



**Travel Nevada**

# **Integrated Marketing Effectiveness Study**

Fiscal Year 2021 Year End Report

Omnitrak Group



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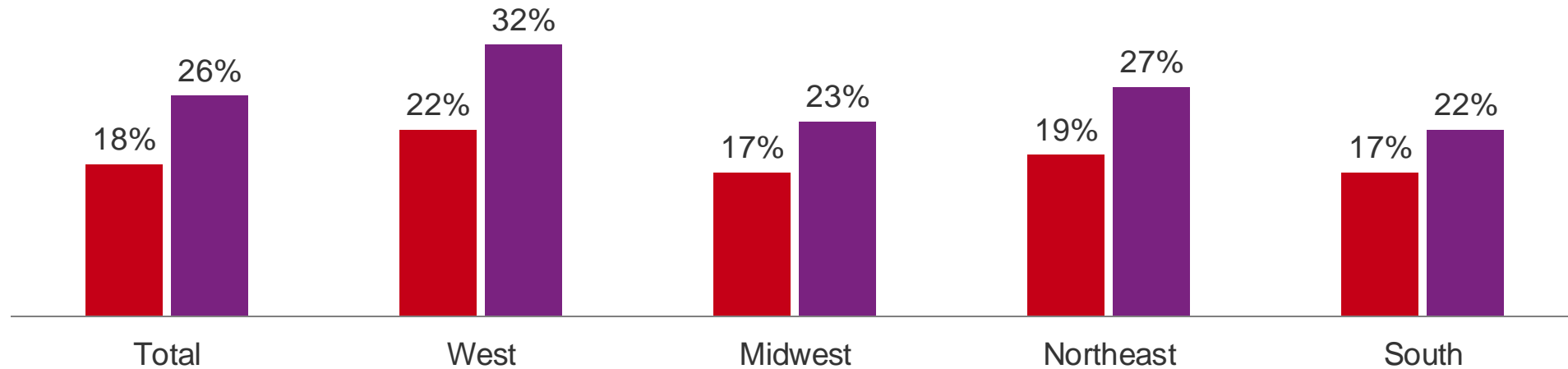
# Travel Marketplace

# Travel Resilience Fuels Recovery

- Leisure travel rebounded in 2021, sort of.
- Recovery has been uneven.
- Air travel demand is returning, Avid Travelers lead the way.

## Percent Extremely Likely to Vacation by Air Next 12 Months

■ Nov 2020 ■ Nov 2021



# IME Topline Results

## Study Objectives



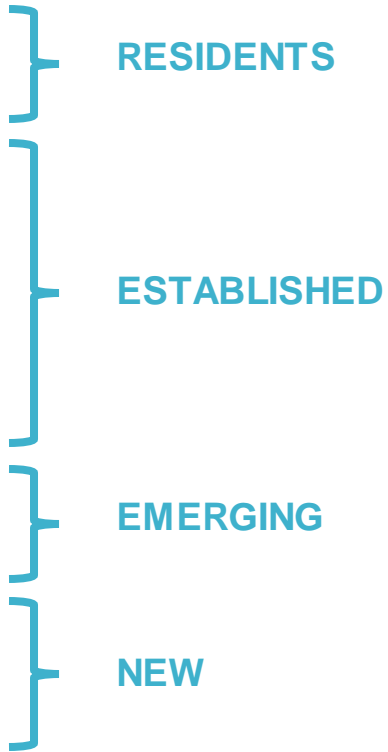
- 1. Measure the impact of the 2020/21 Integrated Marketing Campaign and its effect on awareness of Nevada as a destination, including brand perceptions and intent to visit among key source markets**
- 2. How Nevada ranks among its competitive set**
- 3. Target audience behaviors, attitudes, and motivators towards travel**
- 4. Overall return on investment of Travel Nevada's marketing programs**

# Defining the Target Audience

- Adults age 21+
- Took overnight leisure trip in the past 24 months

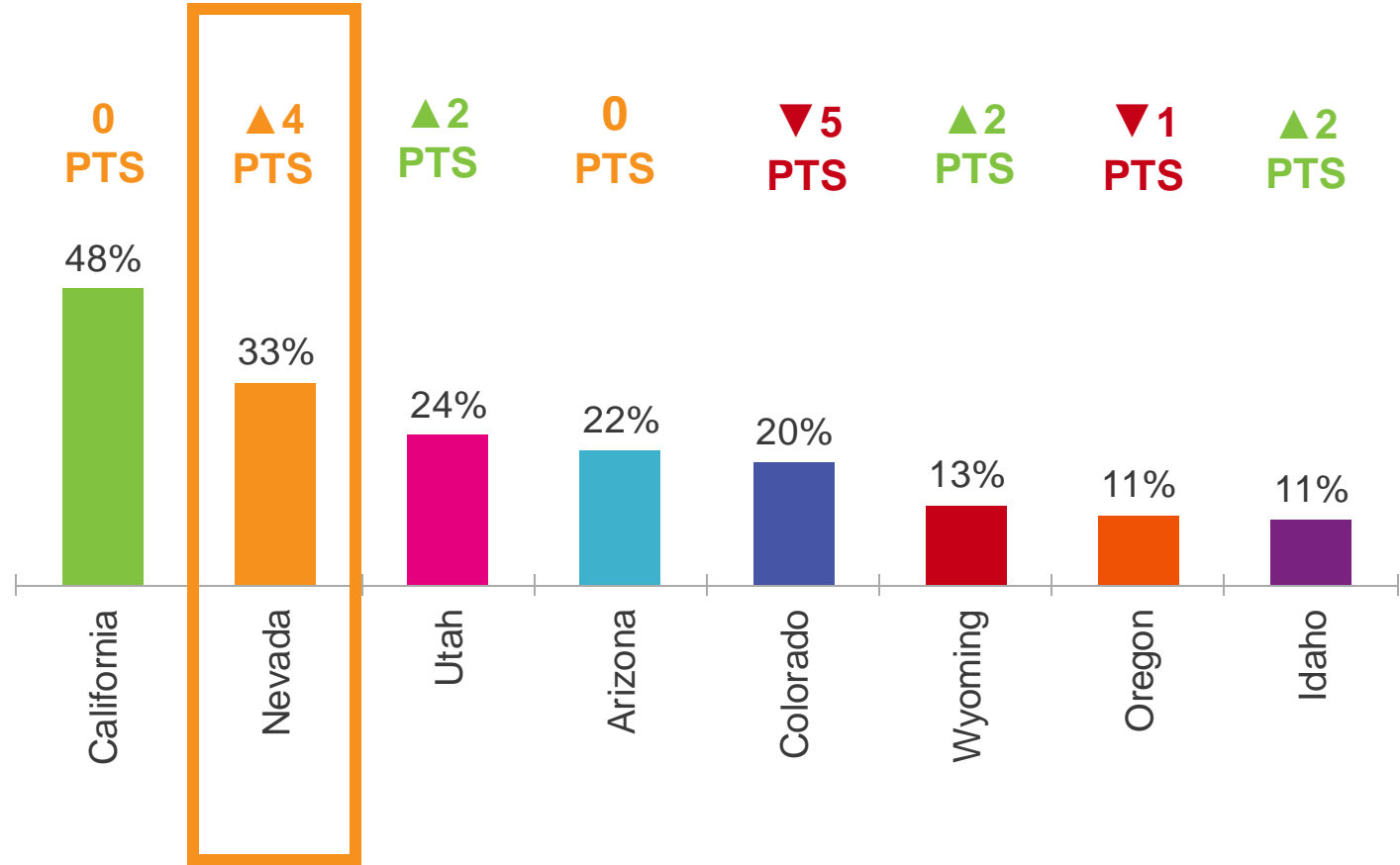
- Lives in:

- Reno
- Las Vegas
- Other Nevada
- Los Angeles
- Phoenix
- Salt Lake City
- San Francisco
- San Diego
- Boise
- Sacramento
- Portland
- Dallas
- Houston
- Atlanta
- Minneapolis
- Chicago
- Boston



