TRAVEL NEWADA MARKETNG COMMITTE MEETING

June 1, 2023



AGENDA

FY24 INTEGRATED STRATEGY

- FY23 Review + Insights
- Brand Research + Positioning Evolution
- FY24 Approach

FY24 CREATIVE RECOMMENDATION (for possible action)

- Brand Position
- Brand Line and Campaign Concepts

FY24 MEDIA RECOMMENDATION (for possible action)

- Paid
- Earned



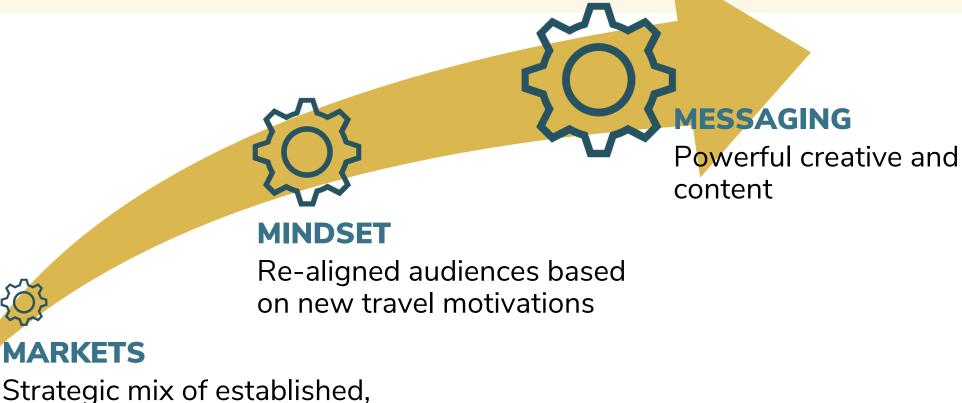




FY24 INTEGRATED STRATEGY

FY23 GOALS & PRIORITIES

Building on the success of FY22, our goal in FY23 has remained getting visitors to spend more and stay longer by optimizing our approach.



MARKETS

emerging & new markets

FY23 INSIGHTS

Recent IME data shows that, overall, it's working.

- People are SPENDING MORE and STAYING LONGER
- Each market is responding differently to different tactics
- Chicago and Portland are just gaining momentum

What helped us achieve this

- Strategic mix to approaching new markets
- Alignment with evolving traveler needs
- Engaging, content-first media partners & campaign-approach (SSR)

Where there is room to grow

- EVOLVE OUR AUDIENCE PROFILES to enable more meaningful connections
- Be more PRECISE WITH PERCEPTION-SHIFTING creative messaging and direction
- INTEGRATED ALIGNMENT on messaging and content focuses through the year

FY24 STRATEGY

PRIMARY OBJECTIVE: shift perception in a way that continues to encourages people to spend more and stay longer

WHICH PERCEPTIONS?

- Has a variety of things to see and do (outdoor recreation opportunities, and more than deserts)
- Offers off-the-beaten path experiences/local culture & history (beyond Reno and Las Vegas; only-in-Nevada experiences)
- Offers experiences for someone like me/welcomes diverse visitors (spotlighting the diversity of residents and visitors throughout the state)

Offers experiences for someone like me	+19 pts	57% —— 76%
Off-the-beaten path experiences	+18 pts	46% —— 64%
Local history and culture	+18 pts	48% ——● 66%
Easy to explore/sightsee by car	+15 pts	58% — 73%
Outdoor adventure activities	+15 pts	55% —— 70%
Offers road-trip opportunities	+14 pts	57% 🗨 71%
Has diverse landscapes	+15 pts	51% —— 66%



APPROACH CUSTOMIZATION MATRIX

MARKETS

Strategic mix of established, emerging & new markets, each of which has a custom blend of tactics and messages



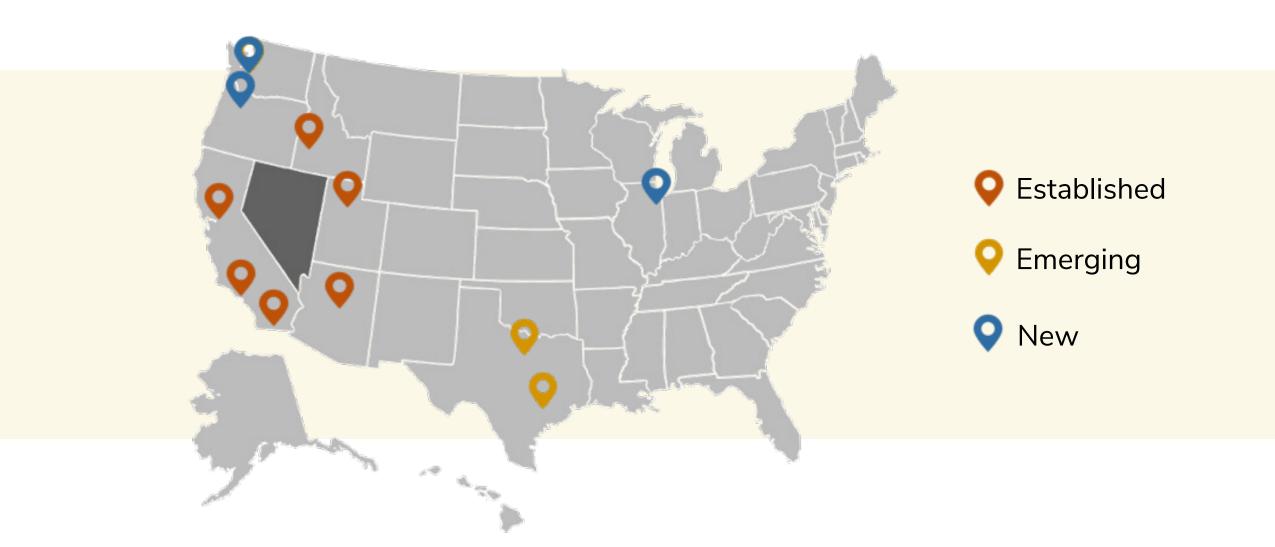
Strategically developed creative that focuses on those specific perception shifts

MINDSET

Honing our audiences to speak more directly to those whose interests align with priority Nevada offerings

DOMESTIC MARKETS







MARKET APPROACH

Defend our core ESTABLISHED markets

- Maintain our strong current position as a destination of choice in established markets to guarantee consistent tourism revenue; when possible, deepen our share of those markets by speaking to their multi-cultural populations
 - Sacramento, San Francisco, LA, Boise, Phoenix, Salt Lake City and San Diego

