



# NEVADA COMMISSION ON TOURISM

Tuesday, October 11, 2016  
12:00 P.M.

## MEETING LOCATION:

Grand Sierra Resort  
Carson Ballroom  
2500 E. Second Street  
Reno, NV 89595

Phone Conference Call Number:

**888-363-4735**

**Access Code 4878739**





**NEVADA  
COMMISSION  
ON TOURISM**

**Commissioners**

Lt. Governor Mark  
Hutchison,  
Commission Chair\*  
Cindy Carano, Vice Chair\*  
Ryan Sheltra\*  
Don Newman\*  
John Wagon\*  
Rossi Ralenkotter\*  
Jennifer Cunningham\*  
Herb Santos\*  
Mike Vaswani\*  
Dallas Haun\*  
Bob Morse\*  
Bob Stoldal  
Julia Arger  
Richard Arnold  
\*Voting Member

## NOTICE OF PUBLIC MEETING

Nevada Commission on Tourism  
Department of Tourism and Cultural Affairs

**MEETING LOCATION:**

Grand Sierra Resort  
Crystal Ballroom  
2500 E. Second Street  
Reno, NV 89595

**VIDEO CONFERENCE LOCATION:**

None

**TELECONFERENCE NUMBER:**

**888-363-4735; Access Code: 4878739**

**MEETING DATE:**

**Tuesday October 11, 2016 – 12:00 PM**

## AGENDA

THIS MEETING IS IN COMPLIANCE WITH THE "NEVADA OPEN MEETING LAW" AND HAS BEEN PROPERLY NOTICED AND POSTED AT THE FOLLOWING LOCATIONS:

Nevada Commission on Tourism, Carson City, Nevada  
Legislative Counsel Bureau, Carson City and Las Vegas, Nevada  
Nevada State Library, Carson City, Nevada  
Clark County Library, Windmill Branch, Las Vegas, NV  
Websites: [www.TravelNevada.biz](http://www.TravelNevada.biz) and [www.notice.nv.gov](http://www.notice.nv.gov)

- 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.
- 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.

## I. Roll Call

- A. Call to Order and Confirmation of Proper Posting – Cindy Carano, NCOT Vice-Chair
- B. Roll Call and Determination of Quorum– Cindy Carano, NCOT Vice-Chair

## II. 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.

## III. Presentations

1. The Division of Tourism contracted with four new offices during FY16. With the staff of the offices in Nevada for the Summit, this provides a good opportunity for Commissioners to meet these teams, gain insights through a market brief and learn the FY17 plans from each office. The following international offices will provide these presentations:
  - A. Australia – Market brief and plan presentation from Canuckiwi
  - B. Brazil – Market brief and plan presentation from Wolf Propaganda
  - C. China – Market brief and plan presentation from East West Marketing Corporation
  - D. India – Market brief and plan presentation from Sartha Global Marketing
2. Nevada Museum of Art – 7 Magic Mountains  
In FY16, the Division of Tourism, with approval by the Nevada Commission on Tourism, provided funding for the Nevada Museum of Art to create the Seven Magic Mountains public art installation in Jean, NV. The Museum will provide an update regarding the media coverage, visitation and general perception of the project and request for additional funding.

## IV. Reports

- A. Vice-Chair's Report
- B. Administration
  - a. Nevada Governor's Global Tourism Summit Agenda
  - b. 2016 Overview – Highlights from FY16
  - c. Quarterly Update – Review of the activities and accomplishments for the Division of Tourism during the first quarter of FY17
- C. Public Relations Update
  - a. Recap of recent media visits and coverage
  - b. Upcoming Legislative Session Update – Discussion around efforts to "Create and Convey Value" in advance of the session, ways to illuminate TravelNevada during the session and various internal and external communications strategies – The Abbi Agency, Bethany Drysdale
- D. Sales and Industry Partners Update
- E. Nevada Magazine Update

- F. Department Agency Updates
- Division of Museums and History
  - Nevada Arts Council
  - Nevada Indian Commission

## V. Upcoming Meetings

Commission Meeting Teleconference Only (approve grant funding)  
Wednesday, December 14, 2016  
1:00 p.m.

## VI. Commissioner Comments

## VII. 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.

## VIII. Adjournment – **For Possible Action**

The public may acquire this agenda and supporting materials, pursuant to NRS 241.020(2) by contacting Dee Chekowitz-Dykes, Executive Assistant, Nevada Commission on Tourism, (775) 687-0621 or via email to [ddykes@travelnevada.com](mailto:ddykes@travelnevada.com). Materials are available from the Nevada Commission on Tourism office, 401 N. Carson Street, Carson City, Nevada or on [www.travelnevada.biz](http://www.travelnevada.biz)

Persons with disabilities who require special accommodations or assistance at the meeting should notify Dee Chekowitz-Dykes at the Nevada Commission on Tourism at (775) 687-0621 or [ddykes@travelnevada.com](mailto:ddykes@travelnevada.com).



# Presentations

TRAVELNEVADA.COM ✨ #TRAVELNEVADA

The first part of the report discusses the current state of the industry and the challenges it faces.

The second part of the report discusses the proposed solutions and the benefits they offer.

The third part of the report discusses the implementation plan and the timeline for the project.

The fourth part of the report discusses the budget and the resources required for the project.

The fifth part of the report discusses the risks and the mitigation strategies for the project.

The sixth part of the report discusses the conclusion and the recommendations for the project.

The seventh part of the report discusses the appendix and the additional information provided.

The eighth part of the report discusses the references and the sources used in the report.

The ninth part of the report discusses the contact information and the way to reach the author.

The tenth part of the report discusses the disclaimer and the liability of the author.

The eleventh part of the report discusses the acknowledgments and the people who helped in the project.

The twelfth part of the report discusses the glossary and the definitions of the terms used in the report.

The thirteenth part of the report discusses the index and the location of the information in the report.

The fourteenth part of the report discusses the table of contents and the structure of the report.

The fifteenth part of the report discusses the executive summary and the key findings of the report.

The sixteenth part of the report discusses the introduction and the purpose of the report.

The seventeenth part of the report discusses the methodology and the approach used in the report.

The eighteenth part of the report discusses the results and the findings of the report.

The nineteenth part of the report discusses the discussion and the implications of the findings.

The twentieth part of the report discusses the conclusion and the final thoughts on the project.



# NEVADA

A WORLD WITHIN.  
A STATE APART.

## MARKET UPDATE AUSTRALIA & NEW ZEALAND SEPTEMBER 2016



### The year in review Politics

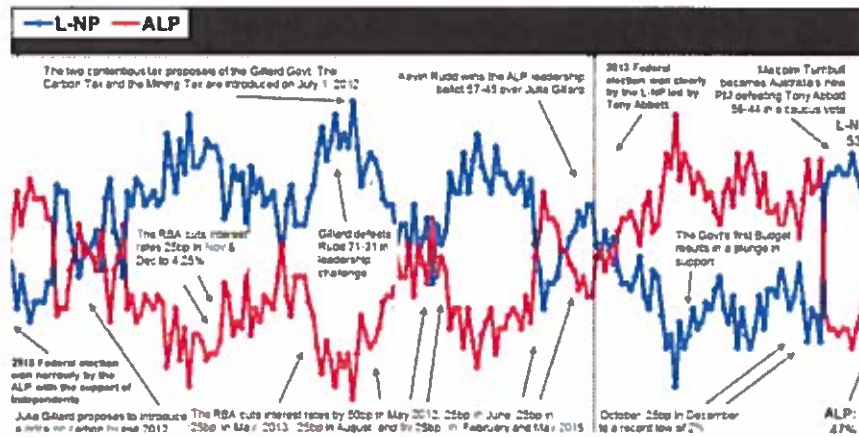


**Will Australia Keep Their Current Leadership. How Long?**  
 Labour Rudd, Kevin 03-12-07 to 24-06-10 : 2 years, 6 months, 21 days.  
 Deposed as Party Leader  
 Labour Gillard, Julia 24-06-10 to 27-06-13 : 3 years, 3 days. Deposed as  
 Party Leader  
 Liberal Rudd, Kevin 27-06-13 to 18-09-13 : 2 months, 22 days Defeated at  
 General Election  
 Liberal Abbott, Tony 18-09-13 to 15-09-15: 1 year, 11 months, 28 days  
 Deposed as Party Leader  
 Turnbull, Malcolm 15-09-15 to ??????