# Nevada Near Top of Mind for Target Travelers

## Unaided Advertising Recall for Competitor Destinations

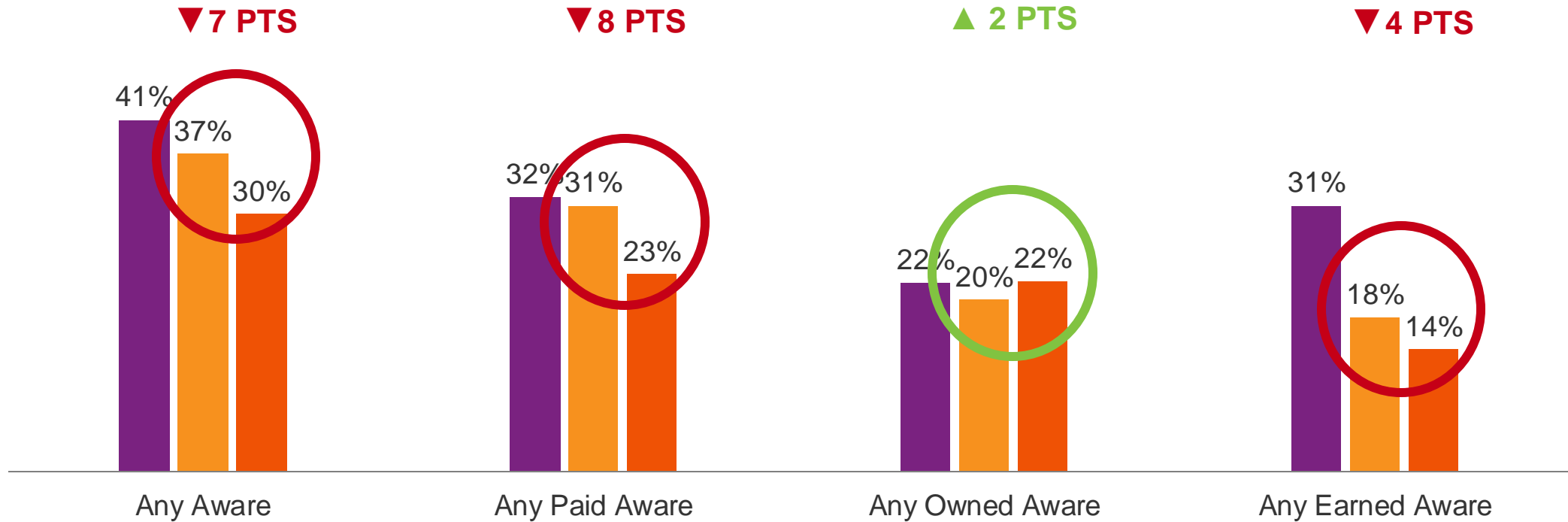




# Overall IMC Awareness Down Year-Over-Year

## Integrated Marketing Campaign Awareness

FY 2019 FY 2020\* FY 2021

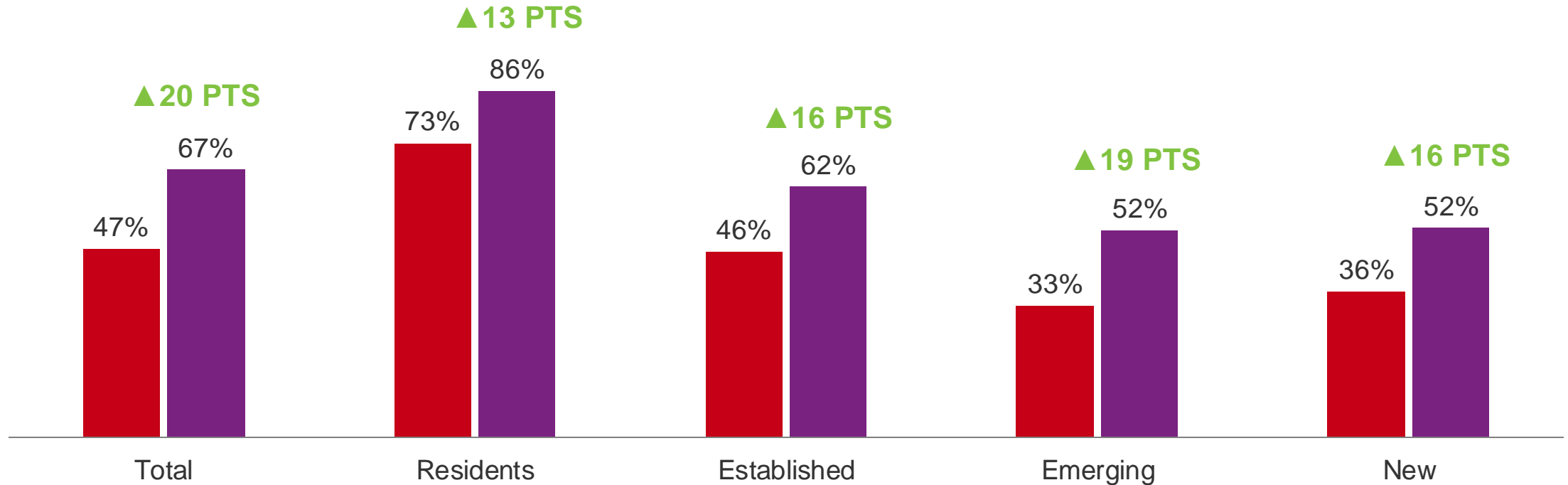


\*through Q3

# IMC Exposure Increases Nevada Travel Consideration

## Interested in Visiting Nevada Next 24 Months

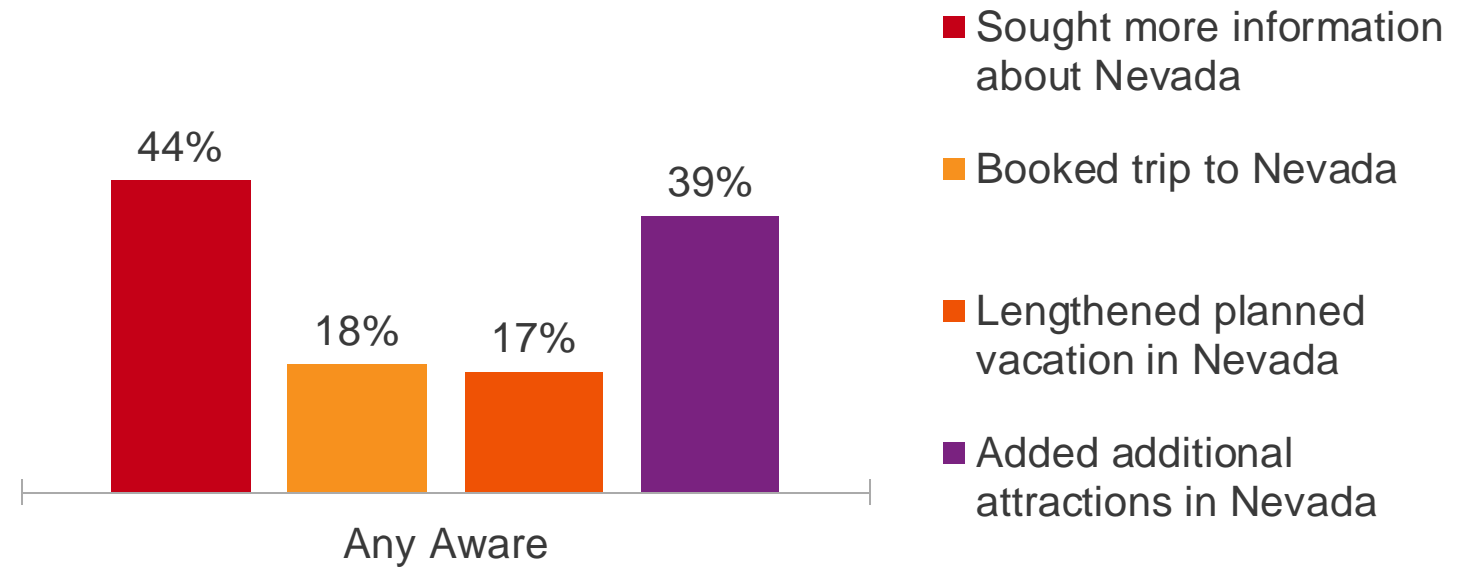
■ Unaware ■ Aware



# One in five booked a trip to Nevada after seeing the IMC



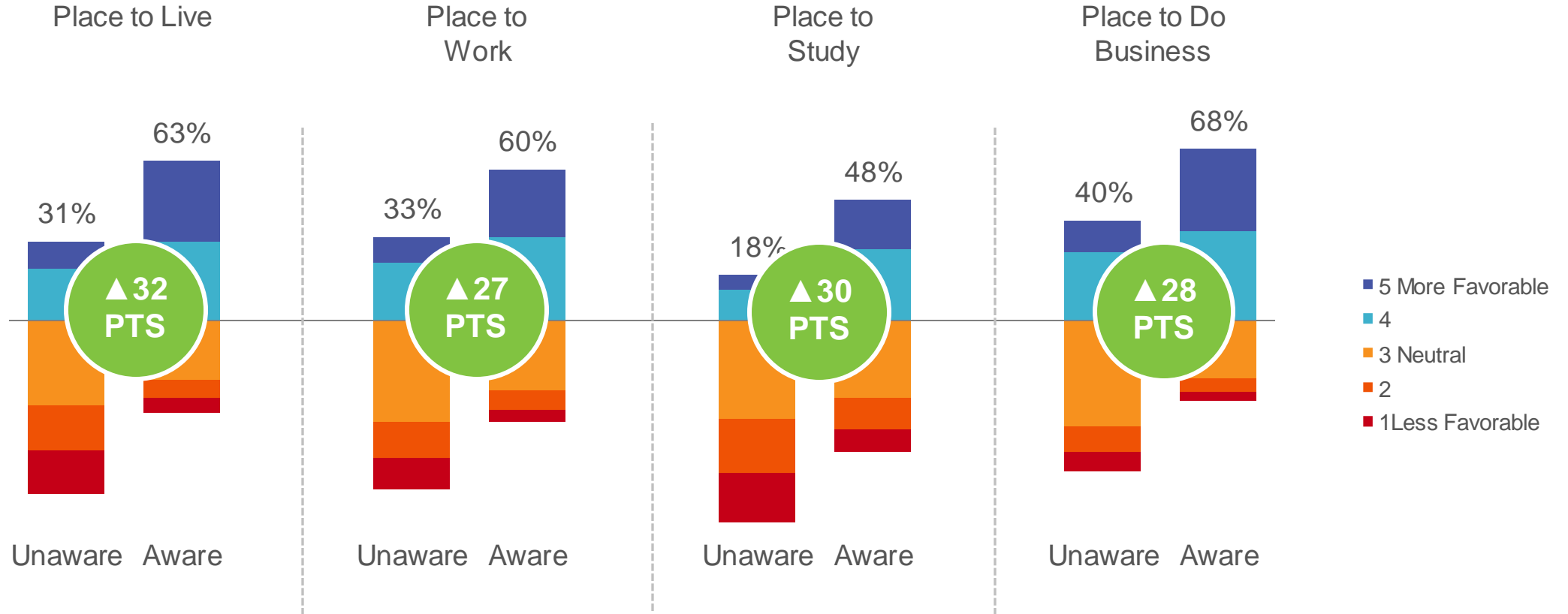
