Welcome!

July 13, 2022
Word of The Moment..
Dealing With Headwinds

- Half of American travelers (49.5%) say high travel prices have kept them from traveling in the past month, jumping nearly 8-points in the last four weeks.**

- The pandemic’s impact on travel plans continues to wane as a survey-high 43% of American Travelers now say that it no longer has any impact on their decision to travel.*

- Well over one-third (36.3%) agree that recent inflation in consumer prices has caused them to cancel an upcoming trip—a 6-point increase in the last month.**

- High gas prices may impact travel, with more than 44% up from 36% in May saying it may cause them to take fewer road trips this year*

*Longwoods International ** Destination Analyst
Impact On Travel

Factors Impacting Decisions to Travel in Next Six Months

- Coronavirus/COVID-19:
  - 25%: 1
  - 17%: 2
  - 21%: 3
  - 19%: 4
  - 19%: 5

- Concerns about my personal financial situation:
  - 11%: 1
  - 9%: 2
  - 23%: 3
  - 26%: 4
  - 31%: 5

- Transportation costs:
  - 9%: 1
  - 7%: 2
  - 21%: 3
  - 29%: 4
  - 34%: 5

Travel Sentiment Study Wave 63
Dealing With New Headwinds

- Nearly 43% of American travelers say they have elevated levels of concern about their **personal safety** when thinking about traveling domestically. Top concerns theft (36.7%) and mass shootings (34.0%) *

- Of the nearly three-in-ten (28.6%) travelers who visited a destination with a **significant homelessness** issue in the last 12 months, 40.6% said what they experienced made them less likely to return to specific destinations and a larger 46.3% said they were less likely to recommend that destination to friends/relatives.*

- Several **flight cancelations** and causing disruptions

* Source: Destination Analysts & USTA
Question: Overall, how close to “normal” is the U.S. in terms of resuming leisure activities (dining out, travel, etc.)?

Source: *Longwoods International ** Destination Analyst
DEN Continues To Be A Bright Spot

4th Best Recovery of Major Airports

Source: DEN passenger traffic reports; Individual airport websites
3rd Busiest in the World

10 Busiest Airports in the World
January – April 2022

<table>
<thead>
<tr>
<th>Rank</th>
<th>Airport</th>
<th>YTD Apr. 2022 Total Passengers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Atlanta (ATL)</td>
<td>27,939,117</td>
</tr>
<tr>
<td>2</td>
<td>Dallas/Ft. Worth (DFW)</td>
<td>21,073,424</td>
</tr>
<tr>
<td>3</td>
<td>Denver (DEN)</td>
<td>19,934,118</td>
</tr>
<tr>
<td>4</td>
<td>Chicago-O’Hare (ORD)</td>
<td>19,098,152</td>
</tr>
<tr>
<td>5</td>
<td>Los Angeles (LAX)</td>
<td>18,688,191</td>
</tr>
<tr>
<td>6</td>
<td>Dubai (DXB)</td>
<td>18,494,948</td>
</tr>
<tr>
<td>7</td>
<td>Miami (MIA)</td>
<td>16,899,327</td>
</tr>
<tr>
<td>8</td>
<td>Delhi (DEL)</td>
<td>16,826,457</td>
</tr>
<tr>
<td>9</td>
<td>Orlando (MCO)</td>
<td>15,978,458</td>
</tr>
<tr>
<td>10</td>
<td>Istanbul (IST)</td>
<td>15,812,680</td>
</tr>
</tbody>
</table>

Source: ACI; Note: Totals are preliminary and subject to change

DEN Nonstop Destinations

<table>
<thead>
<tr>
<th>Period</th>
<th>Jul 2022</th>
<th>YTD Jul 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td>185</td>
<td>189</td>
</tr>
<tr>
<td>International</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Total Destinations</td>
<td>210</td>
<td>214</td>
</tr>
</tbody>
</table>

Source: DEN passenger traffic reports; Individual airport websites
Travel Demand Remains High

Travelers with Travel Plans in the Next Six Months Comparison

Travel Sentiment Study Wave 63

Longwoods International | miles partnership

VISIT DENVER
Travel Priorities

Question: Thinking about your travel during the NEXT TWELVE (12) MONTHS, what travel experiences will you prioritize?