Stake our claim in EMERGING markets

- Increase our market share where travel intenders are increasingly raising their hands since pandemic
 - Dallas-Ft. Worth and Houston

Grow our **NEW** markets

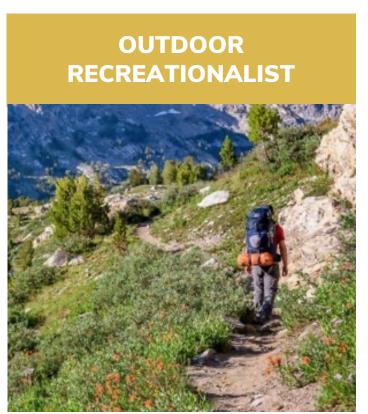
- Continue momentum in priority markets and build brand perception to the emerging market levels
 - · Seattle, Chicago, and Portland

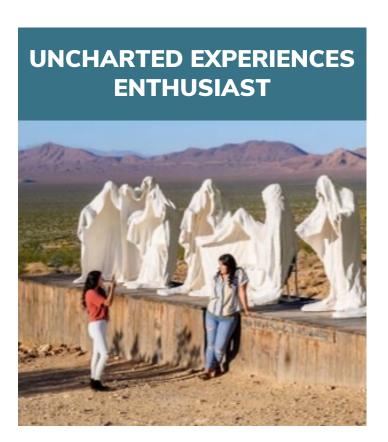


MINDSET - THE EVERYDAY ADVENTURER









From Everyday Adventurer to Expert Explorer



THE EVERYDAY ADVENTURER

- Leveraging key learnings from Destination Analysts, MRI-Simmons and more, we are evolving our audience profiles to ensure more meaningful connections between creative and media.
- Our goal is to more clearly define who each of our audience segments is so that we can speak more directly to those whose interests align with priority Nevada offerings.





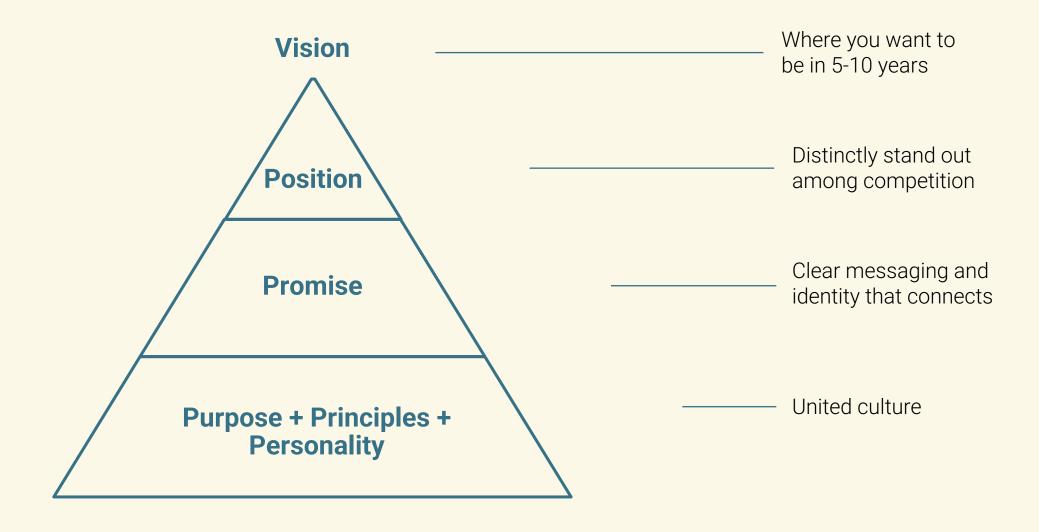




INTEGRATED STORYTELLING

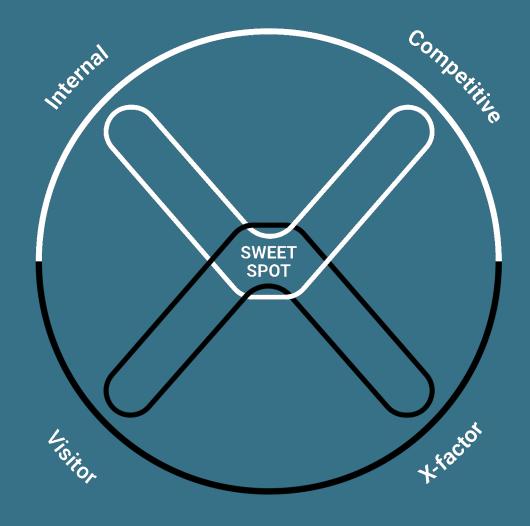
- An integrated content calendar ensures alignment on priority messaging throughout the year.
- While Travel Nevada is covering all priority topics year-round, there are opportunities to spotlight topics through hero content or campaign pushes at certain moments in time.
- Our recommendation is to lean into those big moments that align with our audience mindset, but then layer in content themes that support our overall strategy of shifting perception.

NOBLE BRAND PLATFORM





NOBLE DISCOVERY MODEL







DISCOVERY SOURCES

- DTCA Strategic Plan
- Destination Analysts Website Usability Study
- Destination Analysts Brand Position Study
- Omnitrack IME Report
- TN Stakeholder Brand Survey
- Competitor Analysis of
 Western/Intermountain States: OR, CA,
 UT, ID, WY, CO, AZ, NM, MT, SD +TX, FL
- BVK, Green Rubino & TN Brand Audit

- MRI-Simmons Target Audience Research
- Resonate Audience Profile Data
- TN Stakeholder Brand Workshop
- Wiser Insights Quant Research Studies
- Various academic Research Studies on cultural, market and industry trends
- Experience from serving as Travel Nevada's digital agency since 2018
- First hand knowledge from living, working and recreating in Nevada ourselves



BRAND INSIGHTS

Public Lands

Nevada's land is the people's land, to explore and discover.

The Desert

Nevada is one, and deserts are magical, surprising places.

Excitement > Rugged

People perceive Nevada as exciting first.

Doing

To truly do Nevada, you first have to be willing to do.

Las Vegas & Reno

Vegas and Reno dominates visitors minds, and that's ok.

Outdoor Rec +

Nevada is appreciated for outdoor recreation, but it is loved because those activities play into a larger theme of variety—a key characteristic for the state.

