month, ABEC will be held at the Grand Bohemian and Kara Irani, Biltmore Village Association will be our speaker.

ABEC members, representing target sectors, are asked to provide access and/or referrals to organizations, associations, and boards with business potential for Asheville in exchange for access to data/statistics and networking/promotional opportunities



CURRENT IMPACT EVENT RECRUITMENT 2025

Attracting groups and conferences as the front porch of economic development











Visit NC Tourism 365 Conference

March 15-18, 2026 \$610,000 800 room nights Government & Public Administration Tourism Cares
Meaningful Travel
Summit

March 17-21, 2026 \$160,000 250+ room nights Sustainability & Tourism

Outdoor Media Summit

Sept 25 – Oct 2, 2026 \$1.2+ million 800+ room nights Outdoor Industries & Products National
Environmental
Balancing Bureau
Annual Meeting

Oct 17-26, 2026 \$410,000 950 room nights Climate Technology & Environment Event Service Professionals Association

Jan 25-27, 2027 200+ attendees Event Professionals



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BOARD DISCUSSION

COMMENTS



EXPLOREASHEVILLE.COM



MEETINGS DATABASE INSTITUTE ANALYSIS

Colleen Swanson

Meetings Database Institute (MDI)
Executive Vice President



MEETINGS DATABASE INSTITUTE

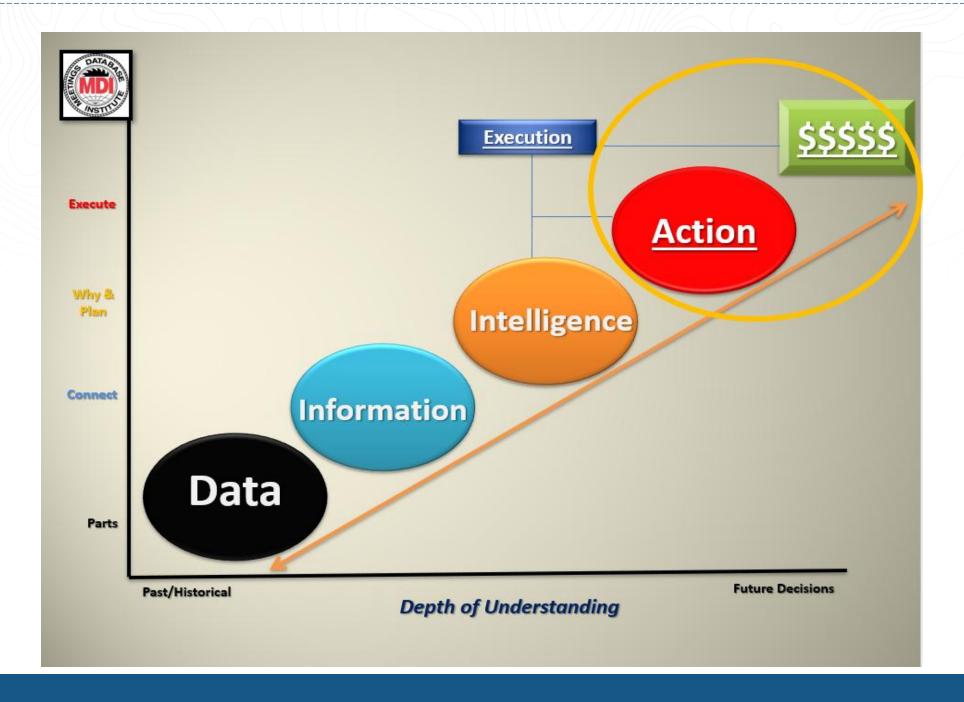


- Founded in 1994
- A strategic data management and solutions firm, specializing in the hospitality and meetings marketplace.
- Integrity, Intelligence and Impact
- Analyze and Manage over 4 Million Accounts
- \$35+ Billion Room Revenue
- 200 Million+ Roomnights
- Provide a clear roadmap of actionable database intelligence to increase revenue and impact.