- Spending time with loved ones: 76.6%
- New places I haven’t visited before: 57.2%
- Enjoying nature: 57.0%
- Getting away from crowds: 48.9%
- Budget travel: 48.1%
- Excitement and energy: 47.9%
- Bucket list travel: 41.6%
- Visiting cultural institutions: 33.5%
- Visiting theme parks: 32.9%
- Visiting large cities: 32.2%
- Luxury travel: 29.2%
- Staying close to home: 27.3%
- Attend sporting events: 26.7%

Source: Destination Analysts
All but four top markets above 75% of 2019 occupancy levels

Occupancy indexed to same TTM period in 2019, TTM May 2022

San Francisco, CA  64.6
Minneapolis, MN  64.6
New York, NY  87.7
Washington, DC  87.7
Boston, MA  99.6
Chicago, IL  99.6
Seattle, WA  99.6
Oahu Island, HI  99.6
Philadelphia, PA  87.7
Orange County, CA  87.7
Orlando, FL  87.7
New Orleans, LA  87.7
Saint Louis, MO  87.7
Los Angeles, CA  87.7
Detroit, MI  87.7
Denver, CO  87.7
San Diego, CA  87.7
Nashville, TN  87.7
Atlanta, GA  87.7
Houston, TX  87.7
Dallas, TX  87.7
Miami, FL  87.7
Phoenix, AZ  87.7
Norfolk/Virginia Beach, VA  87.7
Tampa, FL  87.7

Source: CoStar STR
Twelve major markets’ ADR above 2019 levels

ADR indexed to same TTM period in 2019, TTM May 2022

Source: CoStar STR
DIA, South and West Driving Market
Occupancy Recovery

May 2022 TTM occupancy, by submarket

Source: CoStar STR
DIA and West ADR Above 2019 Levels

May 2022 TTM ADR, by submarket

TTM ADR

- DIA/East
- CBD
- North
- South
- DTC
- West

TTM ADR, Indexed to TTM 2019

- DIA/East
- CBD
- North
- South
- DTC
- West

Source: CoStar STR
CBD And DTC Lag Rest of Market in Returning to 2019 Levels

May 2022 TTM RevPAR, by submarket

Source: CoStar STR
Pipeline Properties Concentrated in Downtown & Airport

May 2022, Pipeline Rooms, Denver, CO Market

Source: CoStar STR
Metro Group Occupancy: 2022/2021/2019

Metro Denver
June YTD

Source: VISIT DENVER Costar STR Data
CBD Group Occupancy: 2022/2021/2019

Downtown Denver
June YTD

Jan  2.3%  4.8%  0.0%
Feb  2.7%  8.6%  10.0%
Mar  3.3%  15.0%  20.0%
Apr  3.3%  19.4%  30.0%
May  7.8%  20.7%  40.0%
Jun  8.0%  20.7%  35.7%
Jul  8.0%  13.6%  26.2%
Aug  13.5%  25.6%  27.7%
Sep  15.7%  30.9%  29.5%
Oct  17.9%  34.1%  35.7%
Nov  8.5%  19.8%  34.1%
Dec  7.9%  10.5%  19.8%

Source: VISIT DENVER Costar STR Data
Business Travel

- More than two-thirds of executives expect their company will **spend less on business travel** over the next six months compared to the same period in 2019.

- Half of companies still have **policies in place restricting business travel**. One third of business travelers and executives see reduced business travel as negatively impacting their company's financial performance.

- Executives consider business travel essential (73%), but report that virtual meetings (75%), cost controls (69%) and remote work by customers (69%) are likely to **continue to constrain business travel**.

- In the coming quarters, companies will make travel decisions in a business environment that is **adjusting to increased interest rates and high inflation**, as well as **labor shortages and supply chain challenges**.

Source: USTA
Trending

- **Environment** - More American travelers are exhibiting an environmental consciousness. Now 56.1% say they usually make an effort to limit their personal impact on the environment when traveling (up from 53.5% in May).

- **International Travel** - With negative COVID tests no longer a requirement to enter the U.S., American travelers’ likelihood to travel internationally this year jumped to 34.3% from 28.4% in the past month alone.