## Action Taken After Seeing FY21 IMC



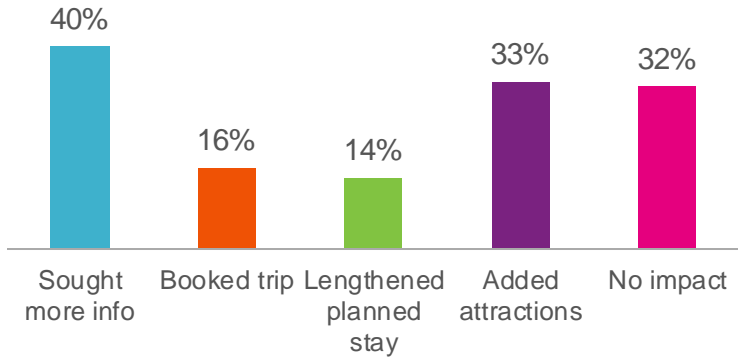
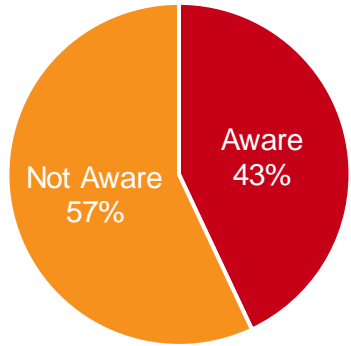
**= % Impacted by IMC**

# IMC Also Has Positive Impact on Economic Development

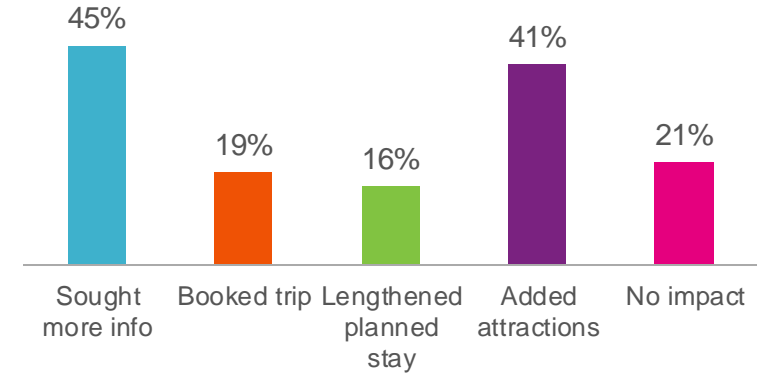
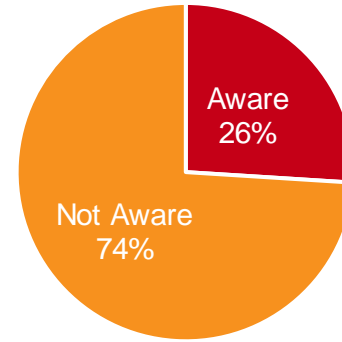
## Nevada Rating



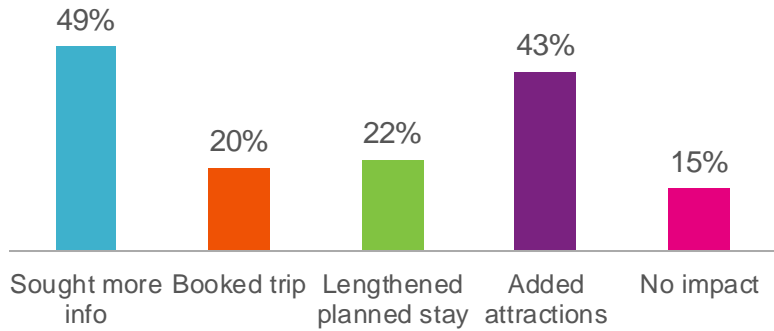
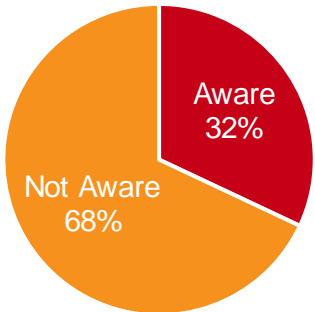
## Nevada Residents



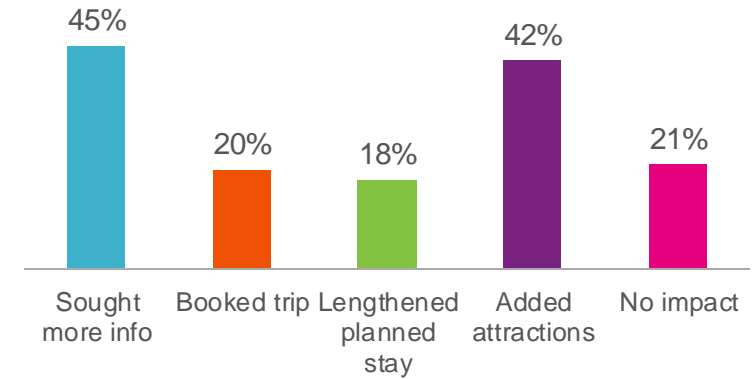
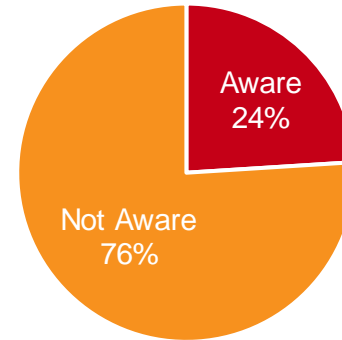
## Established Markets



