

State of the State

Monthly Report Data Rolling 12 Months

METRIC	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL (p)	AUG (p)	SEP (p)
Room Tax Collections	\$0.94 M	\$0.74 M	\$0.61 M	\$0.61 M	\$0.72 M	\$1.12M	\$1.37 M	\$1.69 M	\$1.84 M	\$2.33 M	\$2.09 M	\$1.97 M
Visitor Volume	2.75M	2.15M	2.01M	2.15M	2.30M	3.10M	3.49M	3.78M	4.07M	4.32M	4.01M	3.90M
Room Nights Occupied	2.72M	2.20M	1.85M	1.93M	2.24M	3.16M	3.61M	3.96M	4.16M	4.53M	4.19M	4.04M

NV COVID Hospitalizations

(Daily Average)
Source: Nevada DHHS

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
	514	1,127	1,872	1,636	778	329	338	296	275	834	1,238	1,036

Vaccinations

Source: CDC
(as of the last Friday of the month)

METRIC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Total Vaccines in NV Administered per 100k	7,827	22,262	43,781	66,591	81,497	90,128	96,264	104,099	110,306
% of Population with at least 1 Does	N/A	14.5%	27.7%	39.6%	45.6%	49.7%	53.6%	58.0%	60.8%

State of the Industry

Source: Destination Analysis

2021 Data

Travel Sentiment

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT
Personal concern about contracting virus (0 = Not at all concerned; 10 = Extremely concerned)	7.1	6.5	6.4	5.8	4.9	5.3	5.8	6.5	6.2	6.0

Excitement to take a weekend getaway in next month (0 = Not at all excited; 10 = Extremely excited)

	5.7	5.8	6.2	6.4	7.1	7.1	6.8	6.7	6.8	7.0
--	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

Travel Confidence

In the next month, how if at all do you expect the severity of the coronavirus situation in the United States to change (% get better or get much better)

	35.0	44.2	53.3	44.3	63.4	51.9	32.0	26.3	30.2	39.1
--	------	------	------	------	------	------	------	------	------	------

How confident are you that you can travel safely in the current environment (% confident or very confident)

	31.8	31.5	35.7	40.4	48.5	47.8	49.3	42.8	42.8	47.5
--	------	------	------	------	------	------	------	------	------	------

Travel Activities

At this moment, how safe would you feel doing each type of travel activity (% somewhat unsafe or very unsafe)

Going to a casino	62.9	56.8	54.1	45.3	33.5	34.1	41.0	43.7	44.2	36.4
Non-team outdoor activity (biking, hiking, etc.)	20.4	18.7	15.6	16.2	11.5	9.5	9.5	13.0	12.7	9.5
Taking a road trip	21.0	17.8	14.6	13.7	9.2	8.0	8.8	12.3	12.1	8.2
Traveling on a commercial airline	54.7	47.8	42.5	38.3	28.3	30.7	30.2	34.3	37.6	32.1

State of the Travel Nevada

NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

Website Traffic

126,191	189,441	130,556	166,136	232,476	310,080	427,750	407,742	369,749	275,881	275,906	272,261
---------	---------	---------	---------	---------	---------	---------	---------	---------	---------	---------	---------

Newsletter Subscribers

53,900	57,977	58,315	58,879	58,979	60,596	46,150	48,420	49,993	51,059	52,100	57,484
--------	--------	--------	--------	--------	--------	--------	--------	--------	--------	--------	--------

Social Followers

278,142	281,246	281,928	282,671	283,730	285,649	288,902	290,866	292,531	293,263	293,548	295,330
---------	---------	---------	---------	---------	---------	---------	---------	---------	---------	---------	---------

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

Avg Session Duration Direct/Organic (in minutes)

2020

1.53	1.37	1.37	1.33	1.40	1.42	1.32	1.45	2.12	2.33	2.30	2.28
------	------	------	------	------	------	------	------	------	------	------	------

2021

2.20	2.20	2.10	2.13	2.05	2.02	1.95	1.82	1.83	2.00		
------	------	------	------	------	------	------	------	------	------	--	--

Avg Session Duration Overall (in minutes)

2020

1.12	1.12	1.18	1.38	1.45	1.47	1.38	1.50	2.08	2.22	1.88	1.80
------	------	------	------	------	------	------	------	------	------	------	------

2021

2.15	2.03	2.00	1.55	1.38	1.42	1.58	1.70	1.72	1.82		
------	------	------	------	------	------	------	------	------	------	--	--

Email Open Rate

2020

14.9%	13.6%	14.0%	16.7%	16.2%	16.6%	17.5%	14.4%	27.8%	24.6%	20.5%	23.8%
-------	-------	-------	-------	-------	-------	-------	-------	-------	-------	-------	-------

2021

26.5%	25.9%	25.8%	26.6%	31.8%	31.5%	31.8%	30.8%	34.9%	28.5%		
-------	-------	-------	-------	-------	-------	-------	-------	-------	-------	--	--

Social Engagement

2019

78,414	119,596	112,236	109,861	137,637	141,502	67,286	92,198	64,738	99,516	46,932	52,226
--------	---------	---------	---------	---------	---------	--------	--------	--------	--------	--------	--------

2020

94,877	76,043	45,241	47,975	27,106	19,632	27,812	30,446	36,448	33,045	101,011	174,791
--------	--------	--------	--------	--------	--------	--------	--------	--------	--------	---------	---------

2021

33,757	55,942	38,306	138,885	240,071	170,369	214,961	69,522	40,127	30,705		
--------	--------	--------	---------	---------	---------	---------	--------	--------	--------	--	--

State of Awareness

Source: OmniTrak Group

Interest in future travel FY21

Out-of-state Residents

METRIC	UNAWARE	AWARE
Interested in visiting Nevada in next 24 months	41%	57%
Planning on visiting Nevada in next 12 months	23%	42%