DATA PATH TO SUCCESS









ASHEVILLE

FY2026 ARRIVALS (JULY 2025-JUNE 2026)

DEFINITES (CONTRACTED BUSINESS)





KEY PERFORMANCE INDICATORS (KPIS)

FY 2026 Arrival Definites (Contracted)

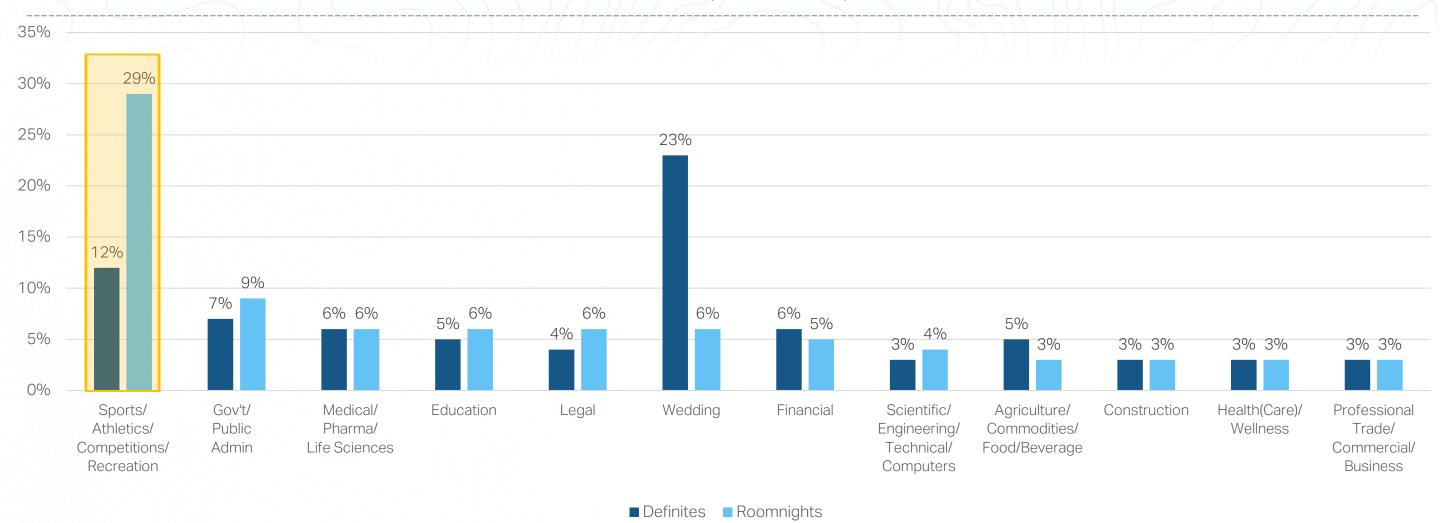
- Market Segments
- Feeder States
- Sizes Peak Rooms
- New vs. Repeat
- Time of Year Arrival Months
- Lead-Times: (Created to Arrival)
- Weekday/Weekend Day of Week





MARKET SEGMENTS

FY 2026 Arrivals
Definites (Contracted)



Many different Market Segments coming into Asheville in FY2026 with sports groups booked by Explore Asheville continuing to be the key definite roomnight driving segment followed by Government/Public Administration - Medical/Pharma/Life Sciences - Education and Legal rounding out the top 5 producing segments. Healthy variety of segments making impact. Weddings are the key *quantity* of definites driver.