## Emerging Markets



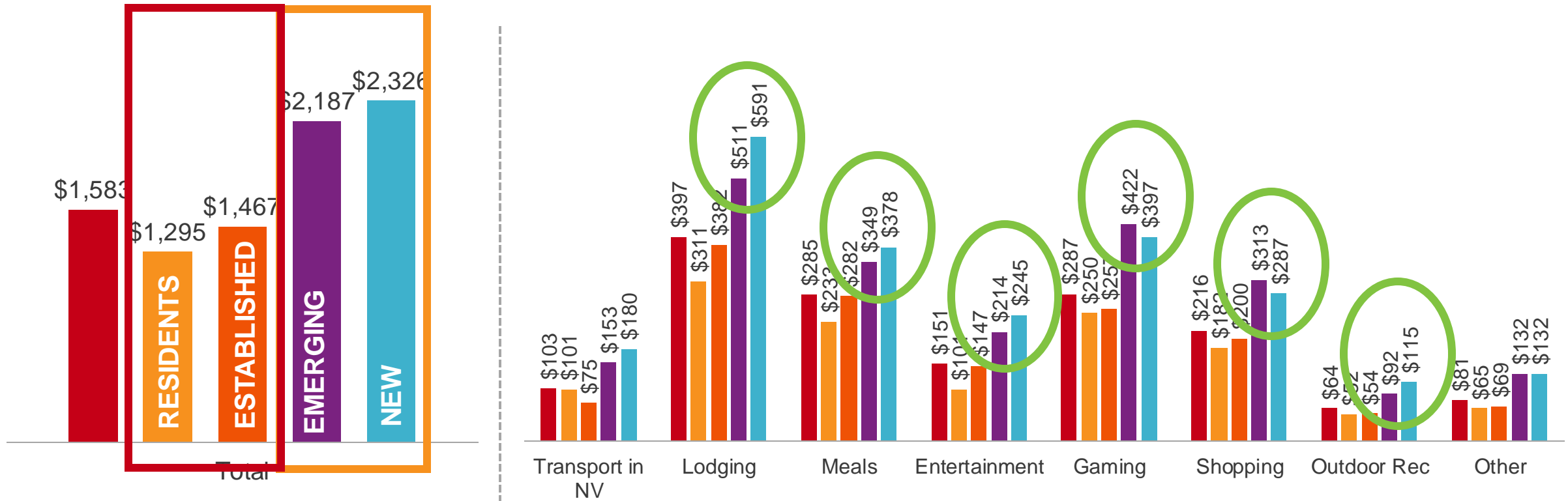
## New Markets



# In-Destination Spending is Highest among New and Emerging Markets

## Nevada Spending by Category Last Trip

■ Total ■ Resident ■ Established ■ Emerging ■ New



# Which Markets Yield the Highest ROI?

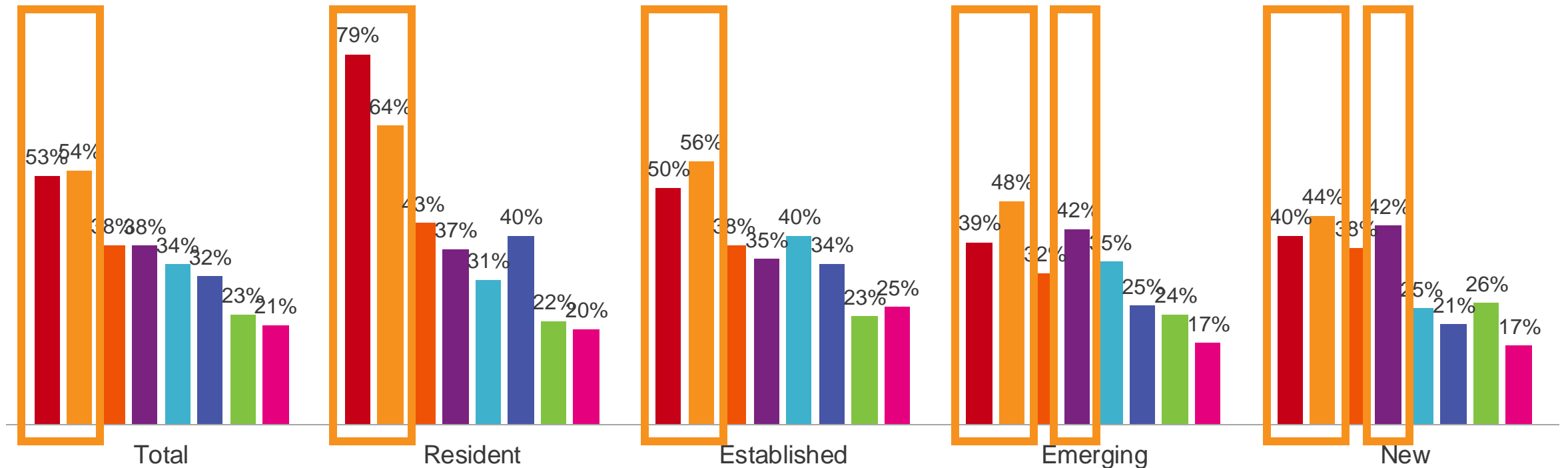
**Estimated Return on Investment Based on Households Meeting These Criteria:  
Age 21+, Took 1+ Leisure Trip of 1+ Nights in Past 2 Years**

<b>IMC Aware &amp; Any Positive Impact &amp; Plan to Visit NV Next 12 Months</b>	<b>Residents</b>	<b>Established</b>	<b>Emerging</b>	<b>New</b>
Qualified Households (HHs) in Market	1,200,000	14,549,830	6,847,890	10,497,540
% IMC Aware	43%	26%	32%	24%
% IMC Aware & Any Impact & Planning Visit N12M	25%	10%	11%	9%
# Households Influenced	134,562	640,701	326,804	439,853
Average HH Spend in NV per Trip	\$1,295	\$1,467	\$2,187	\$2,326
Average # Trips per Year	2.6	2.0	2.0	1.7
Total HH Spend in NV per Year	\$3,396	\$2,925	\$4,332	\$3,968
Total Estimated Spending in NV	\$456,969,442	\$1,873,830,745	\$1,415,687,652	\$1,745,340,710
Total Estimated Tax Revenue for NV	\$43,190,599	\$179,218,589	\$133,363,760	\$166,453,330

# Nevada at Top of Destination Consideration Set

## Destinations Interested in Visiting Next 24 Months

■ Nevada 
 ■ California 
 ■ Arizona 
 ■ Colorado 
 ■ Oregon 
 ■ Utah 
 ■ Wyoming 
 ■ Idaho