- **Remote Work** - American travelers are beginning to shift away from remote work while away from home with 60% now saying they do not plan to work remotely while away from home. This is an increase of 11 points from last December.*

*Source: Destination Analysts*
Future is Bright

- Denver International Airport
- Strong fly and drive markets
- Healthy outdoor City and State
- Great visitor destination appeal and high demand
- Year-round marketing
- Continued investment in tourism infrastructure (Go Bonds and $7B in investments)
- Strong business environment
- Outstanding convention product & expansion underway
- Positive meeting planner perceptions of Denver
Rachel Benedick
Executive Vice President,
Sales & Services
DEI Focus Areas

14-member voluntary Board committee to review five areas of Visit Denver efforts:

- Commitment to Diversity, Equity & Inclusion
- Internal Policies & Practices
- Community Affiliations & Support
- Social Impact/Work Force Development
- Marketing & Content
DEI Commitment

At VISIT DENVER, we believe that travel makes the world a smaller and more connected place. It brings people together and fosters interaction among diverse cultures. It builds understanding, appreciation, empathy and respect for one another. This core philosophy is a big part of who we are as a community and why Denver is one of the top destinations in the country to live and to visit.

The Mile High City embraces and celebrates people of all races, ethnicities, abilities, gender identities and sexual orientation. We believe that Black lives matter and we reject any form of racial injustice. We also acknowledge that there remains a long road ahead to achieve true equity for all historically oppressed communities.

With this in mind, VISIT DENVER is pledging a renewed sense of awareness and action to create change, both within our organization and in our city. While VISIT DENVER has consistently supported diversity, equity and inclusion, we also believe that we can, and we must, do better. We are committed to making these core values a way of life for our organization, our partners in the hospitality industry and our visitors.
DEI Staff Focus Areas

- **Outward Mindset Training**
  - Leadership
  - Full Staff
  - Ongoing for new team members

- **DEI Survey**
  - Determine Opportunity Areas
  - Impact Committees

- **Training**
  - Historical Roots of Oppression
  - Unconscious Bias
  - Micro-aggressions
  - Outward Mindset 2.0
2022 Q3 – Q4 CCC

- American Association of Law Libraries
  July 16 – 18; 2,100 attendees

- LPL Financial
  July 24-27; 7,000 attendees

- National Conference of State Legislatures
  August 1-3; 6,000 attendees

- Confidential Corporate
  August 10-12; 7,000 attendees

- Quility Holdings
  August 18-19; 4,000 attendees

- American Railway Engineering And Maintenance-of-Way Association
  August 28-30; 3,000 attendees

- True Value Company
  September 16-18; 7,500 attendees

- Emergency Nurses Association
  September 29-October 3; 3,700 attendees

- GABF
  October 6-8; 3,500 attendees

- Geological Society of America
  October 9-12; 7,000 attendees

- LeadingAge
  October 16-19; 8,500 attendees

- EDUCAUSE
  October 25-27; 6,000 attendees

- Charles Schwab
  November 1-4; 4,000 attendees

- Society of Biblical Literature and American Academy of Religion
  November 18-22; 9,000 attendees

45,000+

38,000
Convention Trends

- Large Citywides continue to reduce attendance
- Segments impacted differently (medical, corporate, etc.)
- Demand is high & booking window remains short for small and midsize groups
- Corporate = persnickety
- Response times are a challenge
Less Patience, Higher Expectation

When traveling in the next three months, what level of service do you expect to receive from tourism and hospitality businesses?

- The same level of service as before the pandemic: 52%
- A higher level of service than before the pandemic: 28%
- A lower level of service than before the pandemic: 20%

Travel Sentiment Study Wave 63
VISIT DENVER % of Total Compared to 2019 Leads

Source: VISIT DENVER
Sites On The Rise

Site Tours
Sales & Destination Services Q1 and Q2 Comparison

Source: VISIT DENVER
Back On Target For Conventions

Convention Booking Pace

Source: VISIT DENVER
Public Safety Issues

Both attendees and planners find the level of crime in the destination and the perceived lack of safety response/adequate law enforcement resources in the destination important in impacting the decision to attend/plan a meeting. These items are significantly more important to planners than attendees.