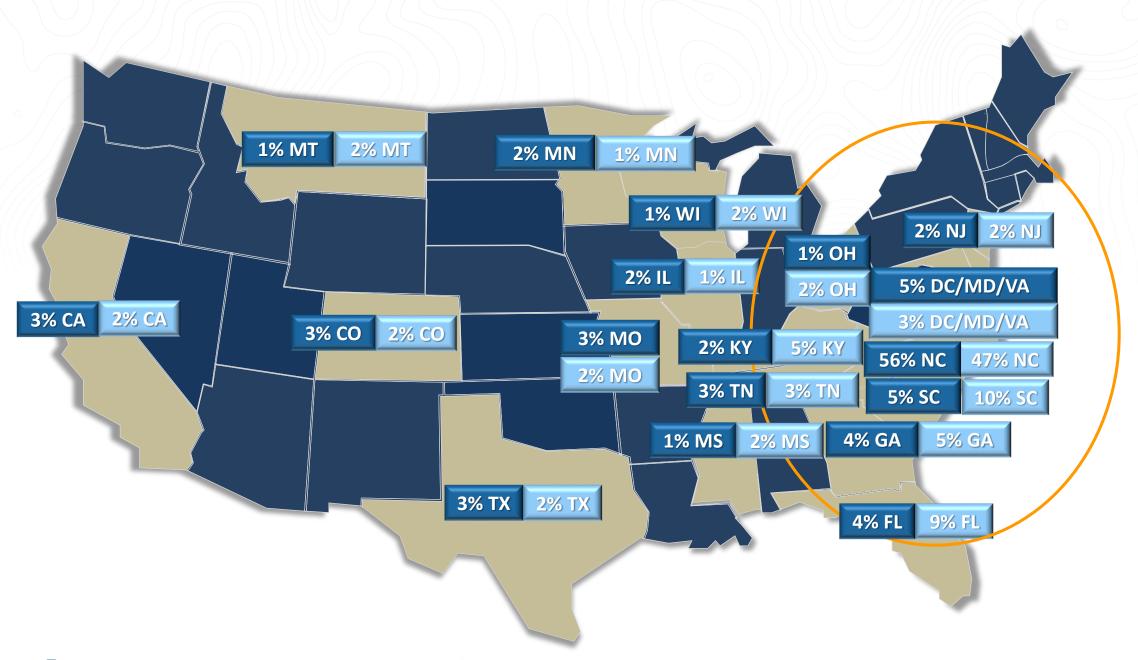


ACCOUNT FEEDERS



FY 2026 Arrivals

Definites (Contracted)





Regional impact, and significant roomnights from groups located in the state of North Carolina.
Consistent.

South Carolina = Southern Conference large sports group driving over half (68%) of the roomnights coming from SC. Florida impactful roomnight driver along with Georgia.