Nevada Residents

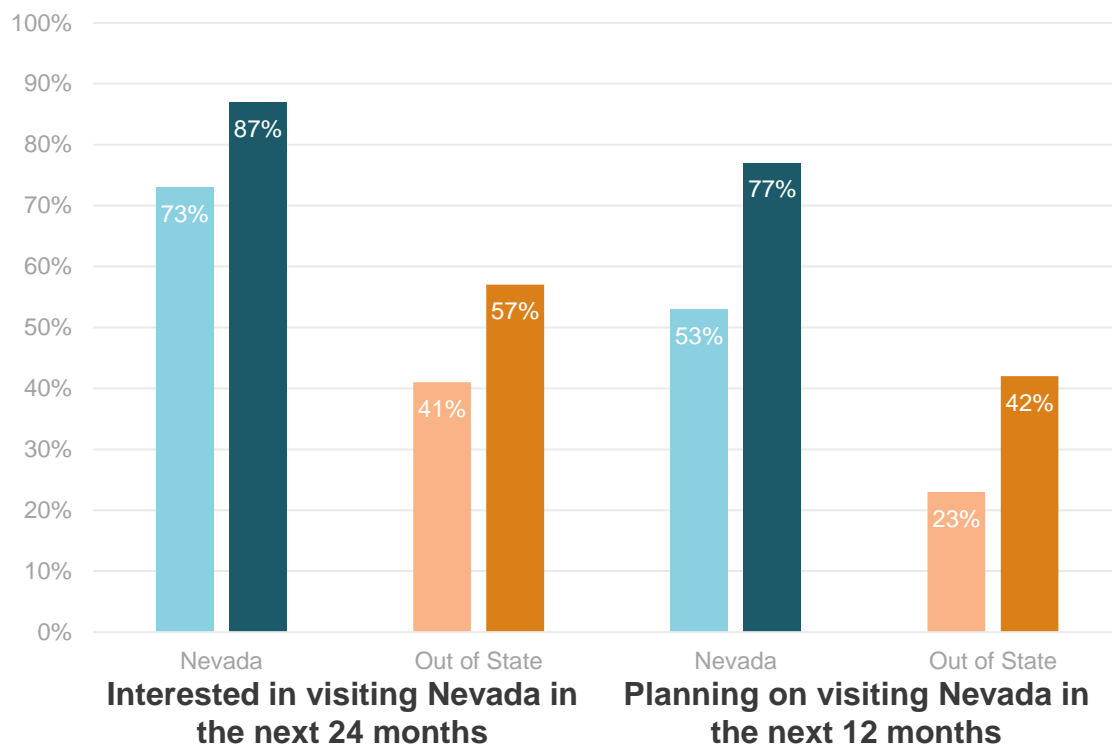
METRIC	UNAWARE	AWARE
Interested in visiting Nevada in next 24 months	73%	87%
Planning on visiting Nevada in next 12 months	53%	77%

Awareness measures the percent of respondents who recall Travel Nevada's efforts. Reporting includes whether those who were aware of the Travel Nevada brand were more likely to have interest or intent to visit the state.

Why this is important: Awareness is tied to perception, which we can affect based on our creative, content, and strategy. With spending/budget levels being variable, it is important to track impacts our efforts may have on travel planning and travel interest.

Interest in Future Travel FY21

Source: OmniTrak Group



Aware OOS	Aware NV Res
Unaware OOS	Unaware NV Res

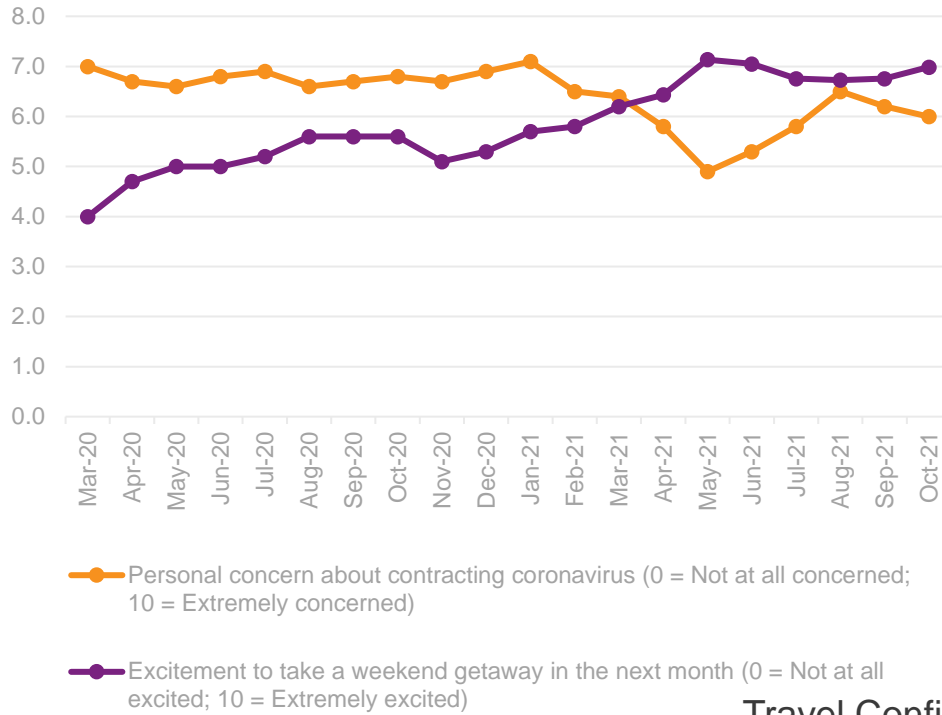
Takeaways

- In FY21, those who were aware of any efforts (including owned and earned), were more likely to consider Nevada as a travel destination.
- Nevadans who were aware of any efforts had a 14 point gain in interest to visit the state in the next 24 months and a 24 point gain in planning to visit the state compared with those who were unaware. The gains for the out of state audience were 16 and 19 points respectively.
- Future iterations of this report will include information on brand perception, incremental spending increases, and other impressions we can affect based on our efforts.