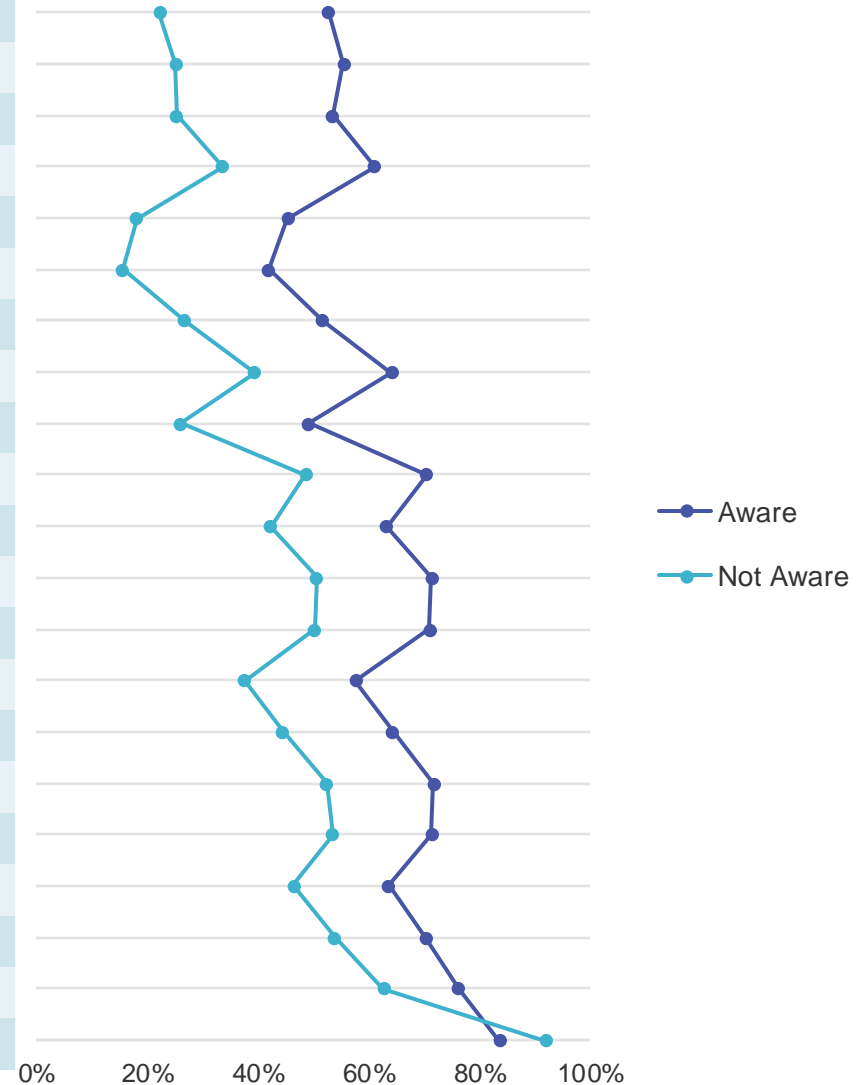


# Destination Attributes – Importance vs Nevada Rating

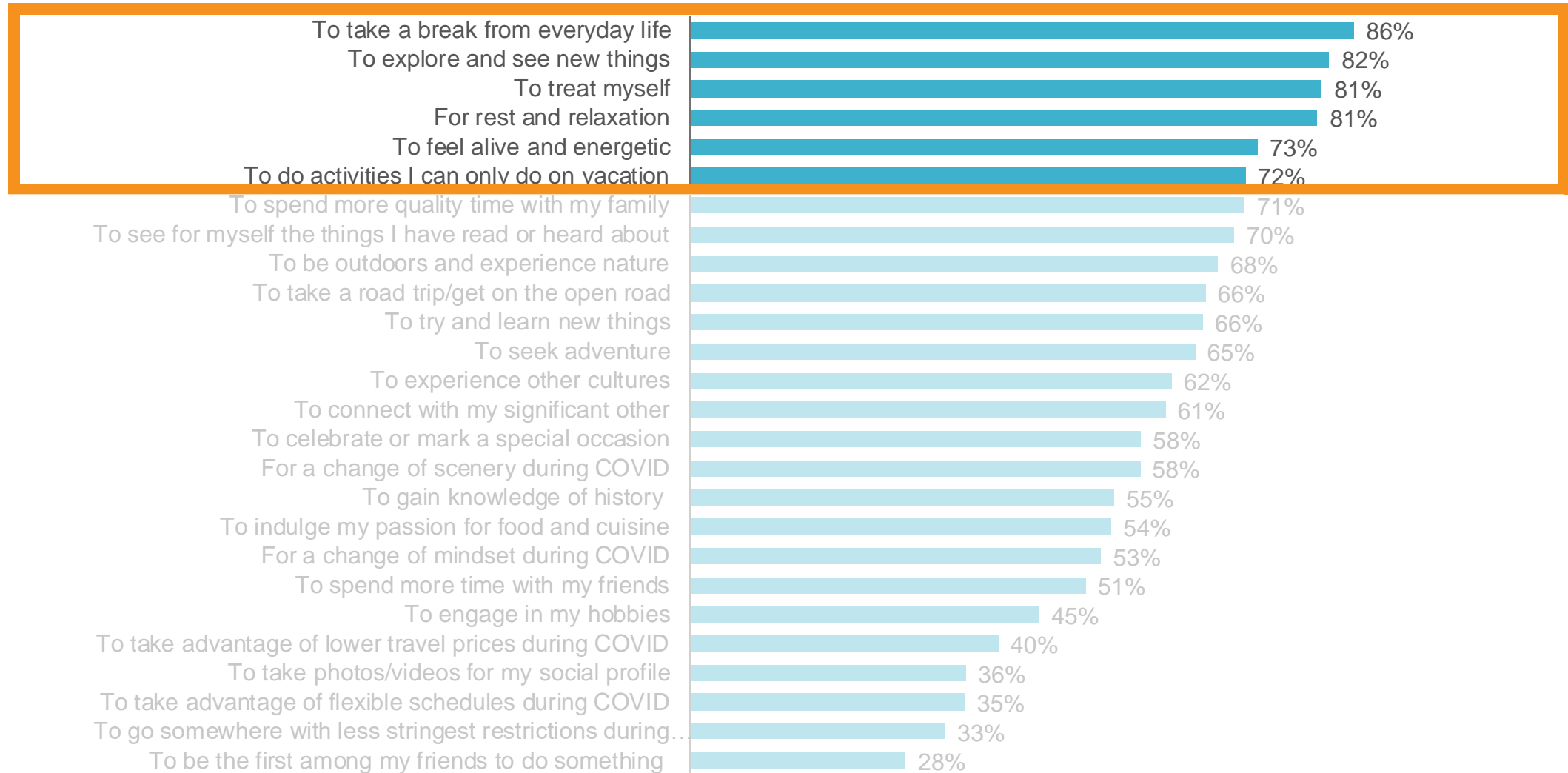


# Impact of IMC on Destination Attributes

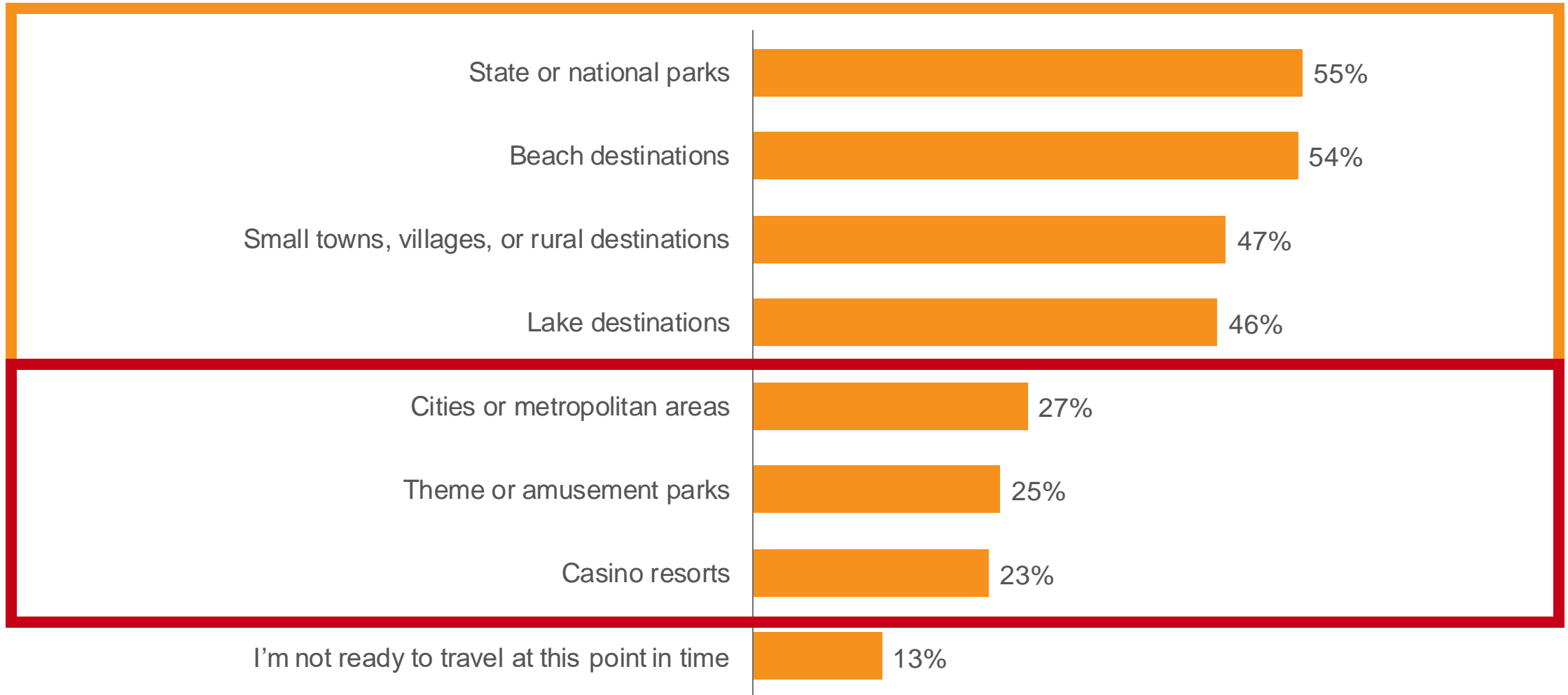
Attribute	Difference
Safe from a public health perspective	+31%
Family-friendly/activities for children	+30%
Residents and visitors that follow health and safety guidelines	+28%
Restful/relaxing	+28%
Low or declining COVID-19 case levels	+27%
Minimal crowds/not busy	+26%
Museums/art galleries	+25%
Good value for money	+25%
Winter sports/activities (i.e. skiing, snowboarding, etc.)	+23%
Outdoor adventure activities	+22%
Local history and culture	+21%
Friendly/welcoming	+21%
Variety of special events and festivals	+21%
Off the beaten path towns	+20%
Close to home/driving distance	+20%
Beautiful/scenic	+19%
Great shopping	+18%
Western history and culture	+17%
Easy to explore/sightsee by car	+16%
Variety of things to see and do	+14%
Gambling and casinos	-8%