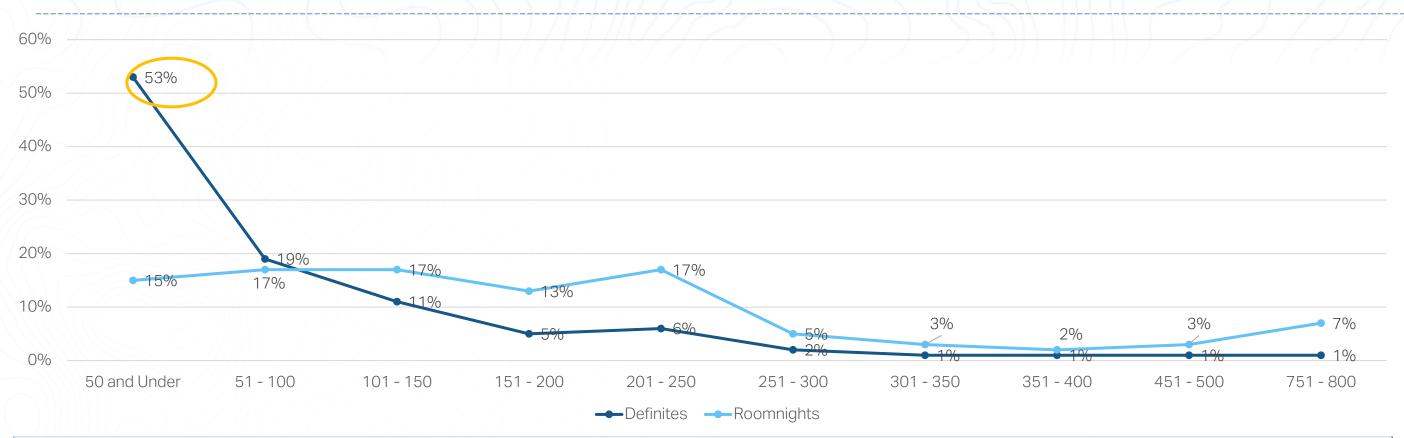


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PEAK ROOMS

FY 2026 Arrivals
Definites (Contracted)



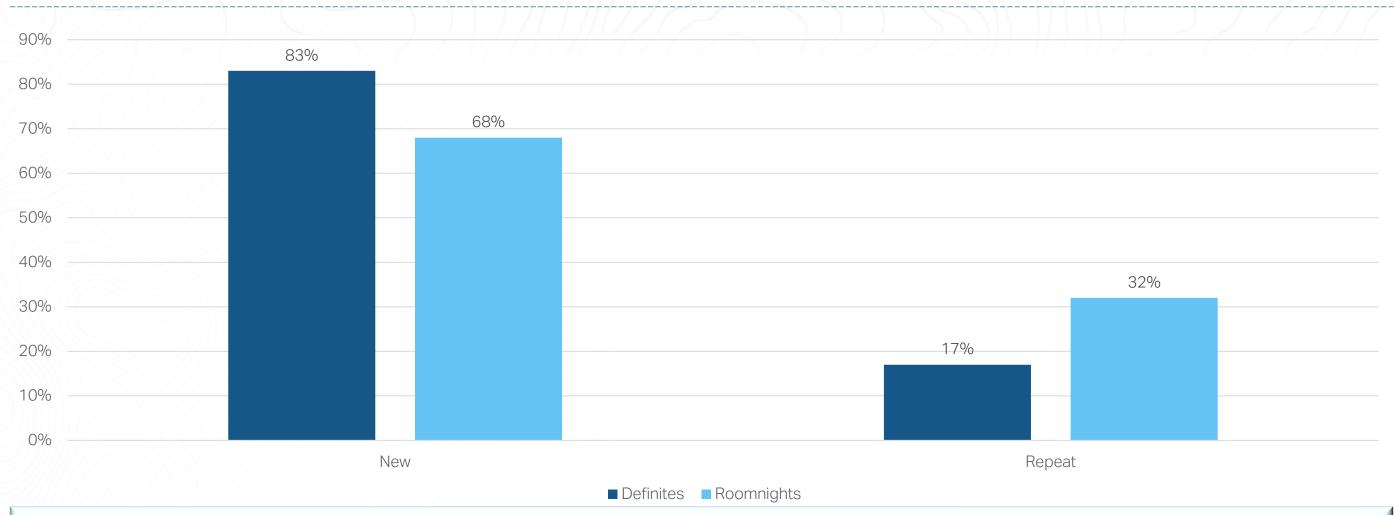
Peak Rooms showing a significant quantity of business in the 50 peak or under room category. This category drives 53% of the definite transactions and 15% of the roomnights contracted to arrive in Asheville during FY 2026.

There is a healthy mix of business across various peak room sizes, up to 250 peak, coming into Asheville in FY2026. 20% of the groups coming into the market in FY2026 are from groups with over 250 rooms on peak night and result from 6% of the definite transactions. Good impact of roomnights across many different size groups.