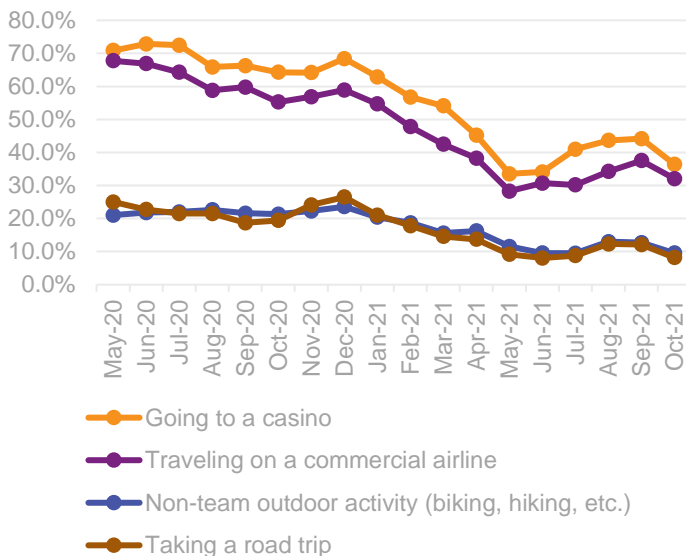
Nationwide, what is the current intent to consider or plan travel?

Why this is important: Knowing how consumers feel about travel preparedness, what types of trips they are willing to take, and when sentiment begins to shift, allow us to identify how we may be most effective in the marketplace.

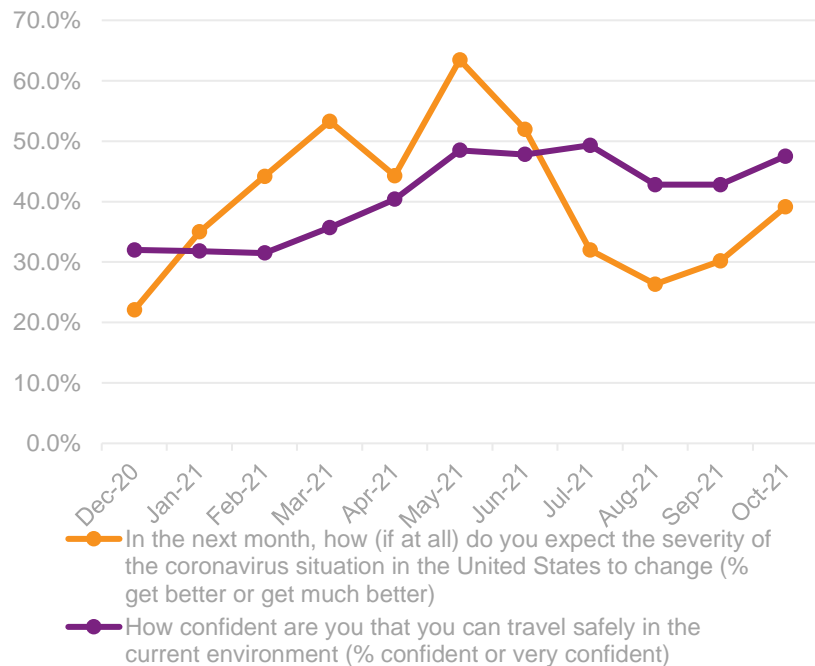
Travel Sentiment
 Source: Destination Analysts



Travel Activities
 At this moment, how safe do you feel doing each type of travel activity (% somewhat unsafe or very unsafe)
 Source: Destination Analysts