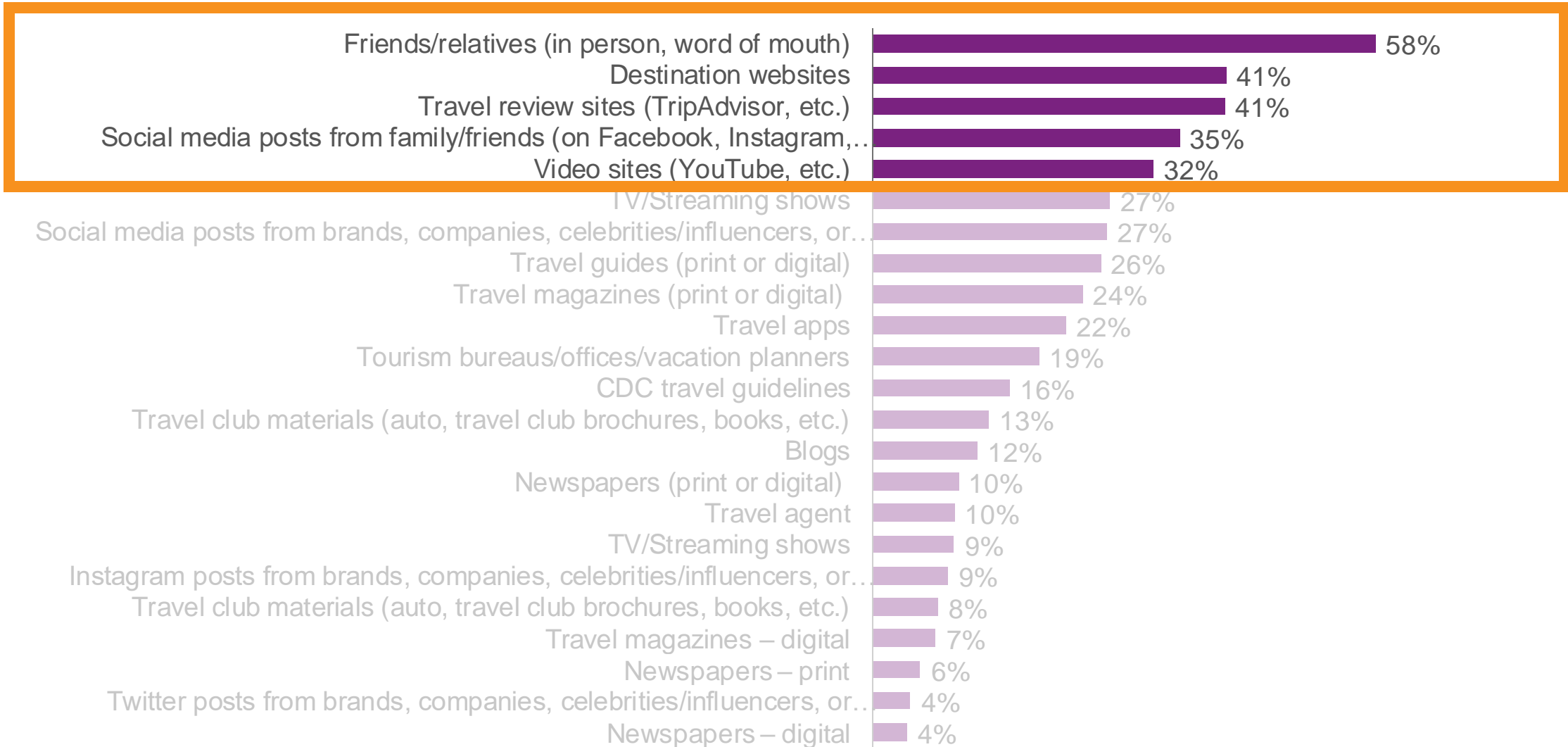
# Travel Motivators



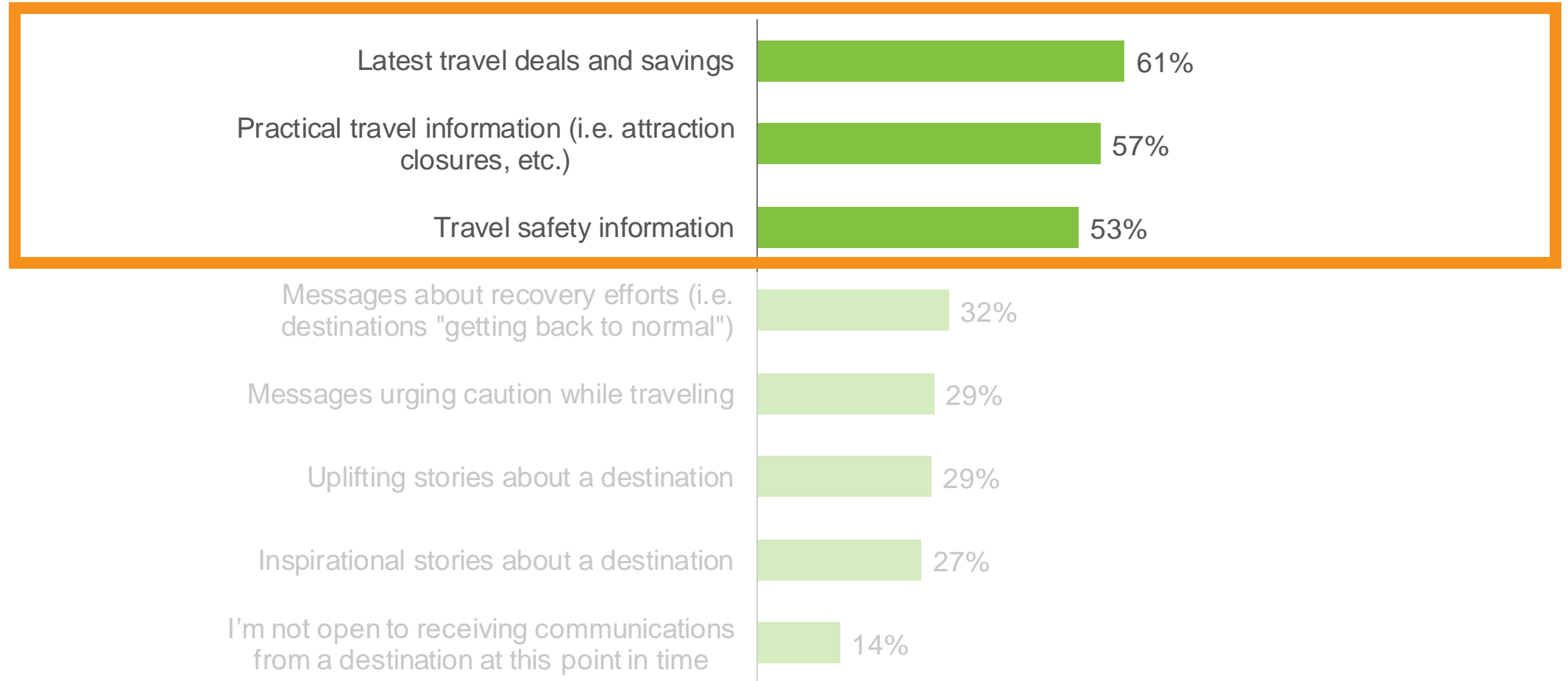
## Areas Open to Visiting



# Travel Inspiration Sources



## Information Open to Receiving



# Key Takeaways

## Key Takeaways



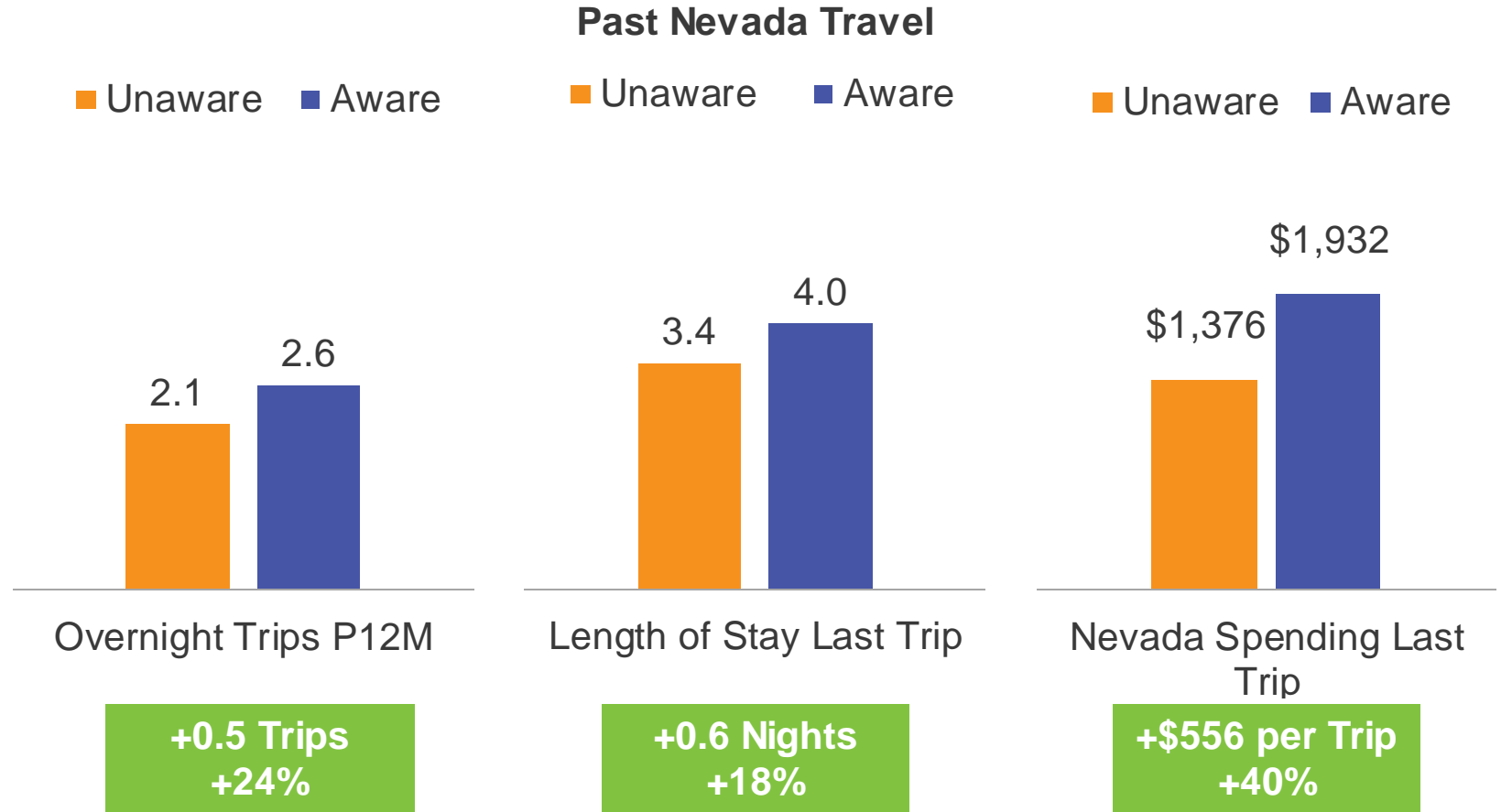
- 1. Travel Nevada's Integrated Marketing efforts positively impact Nevada travel consideration, activity planning and booking, and destination/Quality of Place perceptions.**
- 2. Travelers from Travel Nevada's New and Emerging markets stay longer and spend more (nearly 2x more) than Nevada Residents and visitors from Established markets.**
- 3. With air travel demand returning, now is the time to grow Nevada's presence in longer haul New and Emerging markets, while maintaining demand from Residents and Established markets.**