Awe & Adventure

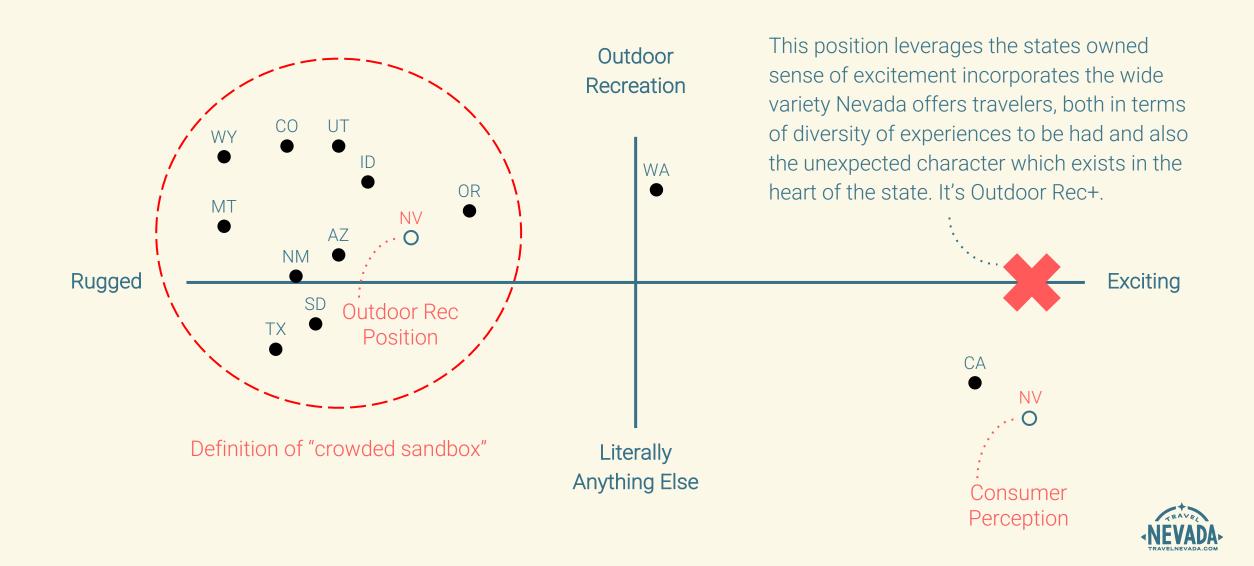
Nevada's assets are highly motivating for visitors who seek awe and reflection and a diversity of exciting adventures.

Contrasts & Transformations

Nevada's uncommon, contrasting character spark elicits transformative travel experiences.



BRAND INSIGHTS



BRAND PURPOSE

TO SHARE THE HEART OF NEVADA.

To share the heart of Nevada is to share our huge-hearted story with the world, inviting others in to be surprised, to be challenged, to be delighted and to leave changed.

It's to inspire the world to explore our beautifully uncommon backyard and discover our curious character—and characters—in their own time, in their own way.

To share Nevada's heart is to draw the world in, welcoming new ideas and new perspectives, new resources and new opportunities, which enrich our communities and brighten our future.

The Heart of Nevada is our everything—our passion, our pride, our land and our people—and in sharing it we welcome the world to see our Nevada in a new light.



BRAND PERSONALITY





BRAND POSITION

NEVADA IS A LITTLE OUT THERE.

The heart of Nevada, literally and figuratively, is a little out there. It lives out in the wild open landscape, beyond the neon glow, where the state's inspiring scenery, rich history, outdoor recreation and hidden gems can be explored and uncovered, and-being a little out there-it requires a willing spirit and a sense of adventure to experience. Similarly, Nevada's heart is a little odd, a little offbeat and a little out there, too, and it demands an uninhibited sense of curiosity to love and appreciate the uncommon variety-the character and characters-that make the Silver State a surprising place to explore. In this land of anything and everything, to truly do Nevada you have to be willing to get a little out there.



BRAND PROMISE

THE SPACE TO BE

Nevada is a space to explore and adventure, to take risks and try something new, to meet someone interesting or to discover something strange, to feel intrigued and to feel alive—and to be left forever better for it. Out in Nevada's heart is a space both historic and here-and-now, down-to-earth and out-of-this-world, neon-lit and starlit, too, with cities erupting from the wide-open nowhere. Nevada is a space for the wild-of-heart and the curious-of-mind, for those who wonder and those who wander, for the night owls and the early birds. It's the space to express yourself and to be who you want to be—in your own way and in your own time. Out there amongst towering peaks and valleys of fire is a different kind of space, awe-inspiring and exciting, and when you get a little out there, it's yours to explore.



BRAND PROMISE

THE SPACE TO BE / PROOF POINTS

- The state's awe-inspiring natural spaces means lots of space to breathe, move and to take it all in.
- 60 million acres of public land offer an openness to enjoy the space in your own way.
- Nevada features a diversity of outdoor adventure playgrounds—hiking, climbing, skiing, OHV, road trips, horseback, and more—activities which require space in their own right.
- The state's sense of scale—feeling small amidst an expansive landscape—evokes a sense of awe and provides the space for reflection.

- Nevada's you-do-you attitude offers an accepting space and the freedom to be yourself.
- If it wasn't for the state's space, our hidden gems wouldn't be hidden-meaning there's lots to explore and discover.
- Nevada is filled with unexpected contrasts and uncommon variety, lending the power to create transformational travel experiences.
- To explore Nevada's space requires a willing, committed spirit—when one commits themselves they become open to new experiences and open to change.

BRAND CAMPAIGN CONCEPTS

SLIDES AVAILABLE 5.30.23

FY24 MEDIA PECOMMENDATION PAID + EARNED

FY24 MEDIA STRATEGY

PAID: Deploy an always-on, omnichannel campaign that reaches potential travelers in the moments that matter

- Evolve and optimize high-performing tactics from FY23
- Expand successful partnerships and follow consumer media habits
- Capitalize on a major year of cultural events hosted in Paradise, NV
- Localize "Get a Little Out There" in new & emerging markets through activations and unique placements

EARNED: Generate buzz for travelers, primarily those in the dreaming and planning phases of the travel journey, with **trusted third-party channels** using key messages that **shift the perception** of Nevada

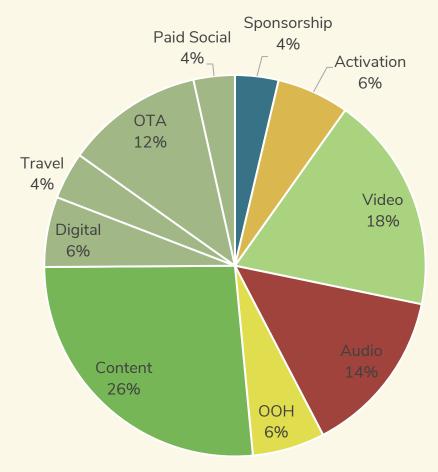
- Execute perception-shifting PR/social campaigns
- Secure third-party testimonials
- Customize story-lines and messages for media by audience/market
- Conduct always-on storytelling/media outreach to stay top-of-mind