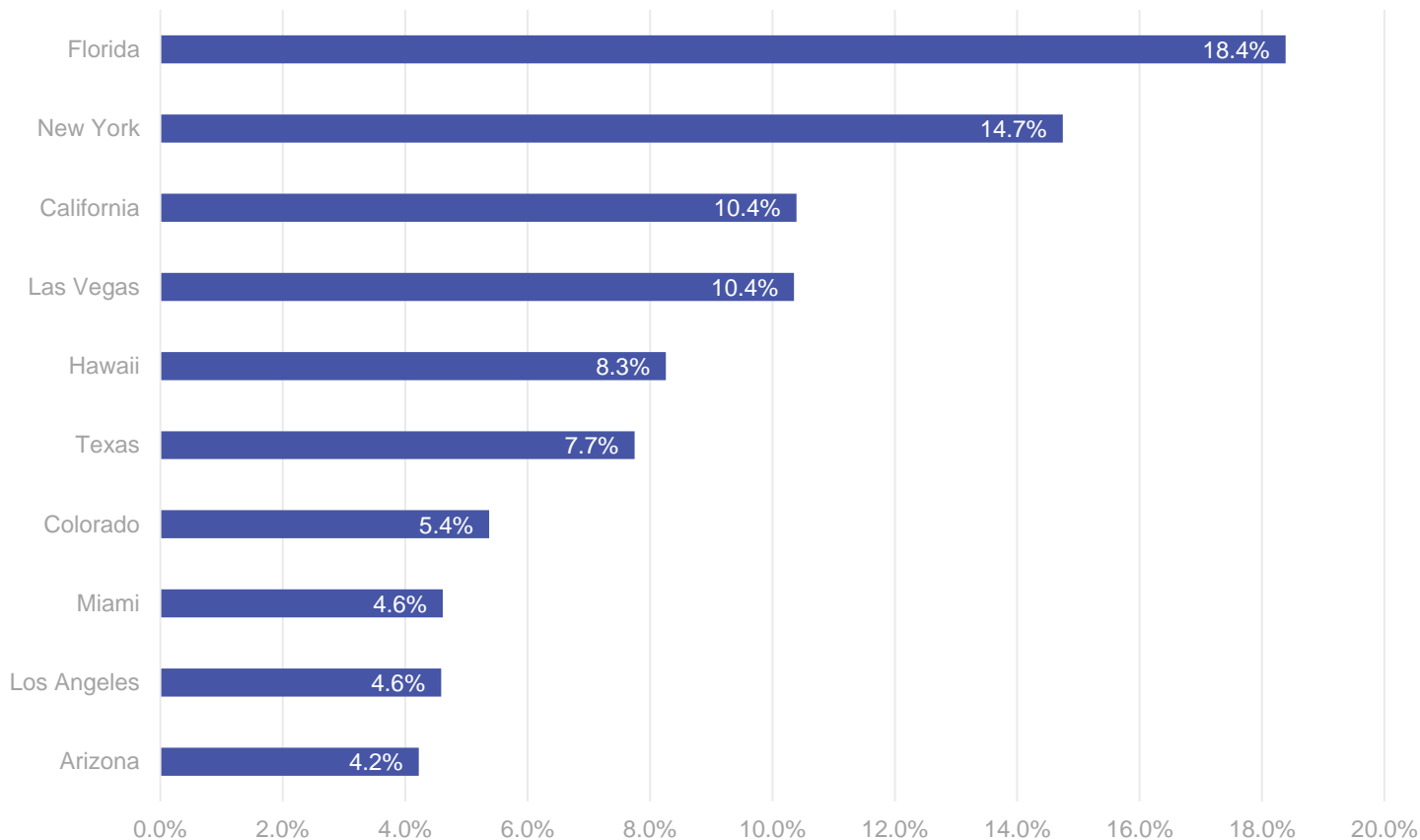


Travel Confidence
 Source: Destination Analysts



Desired Destinations

Which domestic destinations do you most want to visit in the next 12 months?
Source: Destination Analysts



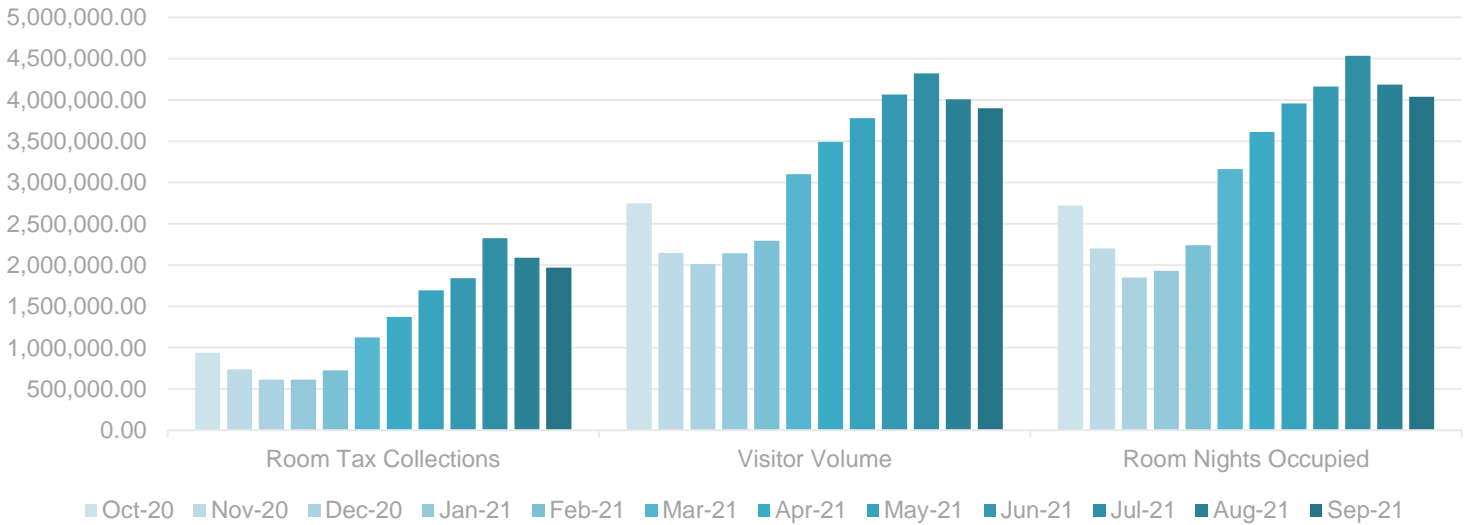
Takeaways

- Concern about contracting the coronavirus has tended to follow case counts in 2021. When COVID-19 case counts began to fall in the first quarter of 2021 amid the rollout of vaccinations, concern about contracting the virus began to fall as well. Similarly, when case counts began to rise due to the Delta variant in the summer of 2021, concern about contract the virus also rose.
- However, excitement to take a weekend getaway in the next month continued to remain elevated in the summer months even as concern for the virus also began to rise. This may be an indication that travelers, though still concerned about the coronavirus, may not be as willing to forego travel plans even when case counts begin to rise.
- Confidence in being able to travel safely has similarly remained elevated in the summer months, even as outlook for the coronavirus situation worsened.
- As consumers consider future travel, Las Vegas remains top of mind.

Statewide, how are visitor statistics and health metrics performing?

Why this is important: Visitation to the state is an ecosystem in which Travel Nevada seeks to positively impact tourism based on branding efforts, and room tax directly impacts our budget and the programs we can perform. The safety and health of residents and visitors is directly tied to the economic outlook of the tourism industry.