## The year in review Politics

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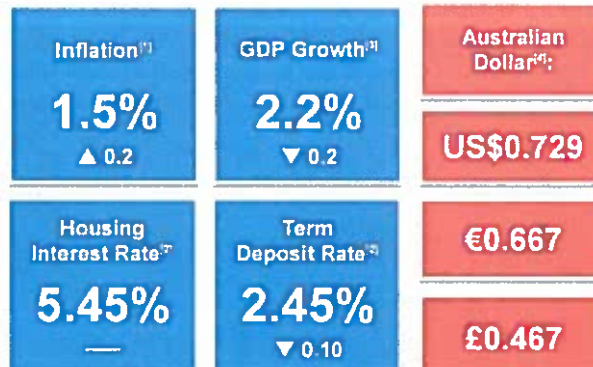


### Party Support

In early March L-NP support is 53% (up 0.5%) cf. ALP 47% (down 0.5%) on a two-party preferred basis. If a Federal Election were held now the L-NP would win.

## The year in review Economy – Consumer confidence

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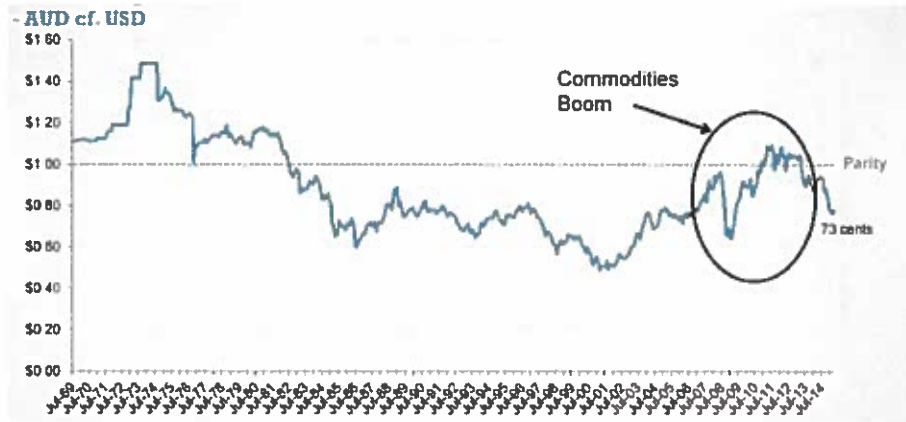
### SUMMARY

- Consumer confidence continues to bounce along at near-average levels.
- That's still a good sign for the spending side of the economy, given political uncertainty
- Strong employment and house prices are extra feel-good factors.
- House price expectations – at 4.4% – remain firm but not eye-watering.



## The year in review Economy – exchange rates (1969-2016)

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## The Australian Traveller Air Access ON THE RISE!

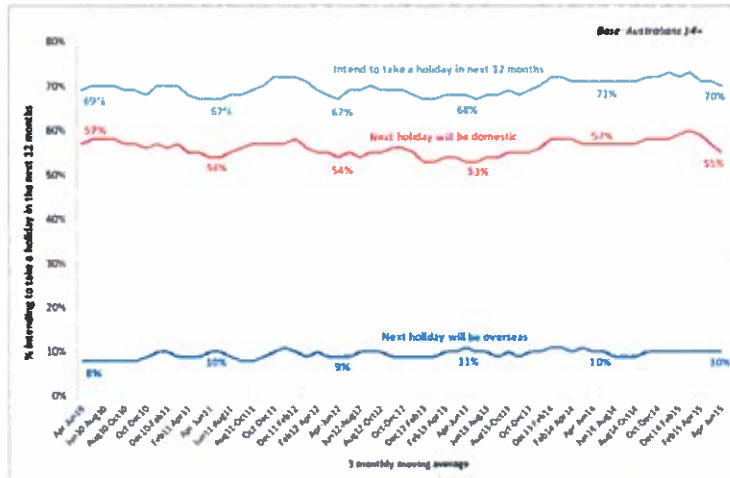
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Airlines	Flights
Qantas	<ul style="list-style-type: none"> <li>• Double daily services (A380/747) from Sydney, Melbourne and Brisbane to LAX (&amp; JFK via LAX)</li> <li>• 5 x weekly to Sydney to SFO (747) increasing to 6 x weekly in February 2016</li> <li>• 6 x weekly services (A380) from Sydney to DFW and daily from April 2016</li> </ul>
United Airlines	<ul style="list-style-type: none"> <li>• Daily services (777) from Sydney to LAX and SFO</li> <li>• Daily services (787) from Melbourne to LAX</li> <li>• Sydney's 777 services will switch to the newer Boeing 787 in March 2016</li> <li>• 3 x weekly Auckland to SFO (787-8) in July 2016 with daily (787-9) from November 2016</li> </ul>
Virgin Australia	<ul style="list-style-type: none"> <li>• Daily services (777) from Sydney and Brisbane to LAX</li> <li>• Codeshare with Delta Airlines</li> <li>• Launching additional MEL to LAX service April 4<sup>th</sup>, 2017</li> </ul>
Delta	<ul style="list-style-type: none"> <li>• Daily services (777) from Sydney to LAX</li> <li>• Codeshare with Virgin Australia</li> </ul>
American Airlines	<ul style="list-style-type: none"> <li>• Daily services (777) from Sydney to LAX</li> <li>• Daily services (787) from Auckland to LAX from June 2016</li> </ul>
Air New Zealand	<ul style="list-style-type: none"> <li>• Triple daily services (777) from Auckland to LAX</li> <li>• Daily services (777) from Auckland to SFO</li> <li>• 5 x weekly services (777) from Auckland to IAH</li> <li>• Can connect directly to/from 8 Australian cities</li> </ul>



## The Australian Traveller

### Australians intending to take a holiday in the next 12 months

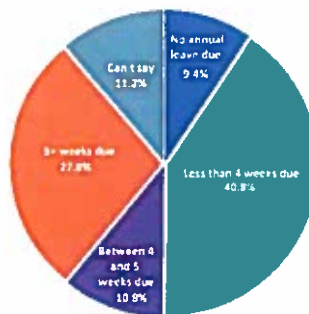


## The Australian Traveller

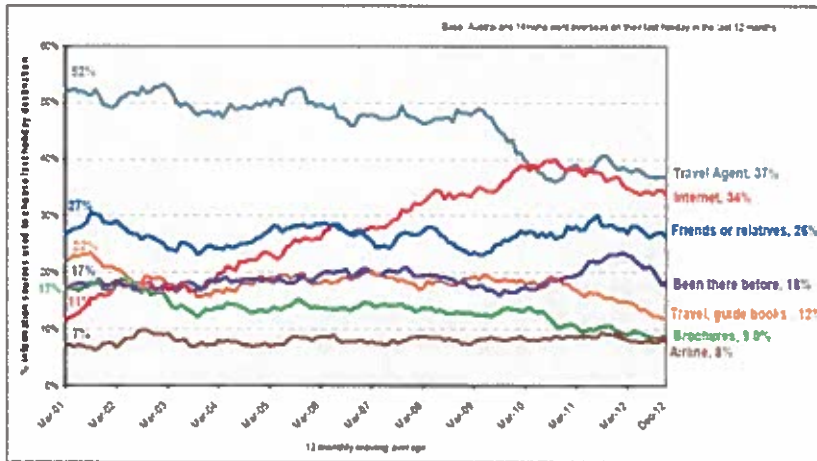
### Annual leave and travel motivators



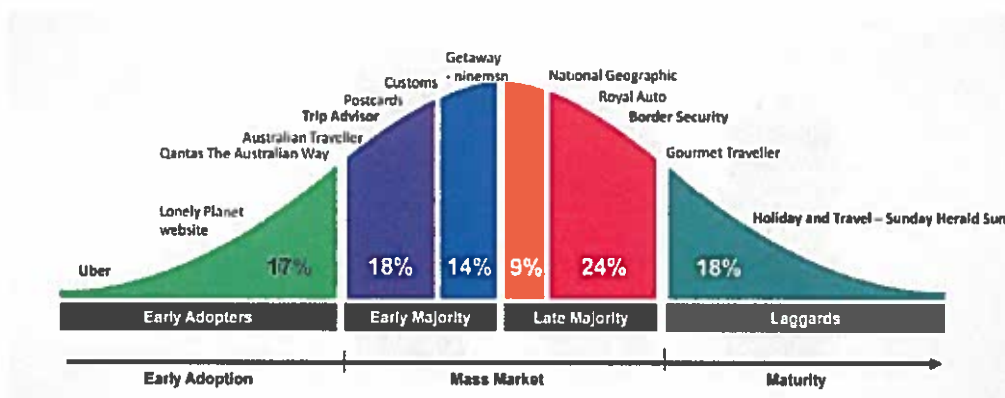
**123,510,000 days annual leave accrued!**