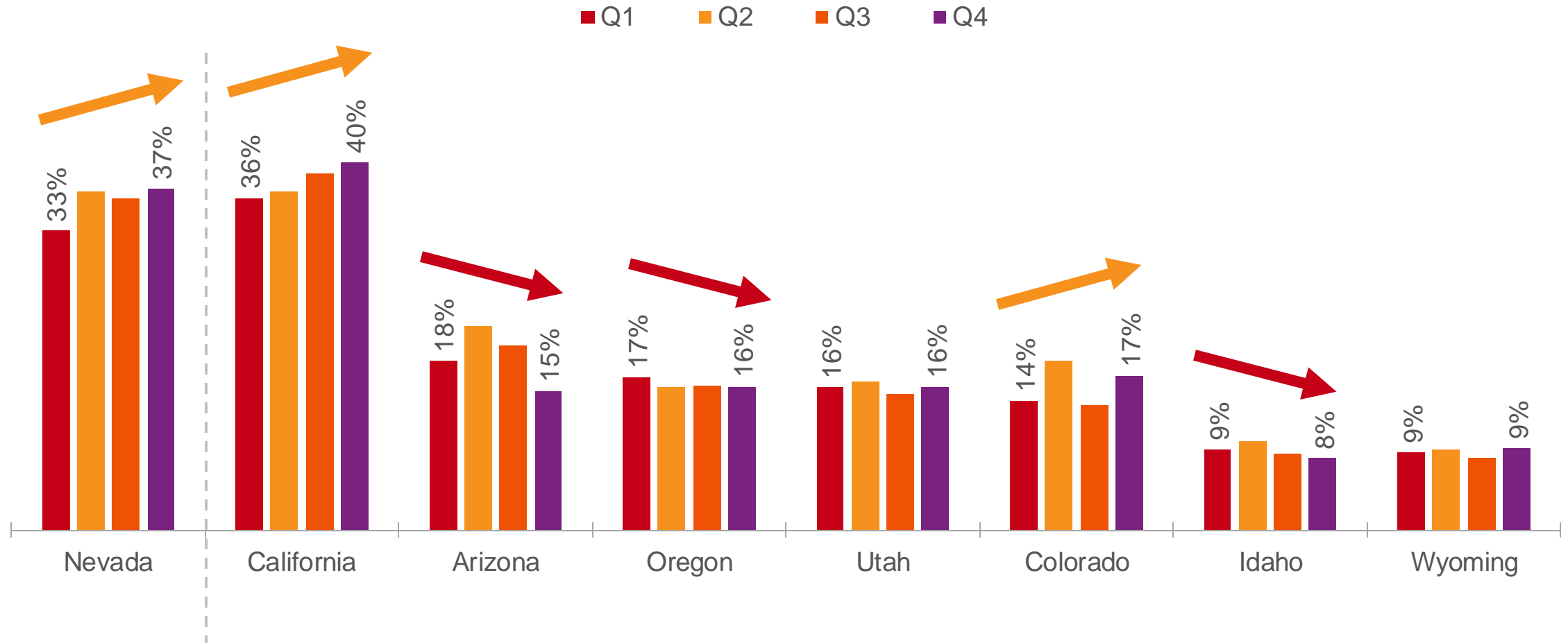
**Thank You!**

# Appendix

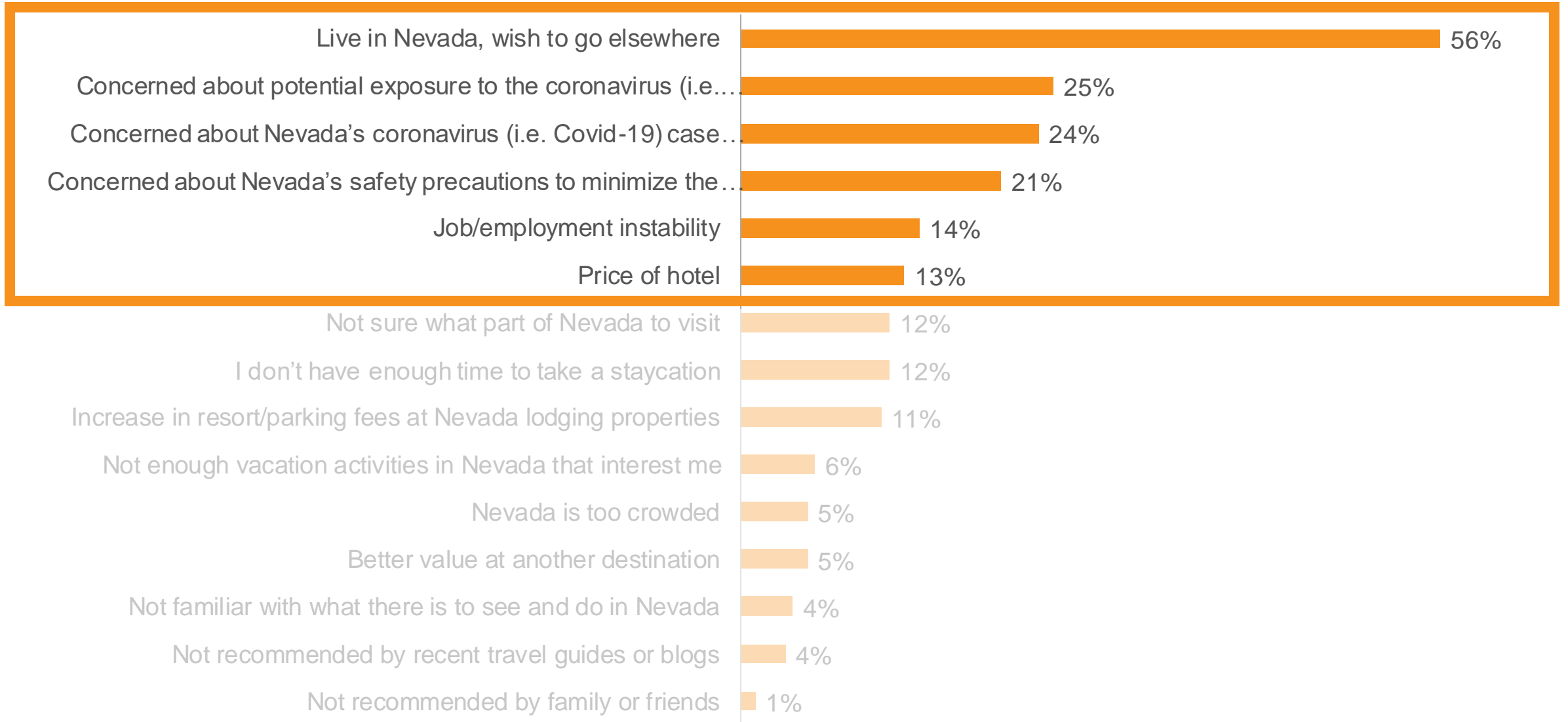
# IMC Aware Audience Take More Trips, Stays Longer, Spends More in Nevada



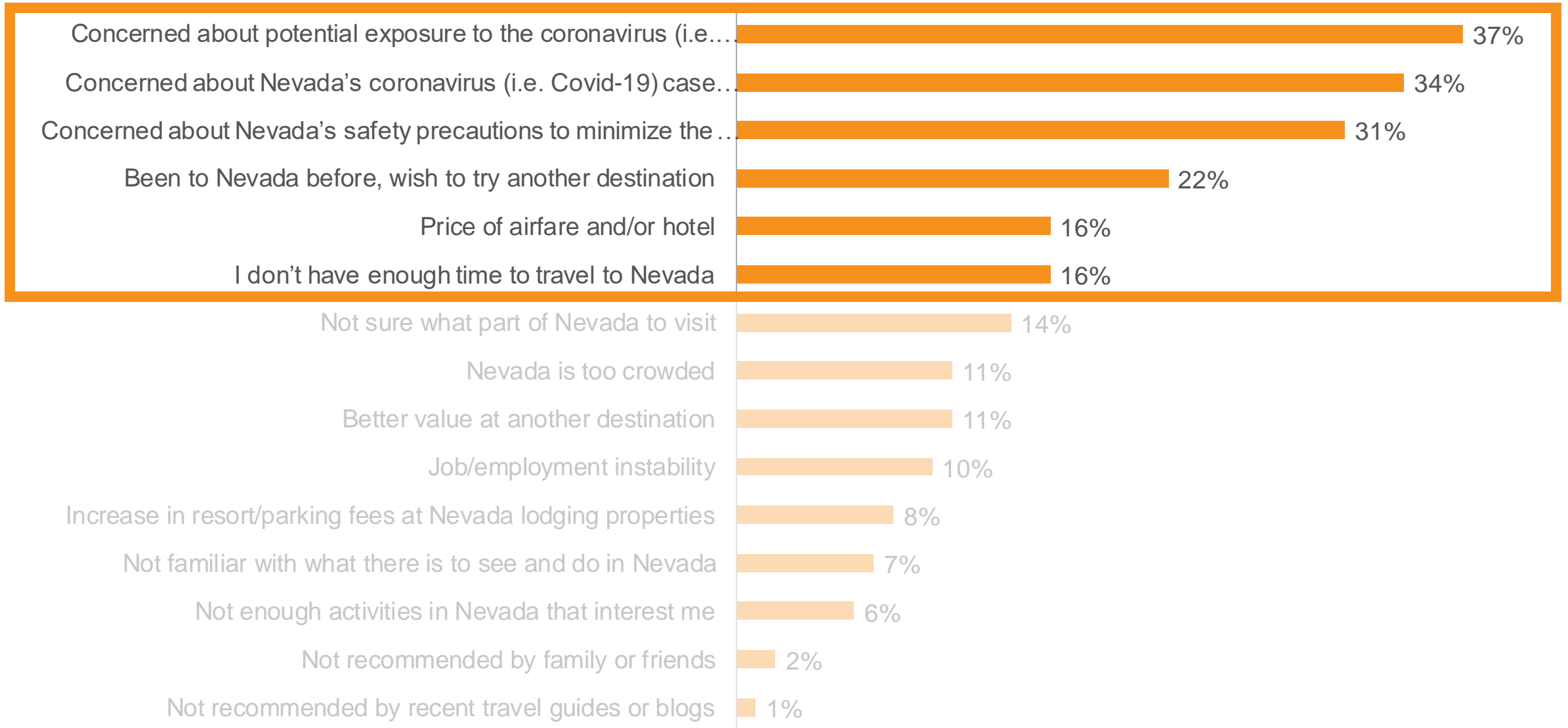
# Next 12 Month Travel Intentions by Quarter



## Nevada Travel Barriers Not Interested Next 12 Months – Residents



## Nevada Travel Barriers Not Planning Next 12 Months – Out of State



# Brand Messaging Opportunities

Brand Attribute	Need Gap Analysis (Attribute Importance - Nevada Rating)	Messaging Rank
Low or declining COVID-19 case levels	-48	Opportunity
Safe from a public health perspective	-46	Opportunity
Restful/relaxing	-42	Opportunity
Minimal crowds/not busy	-42	Opportunity
Residents & visitors that follow health & safety guidelines	-41	Opportunity
Good value for money	-40	Opportunity
Local history and culture	-12	Opportunity
Beautiful/scenic	-31	Strength
Friendly/welcoming	-31	Strength
Variety of things to see and do	-20	Strength
Easy to explore/sightsee by car	-13	Strength
Outdoor adventure activities	-5	Strength
Variety of special events and festivals	10	Maintain
Close to home/driving distance	15	Maintain
Great shopping	17	Maintain
Western history and culture	18	Maintain
Gambling and casinos	66	Maintain
Family-friendly/activities for children	-7	Low Priority
Museums/art galleries	-6	Low Priority
Off the beaten path towns	0	Low Priority
Winter sports/activities	12	Low Priority

## Key Takeaways



1. **Travel Nevada continued to build awareness and influence visitation in the face of a global pandemic. Although Integrated Marketing Campaign awareness declined year-over-year, there were notable gains in next 12-month travel intentions among the exposed audience.**
2. **The impact of the coronavirus pandemic on Nevada travel trended downward over the course of the year. Concerns about Nevada's case numbers and potential exposure while traveling decreased with each subsequent quarter as key travel barriers. Similarly, those who said COVID had no impact on their future Nevada travel plans grew.**
3. **That said, the pandemic had a significant impact on perceptions of Nevada as a leisure travel destination. Good value, restful/relaxing, and friendly/welcoming, all of which rank high in importance, fell in terms of Nevada's rating year-over-year. Despite this, the FY 2021 IMC still succeeded in boosting perceptions on these attributes, as well as many others. There were notable gains for being safe from a public health perspective, following health and safety protocols, and being family-friendly.**