Monthly Report Data
 October 2020 - September 2021

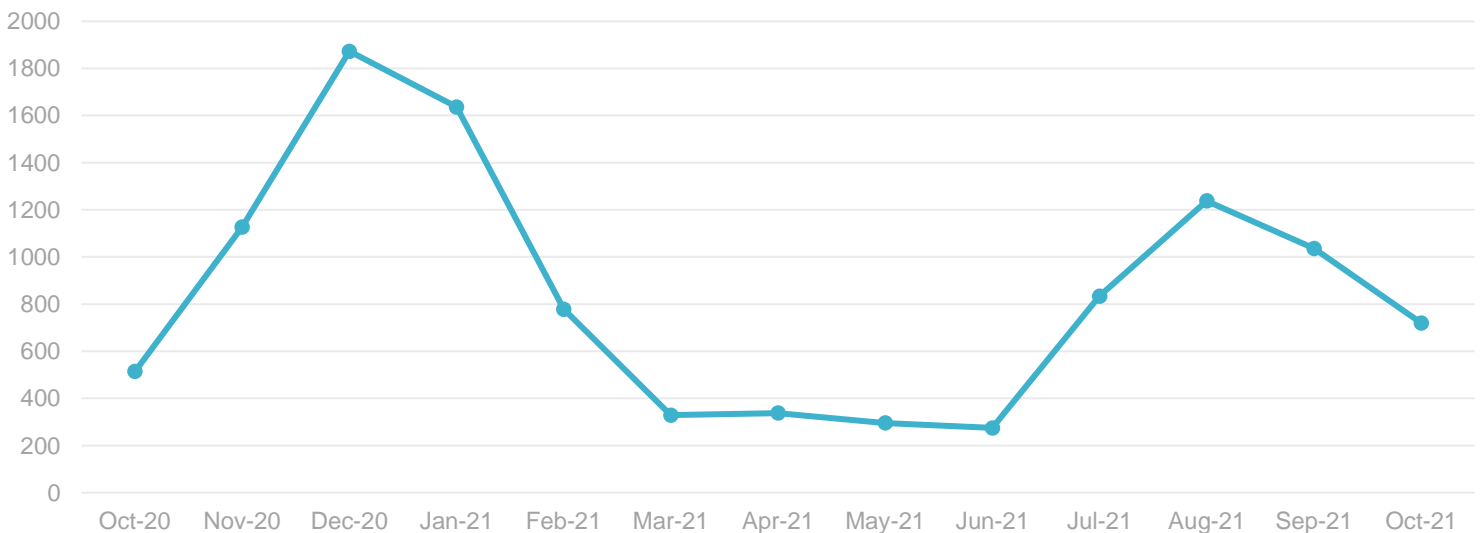


Room tax collections (directly impacts our budget)

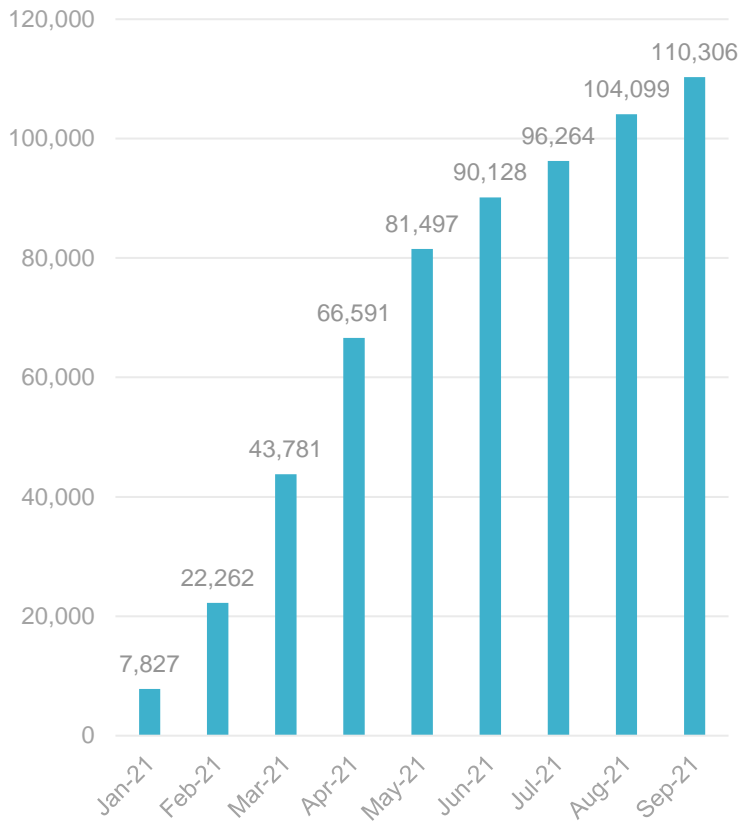
Visitor volume (economic impact)

Room nights occupied (percentage of total inventory)

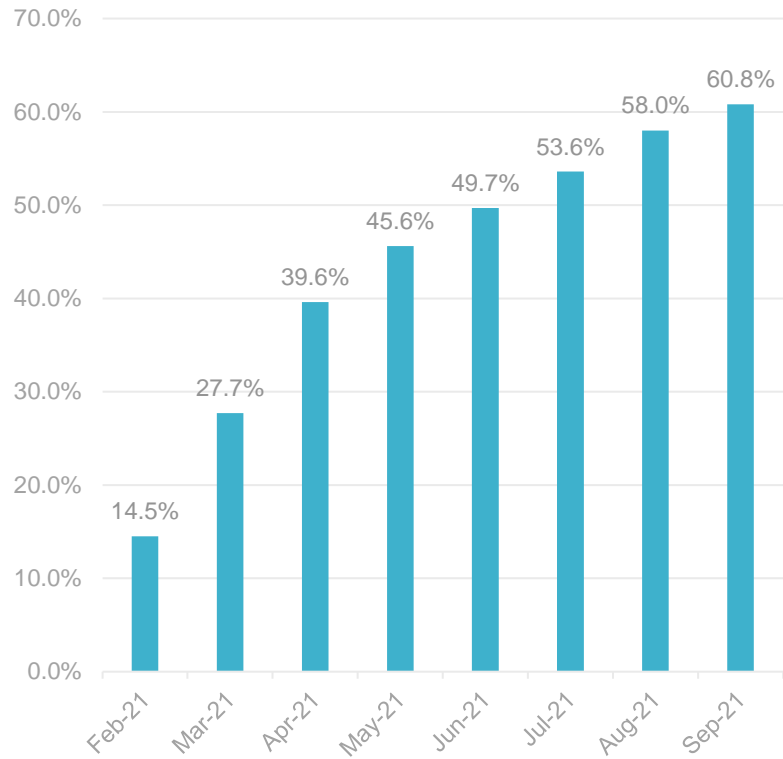
Nevada COVID Hospitalizations
 Daily average October 2020 - October 2021
 Source: Nevada DHHS