NEW VS. REPEAT

FY 2026 Arrivals
Definites (Contracted)



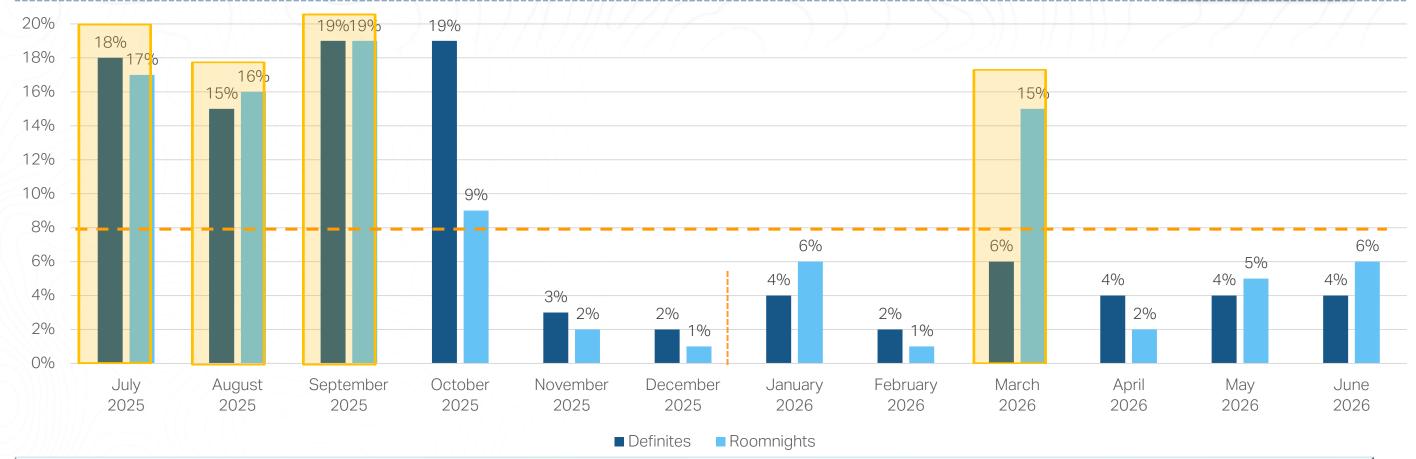
Quantity of New Business coming into the destination in FY2026 remains high (83%) and represents 68% of the roomnights. Much smaller quantity of Repeat business coming into the market in FY2026 vs. New business, and, also making an impact regarding roomnights.



ARRIVAL MONTH

FY 2026 Arrivals Definites (Contracted)





Arrival Months are weighted to heavy first-half of FY2026 due to lead-time booking cycles (lead created to arrive date). Peak arrival months are showing to be July, August and September. March 2026 showing strong due to Southern Conference.

Good volume of *quantity of groups* for September and October, as well as July and August.

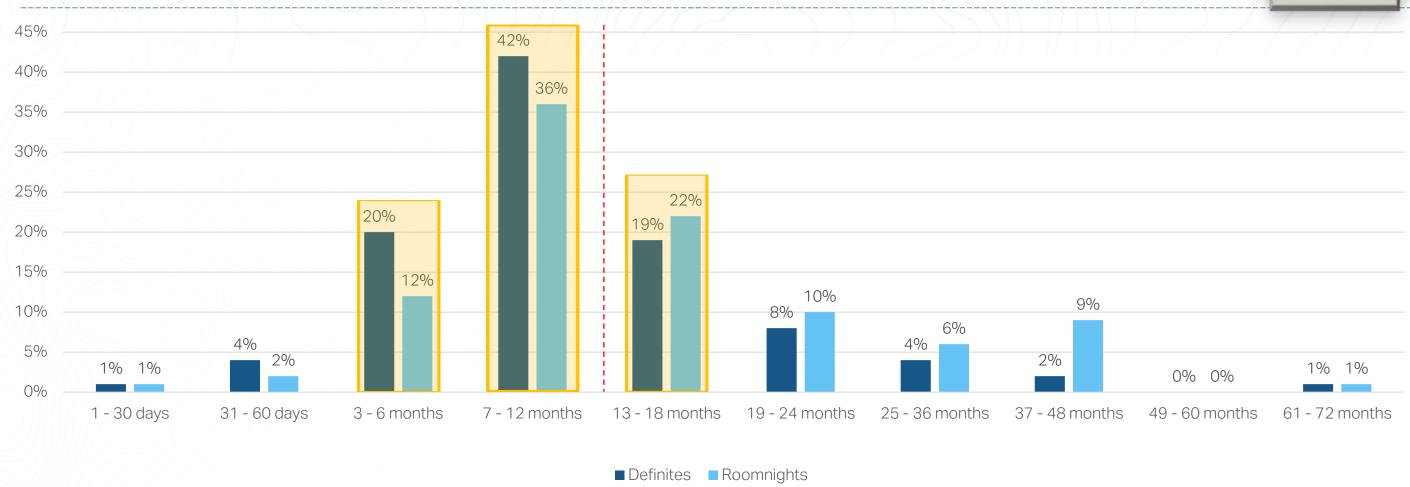
As we progress through FY2026 more business will be contracted with arrival dates in the second half of fy2026 (Jan-June 2026).