## The Australian Traveller Sources of travel information

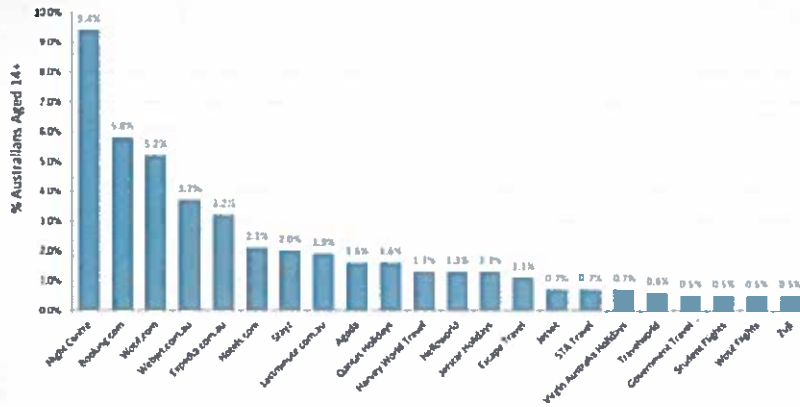


## The Australian Traveller Technology Adoption Segments



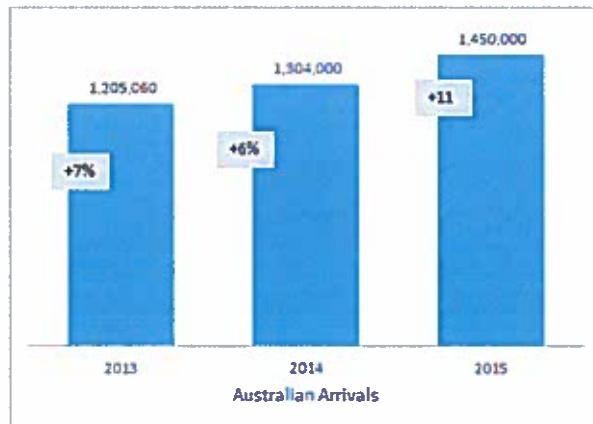
## The Australian Traveller

The importance of the travel trade –Travel Agents/Tour operators



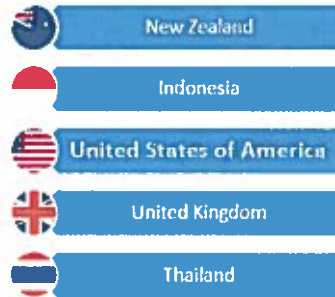
## The Australian Traveller

Trends in Australian Arrivals (VUSA Market Update 2016)



## The Australian Traveller Top Destinations for Australians

The United States ranks as the number one long-haul travel destination for Australians.



Source | Tourism Research Australia: Travel by Australians March 2016 Quarterly Results of the National Visitor Survey, Year ending December 2015



## The Australian Traveller Characteristics of Australian visitors to the U.S

Travel for vacation/holiday	68%
Visit Friends/Relatives	17%
Convention/Conference/Trade show	6%
Business	6%
Education	4%
Health Treatment	0.1%
Repeat visitors	71%
First time visitors	29%
Average age female	40 yrs
Average age male	42 yrs
Average length of stay	22.4 nights
Average # of nights in hotel/motel	13.8 nights
Advance trip decision (mean days)	159 days
Advance air travel reservations (mean days)	112 days

The majority of Australians travel to the United States for pleasure and visit throughout the year. The most popular months are between April-October and in December. Australians, on average, visit 2.2 states



## The Australian Traveller Activities participation



### Leisure Activities Participation\*

Shopping	92%
Sightseeing	91%
National Parks/Monuments	60%
Guided Tours	52%
Historical Locations	49%
Experience Fine Dining	46%
Small Towns/Countryside	46%
Art Galleries/Museums	44%
Amusement/Theme Parks	36%
Concert/Play/Musical	33%
Cultural/Ethnic Heritage Sites	31%
Nightclubbing/Dancing	27%
Casinos/Gamble	23%
American Indian Communities	13%

\*multiple responses

### Sporting / Outdoor Activities\* Participation

Sporting Event	30%
Water Sports	14%
Camping/Hiking	13%
Environ /Eco. Excursions	6%
Snow Sports	5%
Golfing/Tennis	4%
Hunting/Fishing	2%

\*multiple responses

The most popular activities for Australian visitors include shopping, sightseeing, visiting national parks & monuments, taking guided tours, visiting historical locations, experiencing fine dining, visiting small towns and the countryside, visiting art galleries & museums, visiting amusement & theme parks, attending concerts, plays & musicals, visiting cultural and ethnic heritage sites, and attending sporting events. In 2015, there was a 3% increase in Australians visiting art galleries and museums, attending sporting events, camping and hiking, and visiting American Indian communities.



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January 1<sup>st</sup>, 2016



# Achievements – Trade (Sales)

January 1<sup>st</sup> – September 30<sup>th</sup> 2016



### Excite Holidays Campaign In Market

- Total paid & unpaid room nights increased by 83%
- 5814 unique opens to EDM
- Agent incentive with over 200 entries received



- Nevada Winter FAM
- Bridget Fogarty from House of Travel Attends

- Trade exhibition / events
- Brisbane and Melbourne Top Agent event s

- Visit USA Australia
- Over 1200 Travel Trade Professionals
- 27 B2B Meetings with Wholesale Operators
- Access to 36 key Australia media at International Media Marketplace
- Created comprehensive week long meeting plan for David & Bethany



- Product Development Work
- Product development calls, training or discussion complete with: Ski Max, Blue Powder, Calder & Lawson, Drive Away Holidays, Flight Centre, Helloworld, House of Travel, Intrepid, Jucy, Pinpoint Travel Group, Sno N Ski, Travel Associates, Travelplan, Venture Holidays, Webjet



- Adventure World Campaign
- Campaign Signed Off & Agreed
- Initial Product Work done
- Nevada will be focused on in new USA Catalogue



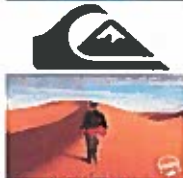
# Achievements – Trade (Sales)

January 1<sup>st</sup> – September 30<sup>th</sup> 2016



Integrated Consumer facing campaign with Essentially America, Intrepid, Ski Max, Quicksilver

- Ten page feature in May edition of Essentials America
- Integrated alliance partner through in store support, Quicksilver Website, Quicksilver social media (4.5M Fans) and eDMs



WIN a trip of a lifetime to Utah and Nevada!

Are you and your friends ever adventuresome? Just do you like Nevada in its natural and beautiful state? Well, that's what we have in mind for you. We have some great prizes for you, and we're looking for you to win them. We have some great prizes for you, and we're looking for you to win them. We have some great prizes for you, and we're looking for you to win them.

UTAH USA

IPW Appointments Successfully met with 75% of the attending Australian buyers



United airlines Trivia Events

- Sydney, Melbourne, Adelaide and Auckland events with prizes at each event



# Achievements – Trade (Sales)

January 1<sup>st</sup> – September 30<sup>th</sup> 2016



## United Airlines Online Ski Incentive

- Incentive ran from 1 June – 31 July 2016.
- Online Training modules to be completed by agents
- FAM to take place in March 2017
- 124 Agents completed to modules and scored over 86 %



NEVADA

From the sun-drenched mountains to the world-famous Vegas Strip, Nevada offers a wide range of experiences. Whether you're looking for a quiet getaway or a vibrant vacation, Nevada has it all.

United is excited to offer a special incentive for our valued customers. Book a round-trip flight to Utah or Nevada and receive \$100 towards ski gear. This offer is available on select flights and is subject to change without notice.