Vaccines per 100K
 Source: CDC*



Percent Of NV Population With At Least One Dose
 Source: CDC*



*As of the last day of month

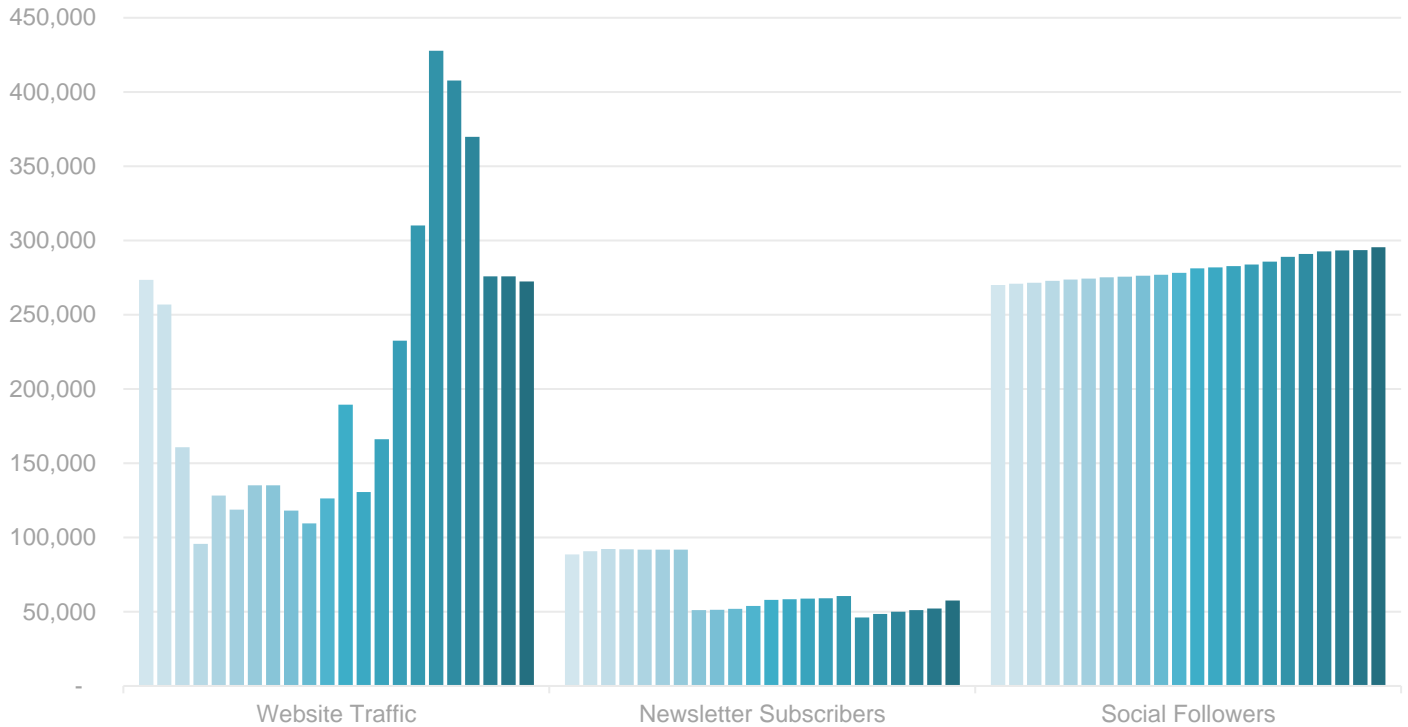
Takeaways

- Although COVID-19 case counts and hospitalizations rose during the summer months of 2021, room tax collections, visitor volume and room demand also rose. This may be an indication that COVID-19 health measures may not be as directly tied to travel as was seen during the height of the pandemic in 2020.
- The Delta variant did, however, lead to an increase in average daily hospitalization counts through the summer. This measure began to fall in September and continued to fall in October though.

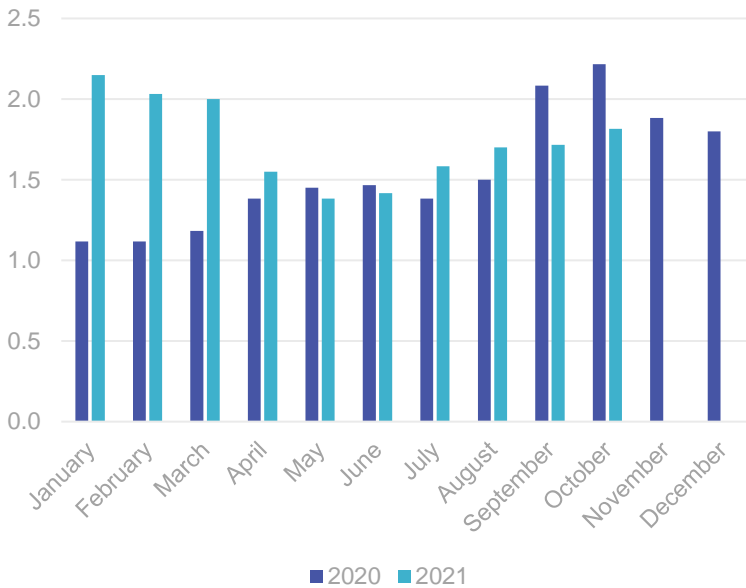
How are consumers engaging with Travel Nevada?