- The level of crime in the destination: Attendee 75%, Planner 56%
- The perceived lack of safety response/adequate law enforcement resources in the destination: Attendee 60%, Planner 68%
- Recent large-scale protests in the destination: Attendee 58%, Planner 54%
- Public discussion of defunding the host city's police department: Attendee 48%, Planner 35%

Question: When selecting a destination to host a meeting, conference, or convention, to what extent does each of the following public safety (non-COVID) issues impact your decision?
Importance of In-Person Meetings

The majority of planners felt that meeting in-person was Extremely Important, attendees thought it was important but not near as important as the planners.

Attendees’ Question: In order for you to consider it time and money well spent, how important do you believe it is for attendees like yourself to meet in-person with other attendees as part of the meetings/conferences/conventions you attend? Planners’ Question: How important do you believe it is for attendees to meet in-person with other attendees as part of the meetings/conferences/conventions you plan?
Meeting and Event Recovery Expectations
- Association Meetings and Conventions-

/ Question: Thinking specifically about your book of business, in what timeframe do you expect each of the following meeting segments will return to at least the same volume of meetings as they did pre-COVID?
54% of attendees had extended their business travel for a conference or convention for a leisure visit in the host destination in the past 24 months.

56% of travelers said they are likely to extend their trip in next 12 months for leisure purposes.

How likely are you to extend a business trip in the next 12 months for personal/leisure purposes (i.e. non-business activities) either before or after a conference or convention?

- 5=Extremely Likely: 27% (Wave 1), 28% (Wave 2)
- 4: 28% (Wave 1), 28% (Wave 2)
- 3: 23% (Wave 1), 27% (Wave 2)
- 2: 10% (Wave 1), 9% (Wave 2)
- 1=Extremely Unlikely: 4% (Wave 1), 4% (Wave 2)

Don’t expect to travel for business in the next 12 months: 8% (Wave 1), 5% (Wave 2)

Source: A Portrait of Meeting & Convention Travel Wave 2 Base: Attendees (W1=823, W2=962)
MMGY – Denver

Level of Appeal – Attendees vs Planners – Wave 2

// Question: Relative to other metropolitan cities, how appealing would you find planning/attending an in-person conference or convention in Denver?
How Can DMOs Help?

What can Destinations do to better meet the needs of the planning professionals in the future?

- Communications & Responsiveness
- Flexible & Understanding
- Update and Honest
- Staffing & Service Levels

Source: MMGY
### 2022 National Independent Study

459 meeting professionals evaluating the top 40 convention cities

**Pick the cities that best fit your selection criteria for primary consideration for your biggest meeting over the next 1-8 years.**

<table>
<thead>
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<td>Denver</td>
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**Based on industry “buzz” which city are providing the most positive overall experience for major conventions?**

<table>
<thead>
<tr>
<th>Rank</th>
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<tbody>
<tr>
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<td>2</td>
<td>San Diego</td>
</tr>
<tr>
<td>3</td>
<td>Denver</td>
</tr>
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</table>

**Select the most recent eight (8) cities in which you have held a major meeting.**

<table>
<thead>
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<tbody>
<tr>
<td>1</td>
<td>Orlando</td>
</tr>
<tr>
<td>2</td>
<td>Denver</td>
</tr>
</tbody>
</table>

**DMO/CVB that have pitched or made a proposal to your organization in the past 12 months?**

<table>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Denver</td>
</tr>
</tbody>
</table>

*Source: Evidenz*
Sports

- Continue to solicit and attract high profile events
- Denver left out of official list of FIFA World Cup host cities; bid committee proud of “financially responsible” bid
- Denver still being considered for future CONCACAF international soccer matches; DSGP just hosted the US Women’s team vs. Colombia
- Planning underway for the NCAA Men’s Basketball at Ball Arena in March 2023
- Denver hosting the international rugby match of USA v Chile this Saturday at Infinity Park
- USA Volleyball close to signing multiple years of events in Denver!
Colorado Convention Center Expansion

Overview

- 80,000 square foot ballroom
- 35,000 square foot pre-function space
- 20,000 square foot terrace
- Completed end of 2023
Colorado Convention Center Expansion