MEDIA - PAID

- \$10.5mm MKT02
 - \$408k Account Mgt
 - \$200k Travel Nevada Co-Op
 - \$1mm Discover Your Nevada Campaign
 - \$250k Influencer Marketing
 - \$95k Arrivalist
- \$8.546mm domestic paid media

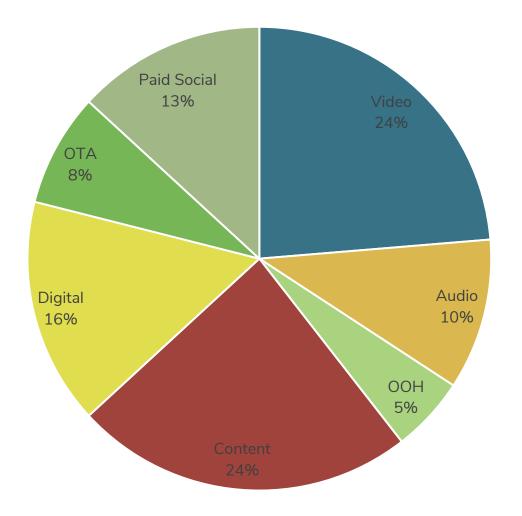
Planned Domestic Media Mix





DISCOVER YOUR NEVADA 2.0

- Deploy an always-on, omnichannel campaign that inspires Nevadans to explore, cherish, and celebrate their state outside its major metros
 - Continue local media partnerships
 - Utilize the purchasing power of our Domestic media buy to partner with national publications
 - Localize what "Get a Little Out There" means to both Northern and Southern Nevadans and their perceptions of Everyday Adventure





FY24 PAID STRATEGY

Continue FY23 Momentum



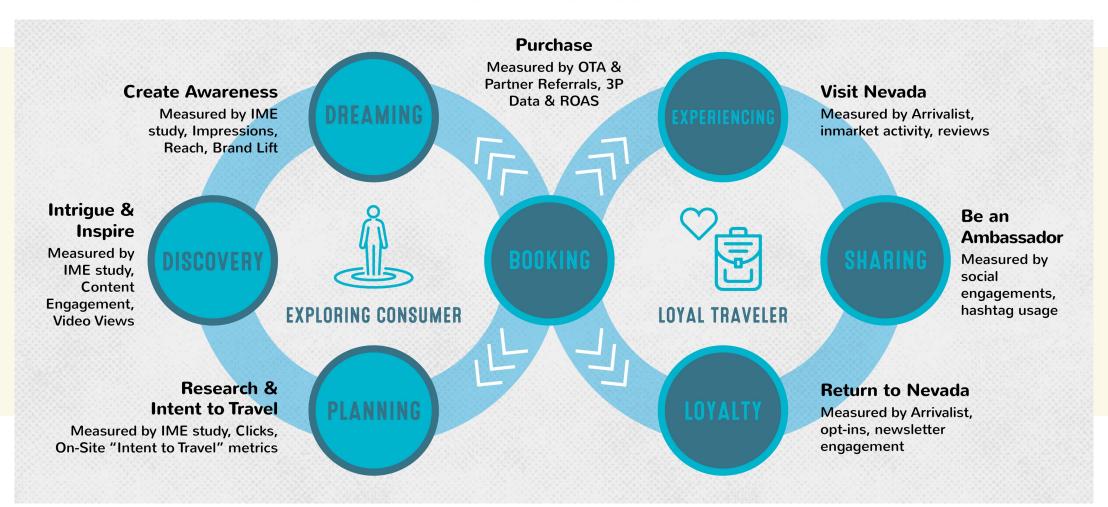
Q1	Q2 Q3			Q4	
Asset Bridge	New Campaign Soft Launch		New Campaign Full Launch		
			New Markets Campaign		
			N	ew Video Assets	
		_			

Always On Tactics

New Content Partnerships & Tactics

TRAVEL JOURNEY

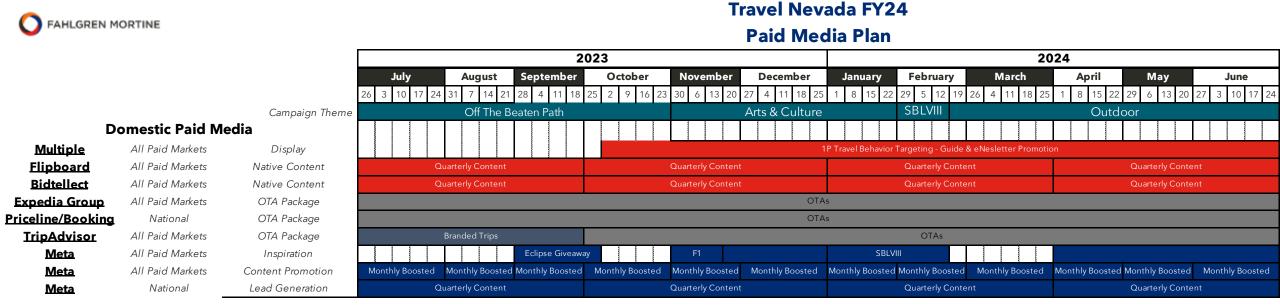
Integrated storytelling that moves consumers through the decision journey and builds the brand. With our campaign and media strategy defined we produce advertising and content across the ecosystem in a cohesive, integrated way that surrounds the consumer in compelling ways, driving to engagement and conversion.



PLANNING - BOOKING - LOYALTY

ALWAYS ON

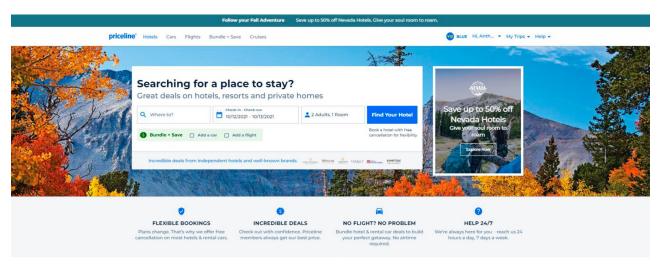
Deliver messaging directly to potential travelers booking with OTAs, helping them to choose Nevada. Show our target audience that Nevada has a variety of things to see and do through website and social content promotion.