Why this is important: These metrics have been identified as consistent measures of ways we can be impactful, even with smaller budgets.

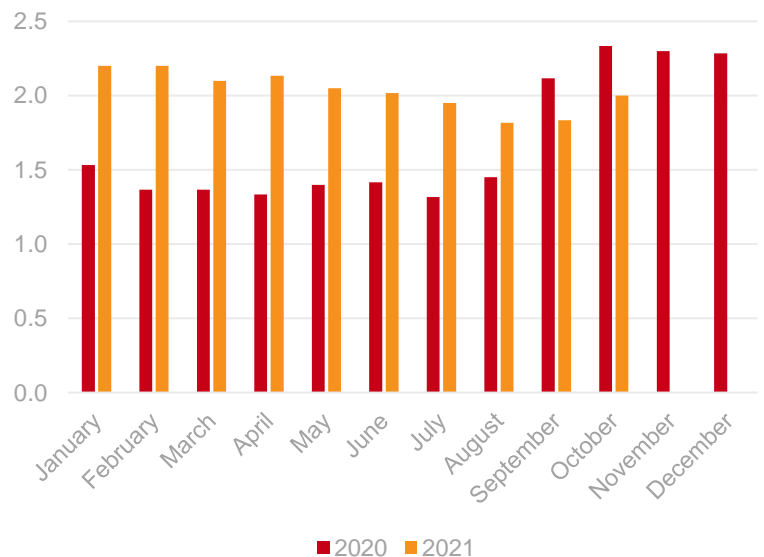
January 2020 - October 2021



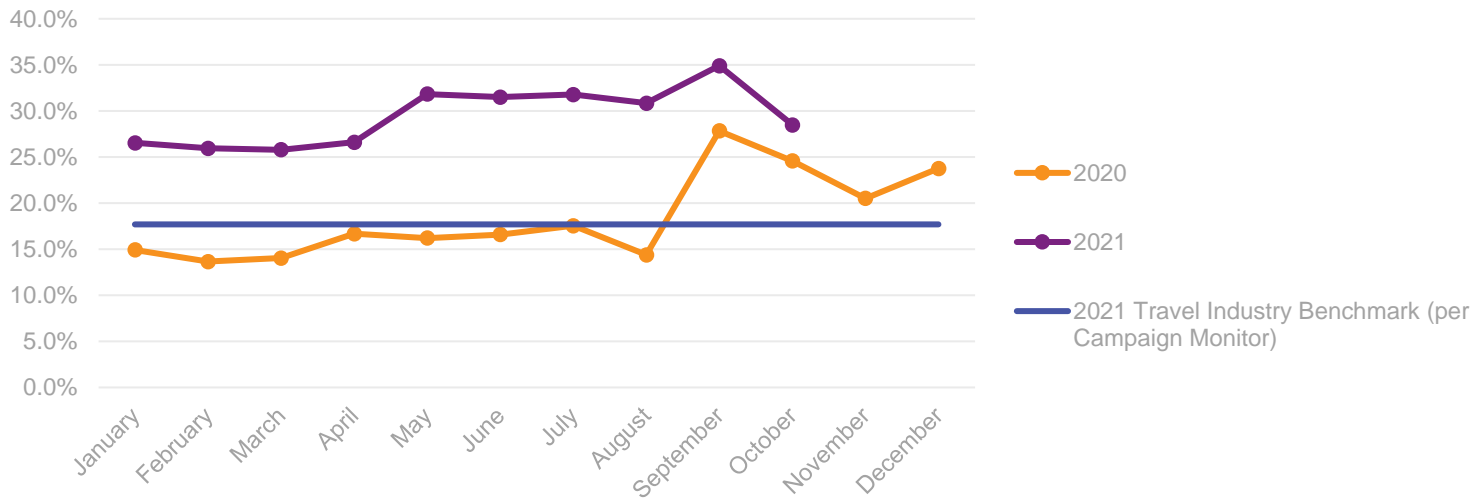
Website Engagement
 Sitewide Total Average Session Duration
 In Minutes



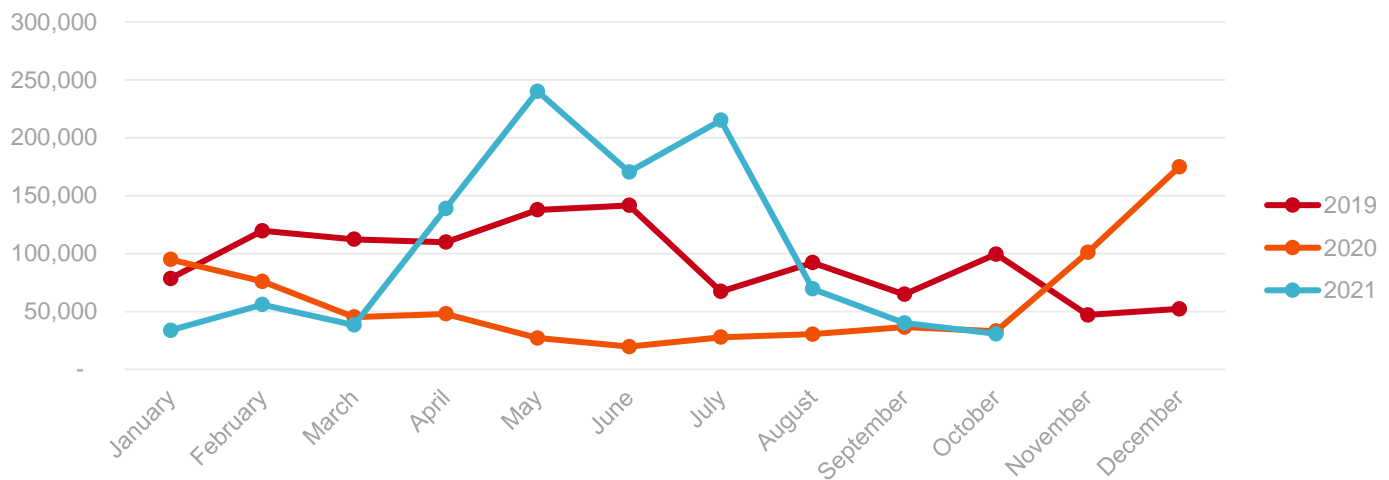
Website Engagement
 Organic Traffic (Direct & Organic Search)
 Average Session Duration
 In Minutes