LEAD-TIME: TURNED DEFINITE TO ARRIVAL DATE

FY 2026 Arrivals Definites (Contracted)





As we move into FY2026 we see 7-12 months (turned definite (contracted) date to arrival date) is most prevalent lead-time category, followed by 13-18 months.

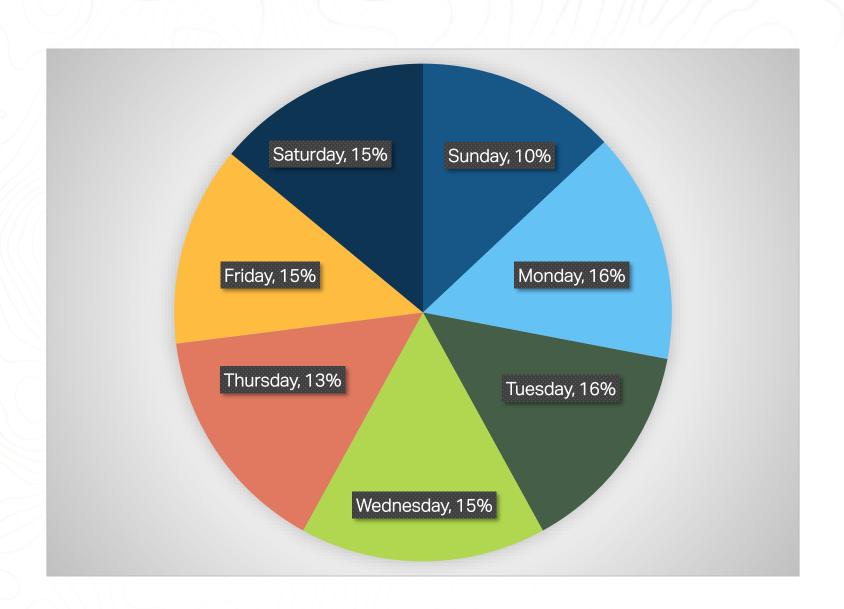
71% of the definites representing 51% of the roomnights fall within a 12 month turned definite to arrival date. 49% of the roomnights, 29% of the definites resulting from groups with lead-times greater that 12 months.



WEEKDAY VS. WEEKEND - DAY OF WEEK

FY 2026 Arrivals
Definites (Contracted)





Great spread of roomnights for all days of the week with double-digit percentage of roomnights contracted for each day of the week.

Day of Week impact is a key performance metrics as Explore Asheville continues to impact all days of the week with special focus on weekday business.