PLANNING – BOOKING - LOYALTY

OTAS

In FY22, travelers exposed to Travel Nevada's marketing booked over \$139mm with our OTA partners. Throughout our campaign, we work with our OTA partners to optimize individual placements by their effective ROAS on each partner's platform. We also direct booking traffic to branded destination pages, where Nevada messaging is reinforced, and competitive destinations cannot advertise.



March 2024: Nevada Week

June 2024: Choose Your Summer

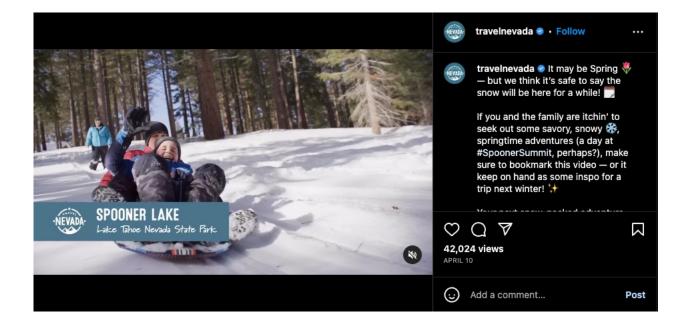
Adventure, Sponsored by Travel Nevada

PLANNING - BOOKING - LOYALTY

PAID SOCIAL

Our Paid Social strategy has 2x core always on components: lead generation and content promotion. To Date, Meta has generated 8,850 leads and we've reduced our CPL by 42%. Monthly organic boosts have reached over 1.7mm within our target audience.











NATIVE

New Tactics - Flipboard

- Turn-key TravelNevada.com content
- Also able to promote our 3P content
- Travel content takeover
- Wanderlust newsletter integration

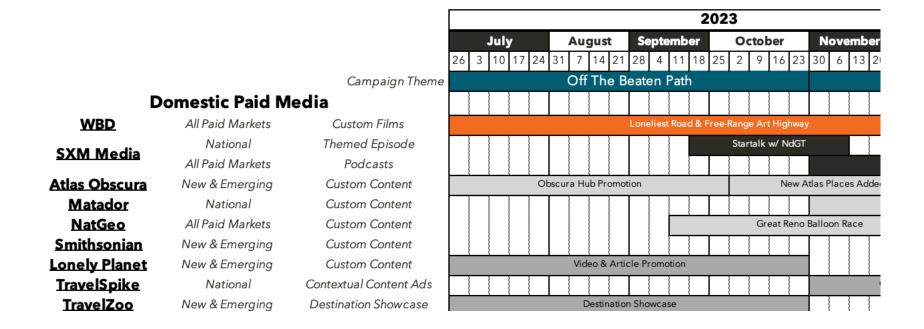




DREAMING - DISCOVERY - PLANNING

BRIDGE

Continue FY23 momentum through September, utilizing the amazing assets recently created to their fullest. Expand our impact with a select few partnerships that don't require new creative production.



DREAMING – DISCOVERY - PLANNING

BRIDGE



Nevada Obscura

Explore the Weirdest, Wildest West

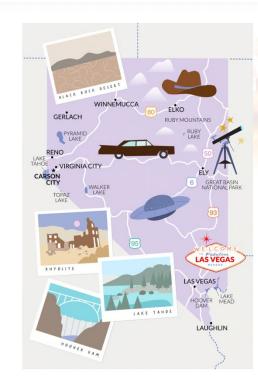
At Atlas Obscura, we believe there is something new to discover every day, all over the world—especially in Nevada. Explore the Weirdest, Wildest West and enjoy unique off-the-beaten-path places, curious finds, and wondrous stories from the Silver State.

SPONSORED BY



S ure, Las Vegas will always have a few tricks up its sleeve — after all, every blockbuster magician on earth takes up residence there or passes through. Still, you've got a pretty solid idea of what the city's got in store for visitors. The rest of the state, though? Not so much. Odds are, if you've never been to **Nevada** (or you've only ever been to Vegas), everything else is a bit of a mystery. And actually, that's not a bad take.

Mystery defines a lot of the state's top travel experiences in the best possible ways, whether you're into ghost towns, aliens or just the mysteries of the universe (the local astro-tourism scene is, well, stellar). Then again, the wild beauty of the terrestrial landscapes is enough to make you wonder at the power of nature. And the adventures that these environments foster can be truly transformative. So by all means, spend some time on the Strip, but consider that just the starting point of an epic journey. The rest of Nevada beckons — and here's how to heed that call.





CUSTOM PODCAST

The Great American Eclipse & The Darkest Skies in the USA

- Science-themed topic
- Nevada experts can be guest interview





CUSTOM CONTENT

Josh Cogan Returns to Nevada

- With his wife and two kids to experience The Great Reno Balloon Race
- They'll also spend a few days enjoying & showcasing the family-fun adventures perfect for our target audience



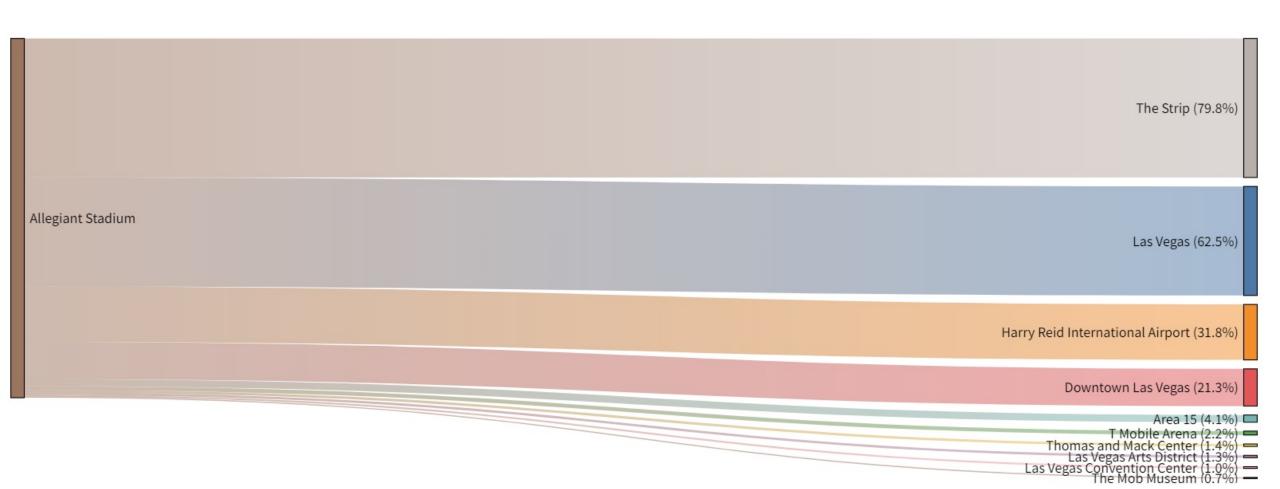
TRAVEL

Every year the spirit of the American West is awakened in Nevada

Join National Geographic Photographer Josh Cogan as he captures the National Cowboy Poetry Gathering in the small town of Elko