- 1st confirmed group: American College of Surgeons, July 2024
- Pediatrics, September 2025: 1st group to require it
- Increasing demand for the new space!
Flavia Light
Vice President, Tourism
Tourism Focus

- International Sales & Marketing
  - Denver International Airport
  - Colorado Tourism Office, Brand USA, The Great American West
  - Travel Trade Companies
  - Airlines

- Domestic Leisure Groups Support

- Arts & Culture Support and Promotion

- Tourist Information Centers
  - Denver Union Station
  - Colorado Convention Center
Tourism Initiatives

Attraction Passes
- Denver CityPASS
- Mile High Culture Pass

City-Wide Hospitality Training
- Go the EXTRA Mile!
  - Focuses on customer service and knowledge of Denver for front-line employees
  - Hybrid approach (online and in-person)
Tourism Updates

- **Support of Local Events:**
  - Independence Eve Fireworks, July 3
  - Fan Expo, July 1-3
  - Cherry Creek Arts Festival, July 1-3
  - Chicano Music Festival & Auction, 7/27-7/31
Tourism Updates

Upcoming Marketing Exposure

- Air France July
- Hotelbeds/Bedsonline B2B focus on the Americas and UK
- Televisa B2C focus on Mexico
- Expedia B2C focus on Canada
- Expedia B2C focus on Mexico (for Winter Travel)

Upcoming International Presence

- Colorado Tourism Office (CTO) Australia Sales Blitz Sponsorship - August
- Brand USA Travel Week in Frankfurt - September
Justin Bresler
Vice President, Marketing & Business Development
2021 Visitor Study Results

- Strong overall performance, particularly in overnight leisure market
- Visitation is strong from advertising markets
- ROI study shows strong performance of summer marketing
- 2022/2023 headwinds persist...but we’ll push through!
2021 Denver Travel Market

Total Size of Denver 2021 Domestic Travel Market

Total Person-Trips
31.7 Million
+14.5% vs. last year

Day 48% 15.1 Million
Overnight 52% 16.6 Million

2020: 27.6 Million

Total Expenditures for Denver 2021 Domestic Travel Market

Total Spending
$6.6 Billion
+26.2% vs. last year

Day 17% $1.1 Billion
Overnight 83% $5.5 Billion

2020: $5.3 Billion

Source: Longwoods International Travel USA® 2021 Denver Report
2021 All Overnight Visitors

Source: Longwoods International Travel USA® 2021 Denver Report
2021 Overnight Leisure Visitors

Source: Longwoods International Travel USA® 2021 Denver Report
2021 Feeder States and Cities

Top Feeder States (not Colorado)

- Texas – 11%
- California – 10%
- Florida – 6%
- Arizona – 3%

Top Feeder Cities (not Colorado)

- Los Angeles, CA – 5%
- Dallas-Ft. Worth, TX* – 3%
- New York, NY – 3%
- Albuquerque-Santa Fe, NM* – 2%
- Chicago, IL* – 2%
- Houston, TX* – 2%
- Orlando-Daytona Beach-Melbrn, FL – 2%

*Denotes VISIT DENVER advertising market

Season of Trip
Total Overnight Person-Trips
Base: 2021 Overnight Person-Trips

- Jan - Mar: 21%
- Apr - Jun: 24%
- Jul - Sep: 29%
- Oct - Dec: 25%

Past Visitation to Denver

- 79% of overnight travelers to Denver are repeat visitors
- 52% of overnight travelers to Denver had visited before in the past 12 months

Source: Longwoods International Travel USA® 2021 Denver Report
2021 Overnight Trip Expenditures

Domestic Overnight Expenditures - by Sector

- Lodging: 28% ($1,535 Million, +31.4%)
- Transportation at Destination: 33% ($1,823 Million, +26.9%)
- Restaurant Food & Beverage: 18% ($974 Million, +33.1%)
- Retail Purchase: 13% ($700 Million, +25.4%)
- Recreation/Entertainment: 9% ($497 Million, +31.0%)

Average Per Person Expenditures on Domestic Overnight Trips - by Sector

- Transportation at Destination: $110
- Lodging: $92
- Restaurant food & beverage: $59
- Retail Purchase: $42
- Recreation/ Sightseeing/ Entertainment: $30

Average Per Person: $333

Last year: $319

Average Per Person:
- Leisure: $325
- Business: $426

Source: Longwoods International Travel USA® 2021 Denver Report
88% of overnight travelers were very satisfied or somewhat satisfied with their overall trip experience.