KEY SUMMARY POINTS

FY 2026 Arrivals

Sports/Athletics/Recreation/Competition - strongest segment. *Southern Conference accounting for 24% of the roomnights resulting from Sports. Government/Public Administration, Medical/Pharma/Life Sciences, Education and Legal round out top 5 producing segments. Financial and Scientific/Engineering/Tech/Computers also impactful segments. Weddings result in the largest volume of definites. North Carolina consistently the strongest feeder state. South Carolina impact through Southern Conference which represents 68% of the contracted roomnights from SC. Florida also showing significant roomnight impact as well as Georgia. Healthy spread of groups across many peak room sizes are coming into Asheville in FY2026. Volume of definites resulting from smaller meetings (under 50 rooms peak = 53%). Over 50% of roomnights contracted to arrival in FY2026 fall into the months of July, August and September. Back-half of FY2026 will fill in with in-year-for-year groups. Lead-times (turned definite to arrival) show strong volume of definites (71%) are within a 12-month period representing 51% of the roomnights. All days of week significantly impacted with roomnights for FY2026. 70% of roomnights are for weekday arrivals (Sun-Thu).

THANK YOU!



Turning Data into Intelligence and Intelligence into Action

2800 S. River Road, Chicago, IL. 60018 (847) 803-6341





COUNTY UPDATES

Commissioner Terri Wells





MISCELLANEOUS BUSINESS

HP Patel
BCTDA | Vice Chair



Buncombe County Tourism
Development Authority



PUBLIC COMMENTS

HP Patel
BCTDA | Vice Chair



Buncombe County Tourism
Development Authority

LIVE VIRTUAL PUBLIC COMMENTS

Vice Chair HP Patel

Members of the Public were invited to sign-up to virtually share live comments during today's in-person BCTDA meeting.

As of the 12:00 p.m. registration deadline on Tuesday, July 22, no requests to speak had been received.



LIVE VIRTUAL PUBLIC COMMENTS

Vice Chair HP Patel

Upon arrival to this morning's BCTDA meeting, anyone who indicated a desire to make public comments completed the Public Comment Sign-In Sheet, affirming they agree to abide by the Rules of Decorum.



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A FEW REMINDERS

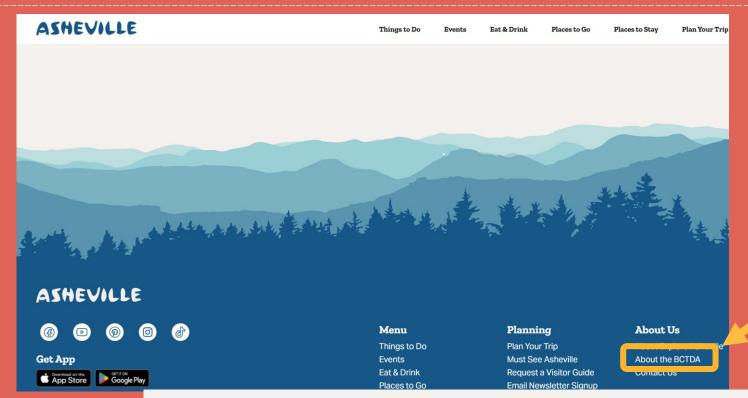
Vice Chair HP Patel

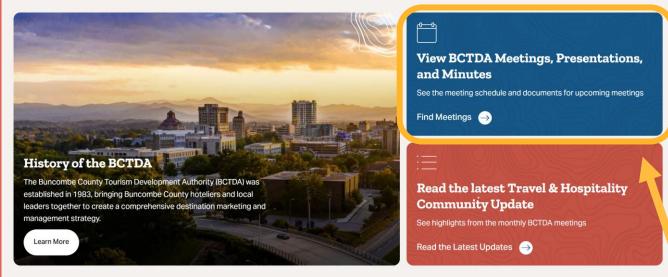
Additional materials, including the PowerPoint presentation, will be posted online later today.

The next BCTDA meeting will be held on Wednesday, August 27, 2025, at 9:00 a.m. at the Asheville Art Museum.

For more information go to:

- ExploreAsheville.com
- About the BCTDA section
- View BCTDA meetings, presentations, and minutes





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ADJOURNMENT

Vice Chair HP Patel

Questions/Comments

Suggested Motion:

Motion to adjourn the BCTDA Meeting.

Motion Second

Discussion

Vote