Email Engagement % Open Rate



Social Engagement Likes, Comments, Shares



Takeaways

- When paid efforts increase, although site traffic increases, time on site tends to decline. We've seen this relationship at work once paid advertising resumed in the Spring of 2021, though average session duration has still tended to be above levels from before the launch of the new site.
- Average time on site from organic sources have remained fairly constant and above levels from prior to the launch of the new site, which is an indicator that the new website is more engaging.
- Our email audience has continued to engage well with our content, performing well above benchmark levels.
- The social media space was challenging to navigate in 2020, as we were not only impacted by a global pandemic, but the volatile socio-political environment. When paid efforts did resume (in the Fall of 2020 and Spring/Summer of 2021), more people could be reached, resulting in better engagement.



NEVADA COMMISSION ON TOURISM NOTICE OF PUBLIC MEETING

Meeting of the Marketing Committee
Thursday, November 18, 2021 - 9:00 A.M.

MEETING LOCATION:

<https://us02web.zoom.us/j/88215045565?pwd=Q1lqNUxCa1dnL21zay9FQ3hmZDIiUT09>

Meeting ID: 882 1504 5565

Passcode: 686138

COMMITTEE MEMBERS

Fletch Brunelle, Chair

Christina Erny | Carl Ribaudó | Deny Dotson | Cynthia Mun

This meeting is in compliance with Nevada Open Meeting Law and has been properly noticed and posted at a minimum of three of the following locations:

Nevada Commission on Tourism, Carson City, Nevada | Legislative Counsel Bureau, Carson City and/or Las Vegas, Nevada | Nevada State Museum, Las Vegas, Nevada | Nevada State Library, Carson City, Nevada | Windmill Library, Las Vegas, Nevada | Reno Sparks Convention and Visitors Authority, Reno, Nevada | Las Vegas Convention and Visitors Authority, Las Vegas, NV |

www.TravelNevada.biz | www.notice.nv.gov

STATEMENT OF THE COMMISSION

- Action may be taken on those items denoted "For Possible Action".
- Items on this agenda may be taken in a different order than listed.
- Two or more agenda items may be combined for consideration.
- An item may be removed from this agenda or discussion relating to an item on this agenda may be delayed at any time.
- Public comment will be allowed at the beginning and at the end of the meeting. Because of time considerations, the period for public comment by each speaker may be limited to 3 minutes at the discretion of the chair, and speakers are urged to avoid repetition of comments made by previous speakers.
- No action may be taken on any matter brought up under public comment until that matter has been specifically included on an agenda as an item upon which action may be taken (NRS 241.020).
- Meetings are audio-recorded as part of the public record. Speakers are requested to identify themselves before speaking.
- Note: Please provide NCOT with electronic or written copies of testimony and visual presentations if you wish to have complete versions included as exhibits with the minutes.

AGENDA

A. Opening

- A1. Call to Order and Confirmation of Proper Posting – Fletch Brunelle, Chair
- A2. Roll Call and Determination of Quorum – M.E. Kawchack, Deputy Director
- A3. Opening Comments – M.E. Kawchack, Deputy Director

B. Public Comment

Public comment is welcomed by the Commission. A period of public comment will be allowed at the beginning and at the end of the meeting. Because of time considerations, the period for public comment by each speaker may be limited to three (3) minutes at the discretion of the Chair, and speakers are urged to avoid repetition of comments made by previous speakers.

C. **For Possible Action** – Approval of Minutes

Approval of the June 9, 2021 NCOT Marketing Committee Meeting Minutes.

D. **For Discussion Only** – Introduction of new staff

Nevada Division of Tourism welcomes Mikalee Byerman, Chief Marketing Officer and Anton Eckert, Chief Industry Development Officer.

E. **For Discussion Only** – Integrated Marketing Effectiveness Study results

Omnitrak will present results of the FY21 Integrated Marketing Effectiveness Study.

F. **For Discussion and Possible Action** – Report on FY22 Q1 campaign

Our integrated agencies will present campaign results and opportunities. The committee may be asked to approve next steps.

G. **For Discussion Only** – Other updates

For the committee's information, the industry development calendar and earned media update will be presented. We will also take a look at upcoming digital development projects.

H. Committee Comments

I. Public Comment

Public comment is welcomed by the Commission. A period of public comment will be allowed at the beginning and at the end of the meeting. Because of time considerations, the period for public comment by each speaker may be limited to 3 minutes at the discretion of the Chair, and speakers are urged to avoid repetition of comments made by previous speakers.

J. **For Possible Action** – Adjournment

The public may acquire this agenda and supporting materials, pursuant to NRS 241.020(2) by contacting M.E. Kawchack (775) 687-0614 or by email to mkawchack@travelnevada.com. Materials are available online at travelnevada.biz.

Persons with disabilities who require special accommodations or assistance at the meeting should notify M.E. Kawchack at the Nevada Division of Tourism at (775) 687-0614 or mkawchack@travelnevada.com.