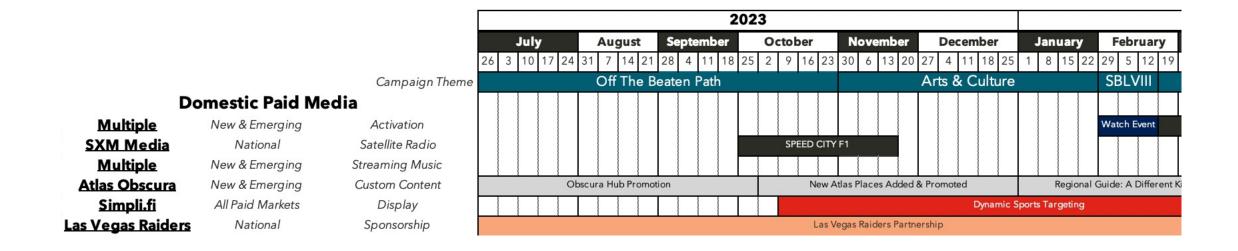
DISCOVERY

SPORTS



SPORTS

Paradise Nevada will attract the sporting world's attention in FY24. Bookended by the cultural spectacles of F1 and SBLVIII, travelers will flock to Southern Nevada all winter for regular season games. Travel Nevada can capitalize on this increased attention to change perceptions and highlight POIs outside of Vegas.





LAS VEGAS RAIDERS

Get a Little Out There at Allegiant Stadium

 2023 season partnership that includes standard media elements and sponsorship of an away game, but is focused around a sponsorship activation during a Raiders home game

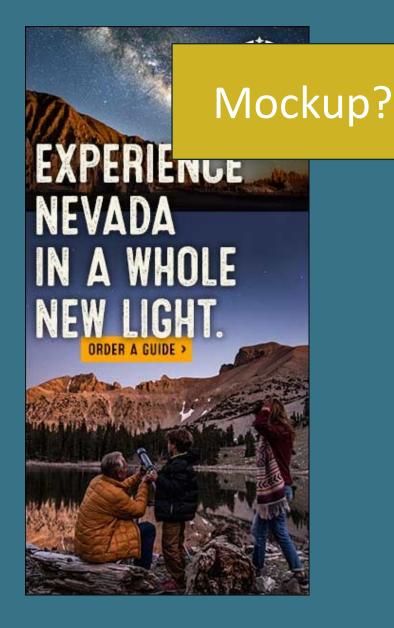




Follow The News Cycle

- Reach our regular target audience before, during, and after their team plays Vegas
- Also during peak F1 & SBLVIII coverage
- Creative & Landing Page focused on hub & spoke





SUPER BOWL WATCH PARTIES

Capitalize on Super Bowl excitement and additional media exposure to reach potential visitors in select new and emerging markets.

Three execution options are below:



IN-MARKET WATCH PARTIES

- Host "Virtual Vegas Watch Parties" in new/emerging markets
- Experiential elements throughout event mirroring Neon to Nature road trip POIs
- Leveraging a media partner for incentives (sweepstakes to win trip) and promotion

Only first option?

or

WIN A WATCH PARTY IN VEGAS

- Execute contest for target market residents to win trip to Las Vegas for a Super Bowl Watch Party
- Experiential elements throughout event mirroring Neon to Nature road trip POIs
- Opportunity for in-state partners, commissioners, etc. to attend as Nevada experts
- Leveraging a media partner for incentives (sweepstakes) and promotion

or

INFLUENCER FAM

- Invite a small group of travel influencers to Las Vegas for a Super Bowl watch party then take the Neon to Nature road trip
- Gather assets for future efforts targeting sporting event attendees coming to Las Vegas
- Option to create a sweepstakes where one winner in each new and emerging market can win their trip

NEW CAMPAIGN

STREAMING VIDEO

Showcase the Silver State on the largest screen in the home.





AUDIO

Inspire & intrigue within our audience's favorite podcasts and playlists.







CUSTOM CONTENT

Continue to produce amazing content, distributed where our target audience spends their time.











CUSTOM CONTENT

ATLAS OBSUCURA

- 5x places added to the Atlas
- Custom themed podcast episode

MATADOR

 "Adventure Made Easy" custom video series (hero + short form)

NATGEO

- Tara Kerzhner @tarakerzhner showcases
 "Outdoor+" in the Ruby Mountains
- Custom article, photography and social videos

OUTSIDE

- 2x creators travel to Nevada (North & South) for "Only in Nevada Experiences"
- Social promotion of trips
- 2x custom articles using creator photography

SMITHSONIAN

- 2x custom articles
- Custom virtual event

TEXAS MONTHLY

- Choose your Nevada Adventure experience interactive article
- Travel Guide Sponsorship
- Polybaged Nevada Magazine & VG