Source: Longwoods International Travel USA® 2021 Denver Report
2021 Summer Campaign ROI

Source: Longwoods International 2021 Denver Return on Investment Report
Every $1 invested in the 2021 VISIT DENVER summer advertising campaign generated $151 in direct visitor spending and $17 in taxes.

Source: Longwoods International 2021 Denver Return on Investment Report
The State of the Travel Industry

- COVID is receding as a travel concern, replaced by concerns with inflation and travel prices

- Vast majority are in a “travel state of mind”

- Excitement for travel and travel inspiration remains high!

- Domestic demand for overseas travel presents a potential challenge
Travel State of Mind

- I'm already traveling: 28.3%
- I'm ready to travel, with no hesitations: 27.1%
- I'm ready to travel, but feel some hesitation: 29.2%
- I need a little more time to be ready to travel: 9.9%
- I need a lot more time to be ready to travel: 5.5%

(Base: All respondents, 4,002 completed surveys.
Data collected June 15-23, 2022)

Source: Destination Analysts, State of the American Traveler Report, July 6, 2022
Excitement for Leisure Travel

Source: Destination Analysts, State of the American Traveler Report, July 6, 2022
Openness to Travel Inspiration

Source: Destination Analysts, State of the American Traveler Report, July 6, 2022
International Travel Likelihood

Source: Destination Analysts, State of the American Traveler Report, July 6, 2022
Current Campaigns – June Results

**Spring/Summer: 104 million impressions**

**Regional Events: 16 million impressions**

**Basecamp: 2.9 million video views**

**Metro: 5.3 million impressions**

**OTA Co-op: 16k room nights**

**Business as Unusual: 1.9 million impressions**
Allison Kohn
Director, Government & Community Affairs
Public Policy Update

- RTD offering free rides in August as result of state legislation
- Taxes on ride sharing and DoorDash/UberEats
- DEN planning aggressive growth this year
- Colorado economic outlook
  - TABOR refund in August
- Downtown Denver Recovery Efforts
  - Small Business Recovery Program
  - Popups
Upcoming Elections

- 2023 City Council and Mayoral Elections
  - 1/3 of council will be new and Mayor Hancock is term-limited
  - Fair Election Fund

- Monitoring Colorado and Denver election in November
  - Statewide and Denver-specific ballot initiatives
  - Governor Polis up for re-election and many state legislative seats
  - Sen. Michael Bennet and every congressional seat up as well
  - New Congressional District – one of the most competitive in the country (CD8)
Lauren Huffer
Partnership Services Manager
2022 Partnership Update

- **Stay Involved!**

- **Review and Update Your Partner Listings**
  - Update Venue Information
  - Utilize Threshold 360 (360-degree capture for hotels and venues)
  - Add special offers
  - Add public events to the Denver365 Events Calendar
  - Submit a hotel deal
  - Minority-owned & Woman-owned (through extranet amenities tab)

- **Attend Monthly Partner Events**

- **Advertise on VISIT DENVER platforms**
VISIT DENVER Foundation

- Awards scholarships to college students in Colorado who are pursuing a degree in Tourism & Hospitality

- University Hospitality Programs
  - Colorado Mesa University
  - Colorado State University
  - Metropolitan State University of Denver
  - University of Denver
  - University of Northern Colorado

- 35th Annual VISIT DENVER Foundation Cup & Partnership Open
  - Held Tuesday, June 7 at City Park Golf Course
  - Raised more than $26,000 for the VISIT DENVER Foundation

- Raised $120,000 total funds in 2022

- Awarded $116,000 in scholarships to 36 students in April 2022

- Awarded $1.3M to 481 students since 2000
113th Annual VISIT DENVER Partnership Meeting

- Save the Date!
- **Tuesday, November 15** at the Seawell Ballroom
- Breakfast Meeting
- Free!