### Win one of 10 places on an educational ski trip to Utah or Nevada, flying with United Airlines.

From June 1 to July 31, United and participating ski resorts in Utah and Nevada are giving you an opportunity to win one of 10 places on a 10-day educational ski trip to Utah and Nevada. As well as an educational tour, you'll also receive a complimentary round-trip flight to the resort of your choice. To be eligible, you must complete the online training module, register as a new agent, complete the training module, and complete the online booking process. As a gift to our competitors, we're giving away a maximum of \$10,000 in prize money to some of the best ski resorts in Utah and Nevada.

### Five conditions to be able to place an educational ski trip to Utah or Nevada:

1. Go to [flyonline.com.au/ski](http://flyonline.com.au/ski)
2. Register as a new agent
3. Complete the training module
4. Achieve a minimum score of 85%

### Ski Schedule 2016/17

From	To	Frequency	Flight	Semi-daily Arrives
Melbourne	Nevada City	Daily	11:25am	9:55am
Sydney	Nevada City	Daily	11:30am	9:55am
Melbourne	Salt Lake City (SLC)	Daily	11:25am	2:00pm
Sydney	Salt Lake City (SLC)	Daily	12:00pm	2:00pm



# Achievements – Media

January 1<sup>st</sup> – September 30<sup>th</sup> 2016



- LVCVA & Travel Nevada Group FAM
- Worked in Partnership with LVCVA in market team to create the inaugural group media FAM hosting M2 Magazine, New Zealand Herald, Ninemsn & Fairfax Traveller on a 6 night Nevada program in May

- **Media Analysis**
- Total gross impressions: 80 146 088
- Total U.S. Earned Media Value: \$1 853 540



- **Greg Grainger Production**
- Hosted Greg Grainger and his production crew from Australia in June of 2016 on a Nevada Rural Road Trip.
- Created 30 minute episode that has since aired on Prime & Channel 7 Networks



**The New Zealand Herald**  
A neon Stonehenge in the Nevada desert

The article features a photograph of a neon Stonehenge structure in the Nevada desert, with several people standing nearby. The text describes the unique attraction and its location in the Mojave Desert.

# Achievements – Media

January 1<sup>st</sup> – September 30<sup>th</sup> 2016



# Achievements – Media

January 1<sup>st</sup> – September 30<sup>th</sup> 2016.



# Achievements – Media

January 1<sup>st</sup> – September 30<sup>th</sup> 2016



**WITNESS LEVIN'S REMAINS SHIP'S WIFELIKE CALISE TOWNYLAND PARADISE**

WITNESS Nevada and most people think of the casinos of Las Vegas. But just past the bright, shining lights of the City is one of the most unique and beautiful landscapes in North America.

From the mountains, to the valley of the sea and the high and open desert of the Nevada desert, there are many beautiful places to visit. The Nevada desert is a beautiful and unique landscape. It's a beautiful and unique landscape. It's a beautiful and unique landscape.

**Nevada, USA: Where to find real cowboys**

By [Author Name]

The old-timey look makes sense. After all, it's not just the cowboy hats and boots that make Nevada a cowboy state. It's the cowboy spirit that makes Nevada a cowboy state. It's the cowboy spirit that makes Nevada a cowboy state.

**Most Popular Articles**

- 1. The Nevada desert is a beautiful and unique landscape.
- 2. The Nevada desert is a beautiful and unique landscape.
- 3. The Nevada desert is a beautiful and unique landscape.

**Daily Telegraph**

**See the real-life places in Las Vegas where The Hangover and other movies were filmed**

By [Author Name]

**DRIVING** down the main street in Las Vegas on a Saturday night, the bright lights and big signs flash by.

It's easy to see why Las Vegas is a popular destination for tourists. The city is full of excitement and entertainment. It's a beautiful and unique landscape. It's a beautiful and unique landscape.



# Achievements – Media

January 1<sup>st</sup> – September 30<sup>th</sup> 2016



**Las Vegas reinvents itself with golf, graffiti and downtown dining**

**UPGRADE NOW**  
in gifts and cashback. TSCC apply.

**SAMSUNG**

Get the latest Samsung products and services. Upgrade your Samsung products and services. Upgrade your Samsung products and services.

**DRIVING WITH THE STARS: BEST CELEBRITY CHEF RESTAURANTS IN LAS VEGAS**

**DRIVING** More than 25 million visitors have visited Las Vegas in the past year, and not just for the gambling, the shows, the vibrant nightlife and the world-class entertainment.

This exciting city is home to some of the best celebrity chef restaurants in Las Vegas. It's a beautiful and unique landscape. It's a beautiful and unique landscape.

**Asia resort and casino, Las Vegas review: Classy and modern**

**COMPARE FLIGHT PRICES**

**Most Popular Articles**

- 1. The Nevada desert is a beautiful and unique landscape.
- 2. The Nevada desert is a beautiful and unique landscape.
- 3. The Nevada desert is a beautiful and unique landscape.



# Achievements – Media

January 1<sup>st</sup> – September 30<sup>th</sup> 2016



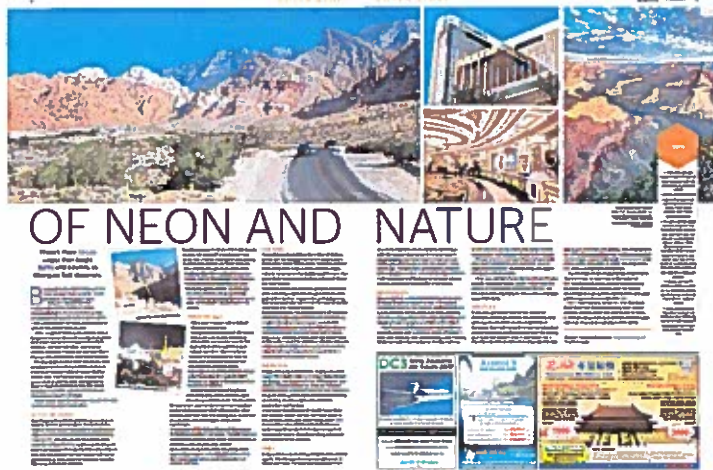
# Achievements – Media

January 1<sup>st</sup> – September 30<sup>th</sup> 2016



# Achievements – Media

January 1<sup>st</sup> – September 30<sup>th</sup> 2016



## NEVADA NEVER LOOKED SO GOOD

### HOT OFF THE HEELS FROM HOSTING JASON BOURNE, AUSSIES FLOCK TO NEVADA TO ADD STAR QUALITY TO THEIR HOLIDAYS.

It's impossible to visit Nevada without taking in a Carson City 500 show, but what is the #1 you're in Aus? Being in the States just means a short section of our year.



Nevada from the Carson 500 at M & L, Nevada Photo by Cora H. Nevada/The Photo Post

That's not all, as the Nevada State did the work to improve the up and up the state's most popular and most popular show. First, the state's first Nevada to Australia. Nevada in conjunction with Las Vegas Convention and Visitors Authority, City of Las Vegas, Carson's Entertainment and Co. Tahoe North. It means the first of the Governor in with the Governor in with the Governor, with Governor Lumbard joining the group.



# Achievements – Social

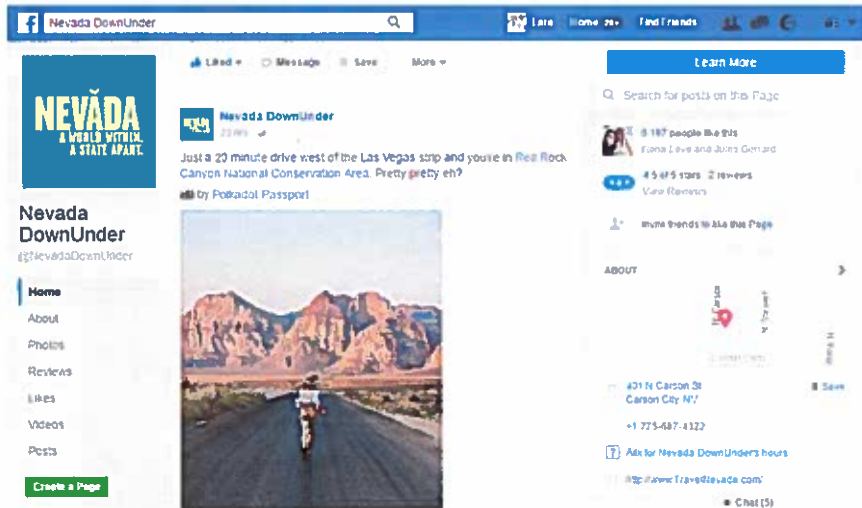
January 1<sup>st</sup> – September 30<sup>th</sup> 2016



## Nevada DownUnder

- Grew Nevada DownUnder fan base from 0 – 6197 (at 19 Sep)
- Total reach FY 16/17 149K

**Fans by Gender, Age, Country, City.**  
Fans are predominantly from Australia (79%), with Melbourne the strongest market (611) closely followed by Auckland NZ (409). Women are increasingly more likely to be Page Fans (61%), with age category highest in the 35-44 year old bracket.