TRAVELZOO

- 1x custom article added to the destination showcase
- Family Outdoor themed

DREAMING - DISCOVERY - PLANNING - LOYALTY

GET A LITTLE OUT THERE, CHICAGO











New & Emerging

New & Emerging All Paid Markets

New & Emerging

New & Emerging

National

National

All Paid Markets

New & Emerging

New & Emerging

National

All Paid Markets

New & Emerging

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All Paid Markets

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National

National

Audio

OTAs Travel **Publisher Content** Social

Multiple

Multiple

WBD

Multiple

SXM Media

Multiple

Atlas Obscura

Matador

NatGeo

Smithsonian

Outside

Texas Monthly

Lonely Planet

TravelSpike

TravelZoo

<u>Multiple</u>

Simpli.fi

Flipboard

Bidtellect

Expedia Group

Priceline/Booking

TripAdvisor

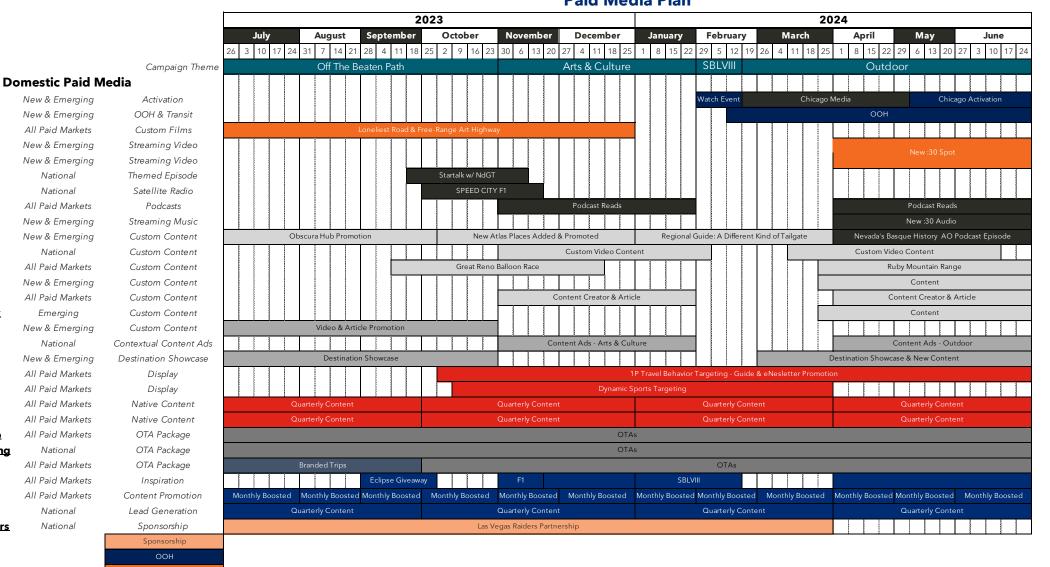
Meta

Meta

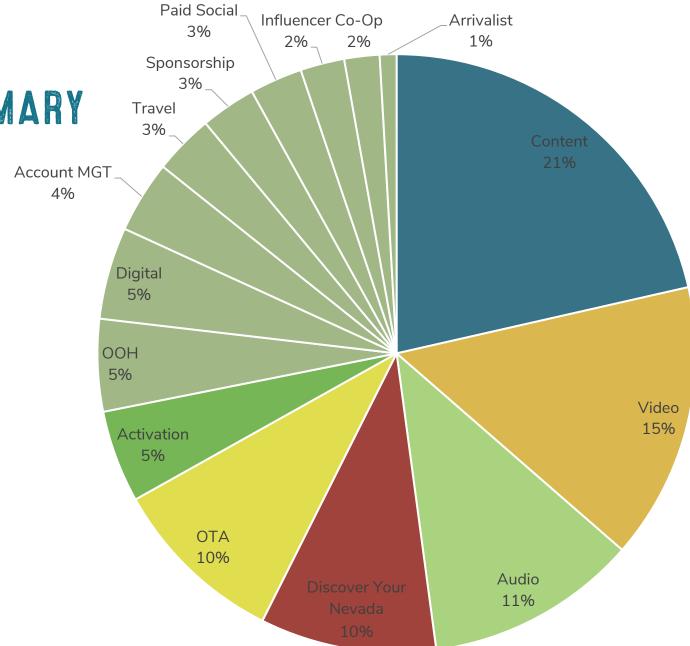
Meta

Las Vegas Raiders

Travel Nevada FY24 Paid Media Plan

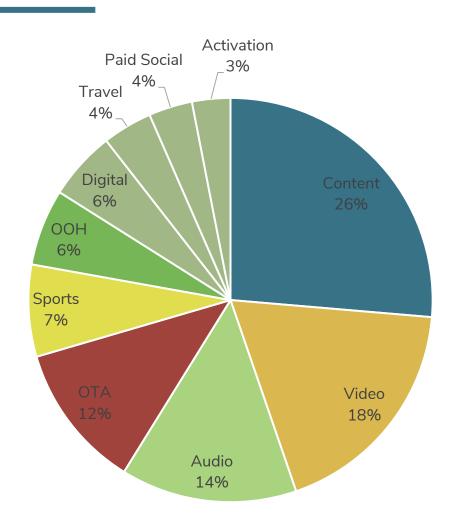


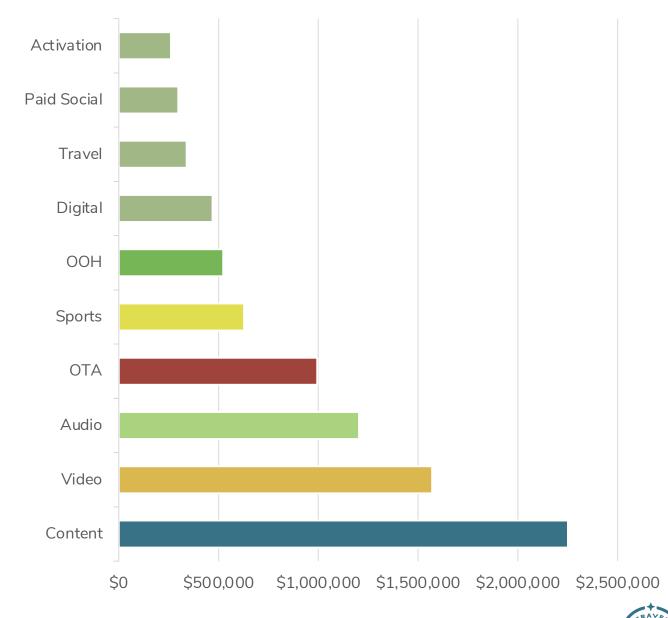
MKT02 BUDGET SUMMARY





DOMESTIC PAID BUDGET SUMMARY





FY24 EARNED STRATEGY

Generate buzz for travelers, primarily those in the dreaming and planning phases of the travel journey, with **trusted third-party channels** using key messages that **shift the perception** of Nevada

PERCEPTION-SHIFTING CAMPAIGNS

 Activations around key messages, events, etc. THIRD-PARTY TESTIMONIALS

MEDIA TARGETS

NATIONAL TRAVEL



POINTS OGUY

FodorśTravel

Traveler AFAR

NATIONAL CONSUMER





Digest

Smithsonian MAGAZINE



REGIONAL



PHOENIX

The Seattle Times

The Washington Post

San Francisco Chronicle

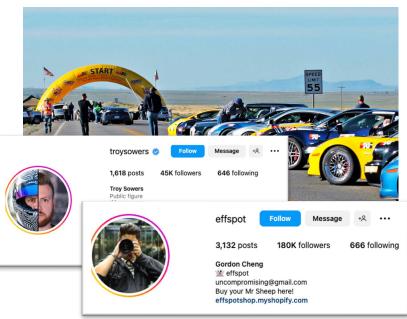
ALLEGIANT TAILGATE TAKEOVER

At a key home Raiders' game, Travel Nevada will create a custom, immersive experience that encourages attendees to "Get A Little Out There" in the rural parts of the state that are just off the strip.