# Achievements

January 1<sup>st</sup> – September 30<sup>th</sup> 2016

## Nevada Downunder

The Nevada DU Page Like Ad Set currently running is comprised of Australian Men and Women aged 18-64, with interests in line with Nevada region related keywords. Mobile placements are by far the most commonly viewed and liked.

As spend is extended over a longer period through to the end of this year, we will continue to see our Facebook connections grow and should see our cost per Like decrease.



Suggested Page



Like our Page for inspiration and advice for Aussies ready to explore Nevada.



Nevada DownUnder  
Government organisation  
8,067 people like this.

Suggested Page



Like our Page for inspiration and advice for Aussies ready to explore Nevada.



Nevada DownUnder  
Government organisation  
8,067 people like this.

Suggested Page



Like our Page for inspiration and advice for Aussies ready to explore Nevada.



Nevada DownUnder  
Government organisation  
8,067 people like this.



# Achievements – Governors Visit & Travel Nevada's Australia Sales Mission 2016

Receptions with Cirque du Soleil, LVCVA & United Airlines

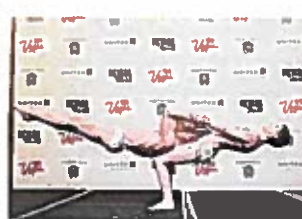
- Melbourne – 130 guests
- Sydney – 170 guests

Product development / training meetings

- Helloworld / Qantas Holidays, Webjet, Intrepid, APT, Adventure Destinations, Excite Holidays, Flight Centre, Adventure World



CIRQUE DU SOLEIL



Flight Centre Expo in Brisbane





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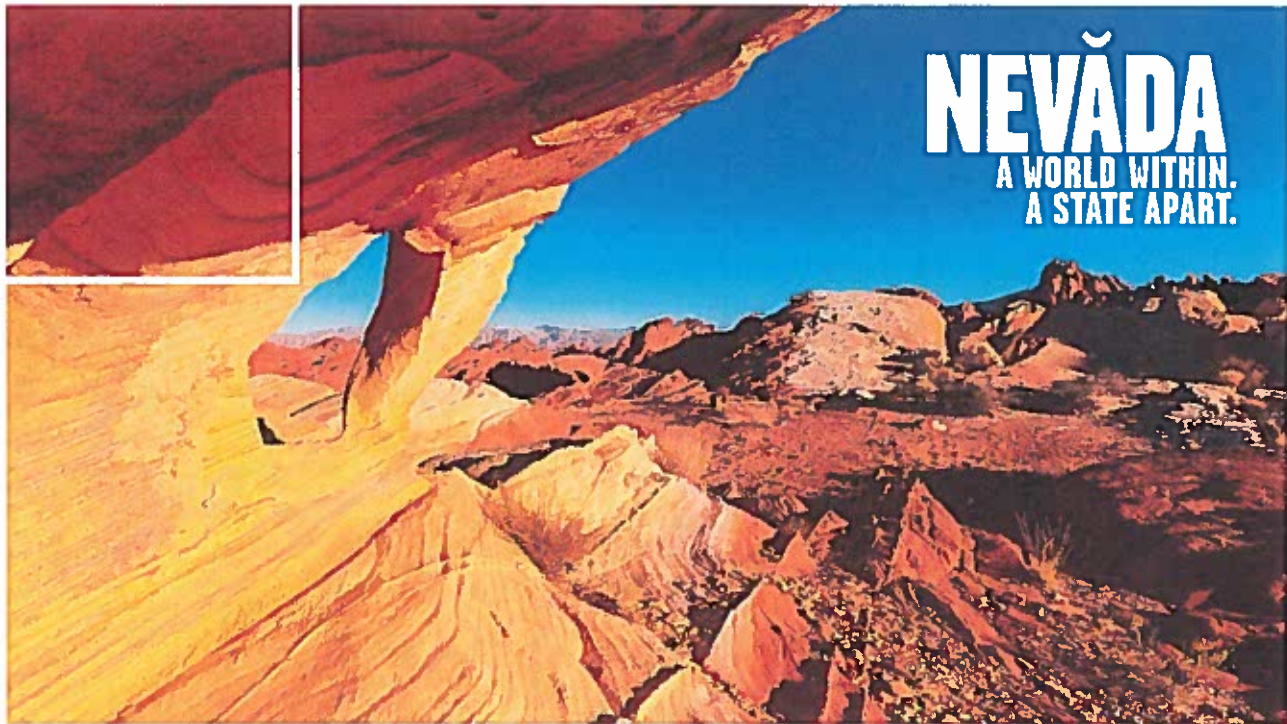
Thank you

Sources: We thank ravel Market Insights and Roy Morgan Research for their market update data



Canuckiwi Ltd. 41C Clyde Road, Browns Bay, North Shore, Auckland, New Zealand,  
+ 64 21 555 463 (Mobile) + 64 9 280 4579 (Office)





# NEVADA

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## OFFICIAL + INFORMATION

**Official Name:** Federative Republic of Brazil

**Government System:** Federal Presidential Republic

**President:** Michel Temer

*(President Dilma Rousseff is away, awaiting the final process of her impeachment judgment)*

**Capital:** Brasilia

**Language:** Portuguese

**Location:** South America

**Area:** 8.516 million km<sup>2</sup> – 3.288 million mi<sup>2</sup>

**Population:** 205,867,645

**Cities:** 5,570

**Division:** Brazil is divided into five regions with 26 states plus the Federal District

**Major Cities:** São Paulo, Rio de Janeiro, Porto Alegre, Belo Horizonte, Fortaleza, Recife, Salvador, Curitiba, Florianópolis, Manaus and Brasilia

**Official Time Zone:** GMT-3 (GMT-2 daylight saving time)

**Internet Terminology:** .br

**International Dialing Code:** +55

**Life Expectancy:** 75.2 years

**Official Website:** [www.brasil.gov.br](http://www.brasil.gov.br) and [www.turismo.gov.br](http://www.turismo.gov.br) (for Tourism)



## ECONOMIC PANORAMA



- Population of **205 million**
- **50 Million Consumers**
- **Great Opportunity** to invest in this large market, with a very high growth potential
- Number of Brazilian millionaires **168,000**
- Several Institutes are working independently **against corruption**
- With a new government in place, consumer **confidence is rising again**
- **Brazil will get back** on track gradually (2018 and 2019)
- **9<sup>th</sup> Global Economy** (Largest Economy in Latin America)



Brazil's GDP was  
**US\$ 1.8 TRILLION** in 2015

MEXICO	US\$ 1.14 TRILLION
ARGENTINA	US\$ 585 TRILLION
COLOMBIA	US\$ 289 TRILLION
CHILE	US\$ 240 TRILLION
VENEZUELA	US\$ 239 TRILLION

- Brazil's GDP sums up to **50% of all of South America's GDP**
- Brazil's GDP is **3 times larger than** Argentina's and **more than 6 times larger than** Colombia's or Chile's
- According to WTTC, **Brazil is the 10th Global Tourist Economy**, with **US\$ 56.3 Billion** in contribution to the country's GDP
- Brazil is the **7<sup>th</sup> largest market in automobiles on the road**, behind China, USA, Japan, Germany, India and United Kingdom.

**"IF YOU WANT TO BE RELEVANT IN THE GLOBAL ECONOMY, YOU HAVE TO BE IN BRAZIL"** RICARDO AMORIM, BRAZILIAN ECONOMIST



## Latin America Countries - INFO

GDP GROWTH  
**3.5%**

INFLATION  
**8.2%**

UNEMPLOYMENT RATE  
**11%**

INTEREST RATE  
**14%**

EXCHANGE RATE APPROX ±  
**4%**  
TO US\$ 1

	Q1 2015 (IN US\$ BILIONS)	1 Q1 2014	ANNA BLS (IN US\$ BILIONS)
<b>BRASIL</b>	<b>1.772.589</b>	<b>205.867.845</b>	<b>6.3</b>
MEXICO	585.623	121.005.815	29.3
COLOMBIA	293.243	46.336.300	5.9
CHILE	240.222	18.006.407	3.7
VENEZUELA	239.572	30.620.404	0.9
PERU	192.141	31.151.643	3.2
ECUADOR	95.828	16.027.500	1.6
CUBA	80.656	11.406.554	0.5
DOMINICAN REP	67.492	10.528.000	5.1
GUATEMALA	63.911	16.178.133	1.5
URUGUAY	53.794	3.415.866	2.7
COSTA RICA	52.898	4.773.130	2.5
PANAMA	52.132	3.764.168	1.7
BOLIVIA	33.21	11.410.651	0.8
PARAGUAY	28.077	7.003.408	0.6
EL SALVADOR	25.766	6.401.240	1.3
HONDURAS	20.295	8.725.111	0.9
NICARAGUA	12.222	6.198.154	1.3
HAITI	8.818	10.911.819	0.5
SURINAME	5.192	534.189	0.3
GUINIA	3.164	748.900	0.2
BELIZE	1.763	388.310	0.3

\* International Inbound Tourists

## Expenditures in International Travel

1<sup>st</sup> Quarter 2016:

**US\$ 3 Billion** (R\$ 11.4 billion)

Expenditures in International Travel 2015:

**US\$ 17.36 billion** (R\$ 57.8 billion)

Expenditures in International Travel 2014:

**US\$ 25.57 billion** (R\$ 59.4 billion)

Expenditures in International to the US 2014:

**US\$ 12 billion** (R\$ 28 billion)



## Brazilians in the US

2010: 1.2 MILLION | (+34%)

2011: 1.5 MILLION | (+26%)

2012: 1.8 MILLION | (+19%)

2013: 2 MILLION | (+15%)

2014: 2.2 MILLION | (+10%)

2015: 1.1 MILLION\* | (+5.3%)

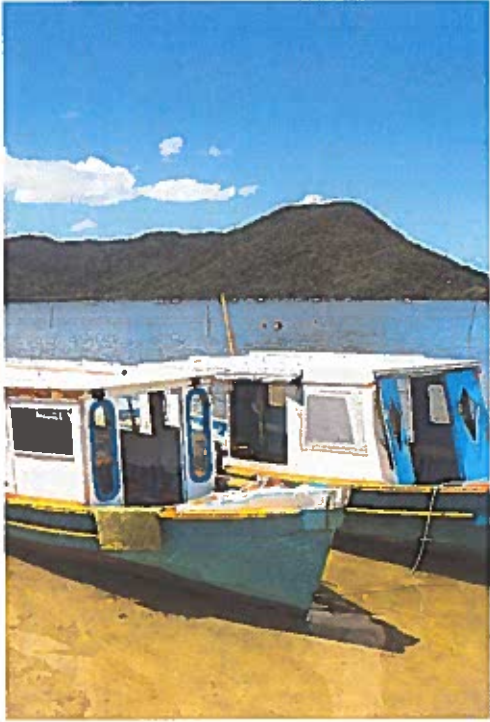
\* The growth rate was the same in the second semester. We can expect that 2.2 million Brazilians visited the US last year.

## EXCHANGE RATE

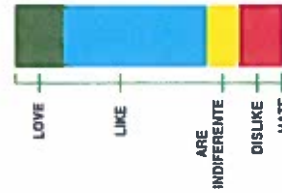
2014: US\$ 2.34

2015: US\$ 3.33

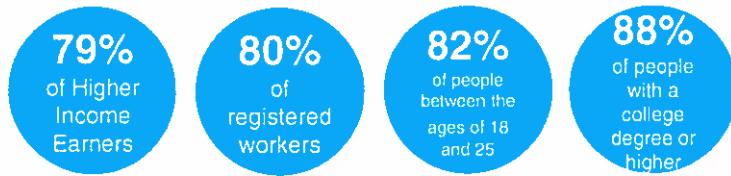
2016: US\$ 3.80



**7 out of 10 Brazilians** say they **like to travel**.  
This percentage is even greater among registered workers



% THAT LIKES TO TRAVEL...

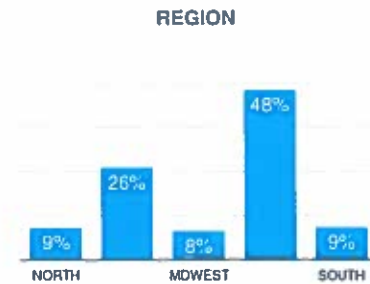
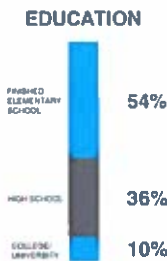


Source: Datapopular/PANROTAS Forum

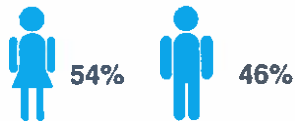
## OPPORTUNITIES AND TRENDS

Recent **research by Datapopular** shows that only **30% of Brazilians** used a **travel agency** or an **OTA** to purchase their travel. Among them **74% gave an "A"** to the travel agencies services against **62% for the OTAs**. Among regular or bad reviews, the OTAs have higher percentages than the traditional travel agencies.

**30 million** Brazilians who never traveled say they want to travel soon. **Who they are:**



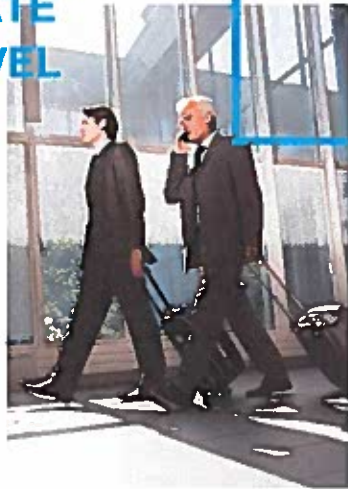
### GENDER



### CLASS



## CORPORATE + TRAVEL



Corporate travel accounts for US\$ 11.6 billion of Brazil's economy and from 60% to 70% of domestic air tickets. In 2014, this number was US\$ 12 billion. Data from Alagev, the main corporate travel managers association. TMCs under the Abracorp umbrella (another corporate travel association) sold US\$ 3.5 billion in 2015 (-2.6%)



Even with the downturn in some sectors of the Brazilian economy, the country still offers good business opportunities in specific areas. The country's hosted the Summer Olympics (August, in Rio de Janeiro) – it has generated interest from tourists and business people of different countries to Brazil.

In terms of consumption, certain industries are still heated in Brazil. Mobile phones sales remains high throughout the country, with 257.8 million devices in use in late 2015.

The number of Internet users in Brazil has reached more than half the country's population. In 2015, Internet users totaled 55% of citizens over 10 years of age, or 95.4 million people.

## MAIN + PLAYERS

### TRAVEL AGENCIES

There are more than 11,000 travel agencies in Brazil. Free lancers and home based agencies are also growing, and they issue their tickets with consolidators, OTAs or tour operators. Abav is the main association of travel agencies, with 3,200 members.



### CORPORATE TRAVEL AGENCIES | TRAVEL MANAGEMENT COMPANIES

They account for 60% to 70% of all domestic air tickets sales in Brazil. They also dedicate some portion of sales for leisure travel, especially for their accounts. Leading companies include Alatur JTb, BCD Travel, Carlson Wagonlit, Copastur, Flytour Amex, Kontik, Maringa and Tour House, among others. The main association is Abracorp.

### OTAS

Decolar.com (who received an investment from Expedia), Hotel Urbano (received investment from Priceline Group), Viajanel and Submarino Viagens (part of CVC Group) are the main players. Expedia.com, Hotels.com, Booking.com, Trivago and Egencia are also in Brazil. For the travel industry (travel agencies and tour operators), Trend and Hoteldo are among players who have invested a great deal in new tools.