FORMULA 1

Partner with racing influencers for a content creation trip during the Silver State Classic and other Nevada experiences along that route, then promote that content (in partnership with Paid) to Formula 1 fans in target markets.



HOW [VEGAS ATHLETE] DOES "NEON TO NATURE"

Engage a Las Vegas-based pro athlete for a custom broadcast segment that would be distributed to target markets and nationally.







PERCEPTION-SHIFTING CAMPAIGNS - CONTENT

OUTDOOR REC

Develop media-genic content that will both support travelers looking for outdoor rec offerings and be engaging for media.

OUTDOOR REC ITINERARY BUILDER QUIZ

Develop a quiz that uses existing Travel Nevada road trips, our identified outdoor rec offerings and input from a user on their adventure level to develop a "custom" itinerary.

NEVADA OUTDOOR REC CHALLENGE

An outdoor recreation bucket list spotlighting 5-10 of the greatest outdoor recreation experiences in the state and issue a challenge that encourages visitors to complete all of them.

EDUCATIONAL + DIVERSE ITINERARIES

Develop and release three different educational itineraries to be shared on TravelNevada.com and pitched to media; proposed as media and journalist FAM trips; and used as the basis of social media content from Travel Nevada.

- Basque POIs (Q2)
- Sustainable POIs (Q3)
- BIPOC & women's-owned businesses and POIs (note: Indigenous-owned businesses/POIs might merit their own itinerary) (Q4)



MEDIA + INFLUENCER FAMS

MEDIA

Themed group FAMs + themed individual FAMs for writers with diverging interests.

Themes:

- Annular Solar Eclipse
- Super Southern Nevada (Super Bowl/Neon to Nature)
- Basque



TIANA ATTRIDE
Social Media Editor,
AFAR. Covers unique
travel experiences and
destinations



JON PERINO
Senior Editor, Men's
Journal. Covers food,
travel, outdoor activities



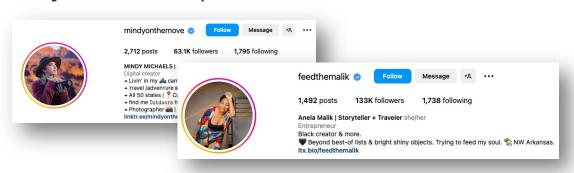
TERRY WARD
Freelance, CNN, Nat Geo,
Thrillist, Travel + Leisure.
Covers food, travel, culture,
outdoor activities

INFLUENCERS

Influencer partnerships to reach national and target regional audiences and audiences with niche interests, while also gathering important assets for other Travel Nevada marketing efforts

Hosting priorities:

- Recreate Responsibly messaging
- Diverse representation
- Content rights/video
- Subject matter experts



MEDIA MISSION APPROACH

Media missions offer us the opportunity to engage with multiple journalists at one time. These inperson connections are invaluable for relationship building over time and eventually placing stories with media.

In FY24, FM recommends approaching media missions in two key markets:

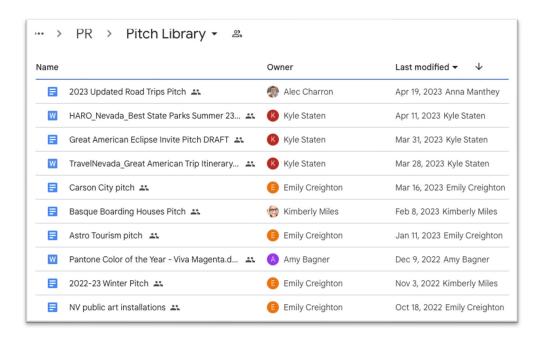
- New York (major media market): Media event; deskside meetings
- Chicago (new consumer market for Travel Nevada): Consumer event with earned media amplification; deskside meetings





TOP 100 WEEKLY OUTREACH

- Weekly outlet targets
- Power Hour pitch strategy sessions
- Pitch Bank



SEASONAL EVENT RELEASES

Quarterly events releases to be distributed to target drive markets encouraging short-lead visitation from those audiences.



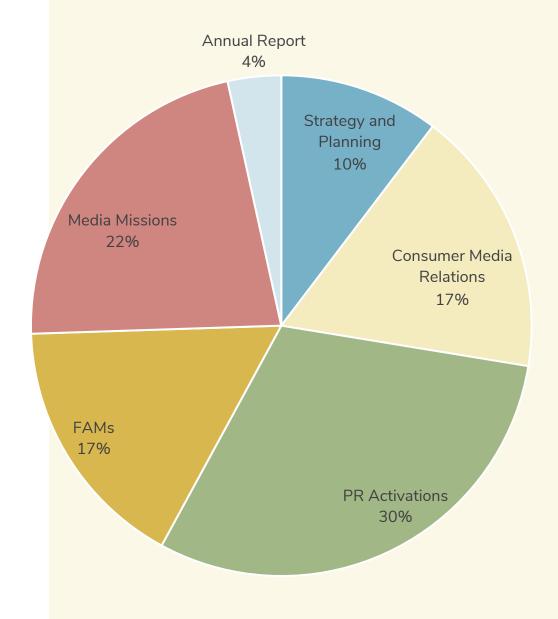






BUDGET LEVELS

- Strategy & Planning
- Consumer Media Relations
 - National media outreach
 - Media/Influencer vetting & partnerships
 - Wire releases
 - Reporting & analysis
- PR Activations
 - Allegiant execution/staffing
 - Formula 1 influencer program
 - Super Bowl watch parties
 - Athlete SMT
 - Educational itineraries
 - Outdoor Rec content
- FAMs
 - Media hosting/press visit
 - Influencers hosting, negotiations, etc.
- Media Missions NYC + Chicago
- Annual Report



TIMELINE NEXT STEPS

JUNE

- Marketing Committee approval
- IFC approval
- "Bridge" campaign work

JULY - OCTOBER

- Shoot/execute new brand creative
- "Sports" campaign work

NOVEMBER - JANUARY

- "Chicago activation" work
- "Outdoor" campaign work



#