### TRAVEL MANAGERS

Alagev and TMG are the main associations for travel managers (or travel service buyers) from big companies established in Brazil.



#### TOUR OPERATORS

CVC is the largest tour operator in Brazil, accounting for more than 4 million passengers and US\$ 1.56 billion in sales (20% through other travel agencies, and 80% through its 1,000 stores and website). Still, the Brazilian market has space for other traditional tour operators (such as Agatur, New Age, RCA, Schultz, Trend, Trade Tours and Visual), some linked to important travel companies (such as Latam Travel, former Tam Viagens, Flytour Viagens, Azul Viagens, 55 Destinos/Alatur JTB Group and Orinter Tour & Travel), or focused on niches (CI, Primetour, Teresa Perez Tours). Braztoa is the main association.



#### CONSOLIDATORS

Mainly, they offer credit for travel agencies who cannot book directly with airlines. Biggest players are Rextur Advance (part of CVC Group); Flytour Gapnet (merger between two groups, that also have a TMC, two tour operators and chain of travel agencies, among other companies); Esferatur (also owns Orinter Tour & Travel); and Ancoradouro (operating mainly in the interior of Sao Paulo). Other players include High Light (strong in Rio de Janeiro), Confiança (North and Central Brazil), Skyteam (South of Brazil), BRT (South), TC World/CNT (alliance with Trend) and Sakuratur (Asia market). Air tickets make up 90% of their sales, but consolidators are investing in car rental and hotels, in addition to travel insurance (always for the travel agent).



## AIRLINE + MARKET

We estimate that the sales of international AIR TICKETS in Brazil in 2015 reached US\$ 4.54 billion. In 2014 the amount was US\$ 5.8 billion

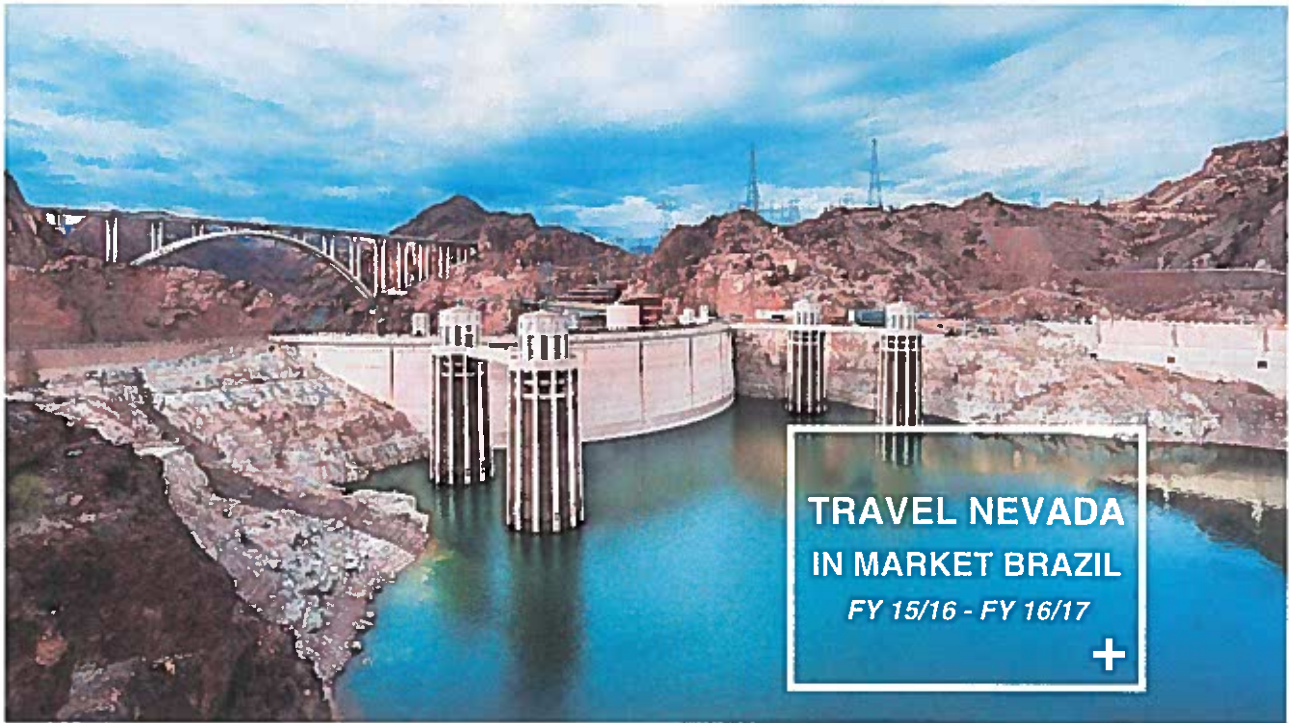
**GOOD NEWS FOR 2016:** The number of international ticket sales is still down (-8%), but the RATES ARE LOWER THAN IN 2015 (-20%). IF TOTALING SALES IN DOLLARS, SALES ARE DOWN BY 25% but the airlines compensate this loss with the higher exchange rate for the real. Average tickets prices fell 25% in 2015 (in dollars).

São Paulo accounts for 60% TO 70% OF ALL INTERNATIONAL AIRLINE TICKETS SOLD in Brazil. Followed by: Rio de Janeiro, Rio Grande do Sul, Minas Gerais, Parana, Santa Catarina, Mato Grosso, Brasília, Pernambuco, Goias

96.2 million airline trips were taken in 2015 inside Brazil (domestic)

Brazilian airlines account for 30% of all INTERNATIONAL PASSENGER AIR TRANSPORTATION FROM/TO BRAZIL

Only 30% of all 205 million Brazilians have ever traveled by plane



## CHALLENGES +

The economic crisis that Brazil is going through and the dollar's instability affected the tourism sector. According to a survey conducted by Ipeturis (Institute of Research, Studies and Training in Tourism) for Sindetur-SP (Association of Tourism Companies in the State of São Paulo), 82.1% of companies in the tourist agency had declining sales in 2015.

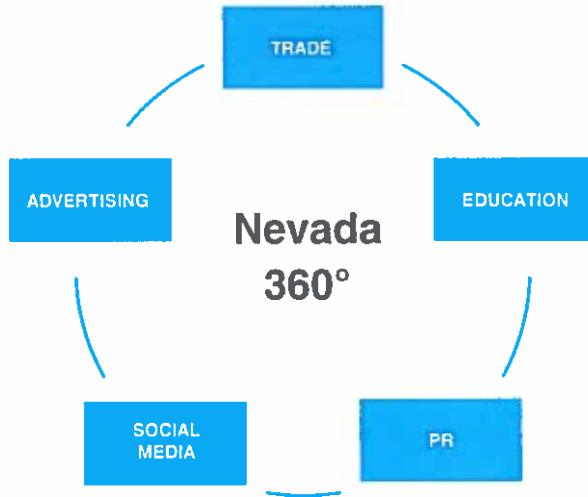
According to Ilya Michael Hirsch, president of Sindetur-SP, tourist agency industry sales to individuals were the most affected by the effects of the Brazilian economic crisis with a negative variation of 39.8%, while for the corporate private sector the sales decline had average growth -25.7%.

Competitive destinations continue to fight for market share: 2015 was a year where destinations invested a lot in the Brazilian market. California, Georgia, New York and Arizona States invested heavily in final consumer actions around the country. Destinations such as Texas and Orlando invested on media and coop campaigns together with key tour operators.





Travel Nevada  
**INTEGRATED PLAN**  
in market Brazil





# TRADE + STRATEGY



## WHAT +

- Promote Nevada to the trade
- Generate and Increase interest
- Brand awareness
- Visibility
- Product Development
- Sales

## HOW +

- Creating strong relationships with the industry
- Maintaining these relationships
- Sales Calls
- Work meetings
- Creating partnerships
- Being present in the main industry events

# TRADE + SHOWS

- **Objective** – to promote Nevada to the trade, increasing interest, brand awareness and sales.
- **Activity** – Promote Nevada and all its cities and attractions, find synergy with potential partners, meet, strengthen relationships and develop business opportunities with key tour operators, airlines, hotels and attractions partners.
- **Results** – Training and events planning, product development, new leads and partners, opportunities for fam trips and trade marketing.
- **Numbers** – Since Jan 2016 Travel Nevada has been present in 4 Trade Shows.



Visit **USA** 2016

## MISSION + WTM - MARCH 29 - 31, 2016

- **Objective** – Maintain, strengthen and create relationships with key tour operators and Airline partners.
- **Activity** – Promote Nevada and create business opportunities by attending WTM Latin America with presence in the Brand USA Pavilion. Nevada VIPs presence in Brazil.
- **Results** – Throughout WTM, we had the opportunity to make new qualified contacts with many partners. Initiate business development conversations and seek opportunities of activities with the industry. At Nevada booth, we had the presence of several partners.



## + VISIT USA - APRIL 4-8, 2016 *SÃO PAULO, CAMPINAS AND RIO DE JANEIRO*

- **Objective** – Maintain, strengthen and create relationships with key tour operators and Airline partners
- **Activity** – Promote Nevada and create business opportunities by attending Visit USA event in Sao Paulo, Rio de Janeiro and Campinas
- **Results** – New qualified contacts, new business opportunities with partners. Strengthen the presence of Nevada in the Brazilian market.



## CLIENT + EVENTS

- **Objective** – to promote Nevada to the trade and depending on the event final consumer, increasing interest, brand awareness and sales.
- **Activity** – Promote Nevada and all its cities and attractions, strengthen relationships and develop business with new agencies and the clients' sales force.
- **Results** – Sales force education, new leads (agents), final consumer brand visibility.
- **Numbers** – Since Jan 2016 Travel Nevada has been present in Client Events.



## ENCONTRO ANCORADOURO + APRIL 2016

- **Objective** – Maintain and strengthen relationship with Ancoradouro operator and its clients.
- **Activity** – Promote Nevada and create business opportunities by attending Ancoradouro and promoting brand visibility and training during the event.
- **Results** – New qualified contacts, new business opportunities, sales force education, new leads (agents). Strengthen the presence of Nevada in the Brazilian market.



## ENCONTRO DE VENDAS (SALES EVENT)

**+ FLYTOUR GAPNET  
AUGUST 30 - 31, 2016**

- **Objective** – Maintain and strengthen relationship with Flytour Gapnet operator and its clients.
- **Activity** – Promote Nevada and its tour packages, and create business opportunities by attending the sales event and promoting brand visibility and training during the event.
- **Results** – New qualified contacts, new business opportunities, sales force education, new leads (agents). Strengthen the presence of Nevada in the Brazilian market.



## SALES CALLS + TRADE

- **Objective** – Introduce ourselves as Nevada, approaching Key Accounts, Airlines, and large agencies and wholesalers to discuss action plans to promote Nevada in 2017.
- **Activity** – we made 84 sales calls with key partners, Operators and large Travel agencies.
- **Results** – All partners have updated us on the market climate and they are all fully up to speed with developments within the destination and Nevada's marketing strategy, we have built packages with major operators and helped the agents with tools on how to sell and recommendations on visibility on website and stores for collateral.

### Numbers of Sales Calls

Month	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	TOTAL
Agencies	15	11	15	6	19	10	2	15	93



**SALES CALLS**  
**+ TRADE**



# EDUCATION + STRATEGY



## WHAT +

- Promote Nevada to the trade
- Increase interest
- Generate and Increase interest
- Brand Awareness
- Visibility
- Provide Sales Tools to agents
- Sales

## HOW +

- Promoting trainings for agents
- Partner up with attractions, services or synergic destinations to enrich the trainings
- Promote a fun environment with a high energy speaker at the trainings
- Promote fam trips for professionals to have a high end experience at the destination
- Provide professionals with regular content about the destination attractions, news, curiosities
- Collateral Distribution

# EDUCATIONAL SEMINARS + TRADE

- **Objective** - Maximize our educational opportunities to the trade by using our key Accounts as vehicles and showing all Nevada has to offer.
- **Activity** – We have hosted 10 face to face educational seminars throughout the Brazil, training up to 1,996 travel agents.
- **Results** – Conduct Nevada’s signature educational events in the main markets of Sao Paulo, Campinas, Rio de Janeiro, Belo Horizonte, Ribeirão Preto and measure success of learning through surveys



Numbers of trained tourism professionals

Month	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	TOTAL
Trained Agents	68	-	-	1635	-	26	133	134	1996



## EDUCATIONAL SEMINARS + TRADE



## SUPPORTED + FAMS

- **Objective** – Educate new and potential operators and the best travel trade that already sell Nevada to have the best product experience within the destination
- **Activity** – We have promoted the Nevada Winter Fam and the Brand USA Fam, offered to the participants more detailed information and clarification about the cities and attractions, many had no knowledge. The strong point of these trips is that most participants didn't know the destination, which has made a more productive, exciting and satisfying journey.
- **Results** – The trip was viewed as an overall success by agents & Airlines. We had many positive feedback from the participants and operators, to have had this unique opportunity, which, conducted in person and with a specialist professional providing valuable information will make them able to increase the number of sales to the destination Nevada. We had also spontaneous media in the specialized vehicles.

### Guests

#### Winter Fam – March 16

- AIT - Mrs Karia Haimenis
- CVC - Mr Adriano Santa Ana
- FlyTour - TBI
- Interpoint - Mr Marco Fabio Levy
- MK Travel - Mrs Olga Vianna
- MMT Gapnet - Mrs Vilmaria Souza
- Orinter - Mr Roberto Sanches
- Trend - Mr Emmanuel Labastida
- Abreu Tur - Mr Ronnie Correa

#### Leader:

Travel Nevada - Jason Schulke, diretor do Travel Nevada no Brasil.

#### Brand USA Fam – August 16

- Nova Operadora - André Luiz Sales Pereira
- Flytour Eventos - Amanda Bernardo
- Terasa Perez - Bruno Ferreira
- Agaxtur - Paulo Biondo
- RCA Turismo - Vanessa Braga

#### Leaders:

Brand USA - Ana Elisa Facchinatono Brasil

Travel Nevada - Jason Schulke, diretor do Travel Nevada no Brasil.

**WINTER FAM**  
**+ MARCH 2016**



**BRAND USA FAM**  
**+ AUGUST 2016**







## E - NEWSLETTERS

Since January more than 10 newsletters were sent to our mailing of approximately 18,000 recipients: operators and travel agents



## COLATERAL + DISTRIBUTION

- **Objective** – Distribute collateral to trade partners for the benefit of educating them on the destination and distribution to final consumer
- **Activity** – Distribution during events, sales calls and trainings
- **Results** – Ensured education on the destination across trade and consumer





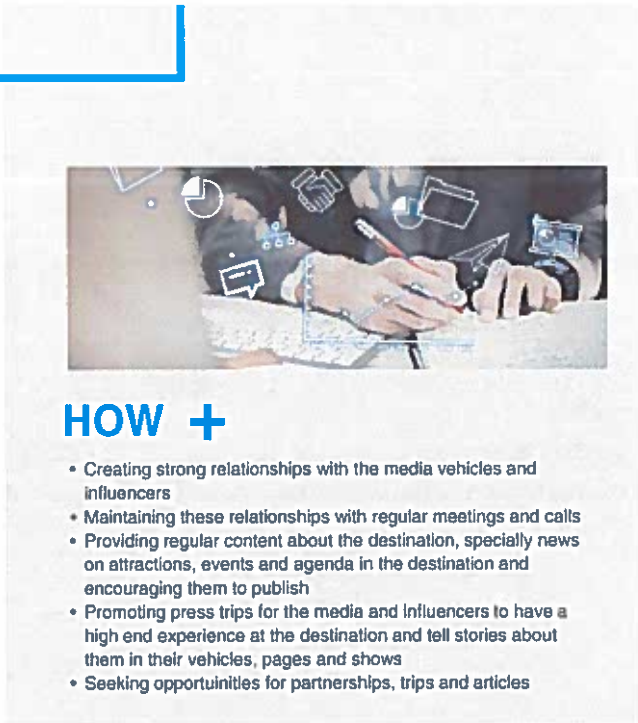
**PUBLIC  
RELATIONS  
+**

# PUBLIC RELATIONS + STRATEGY



## WHAT +

- Promote Nevada to the main stakeholders: media and final consumer
- Generate desire and interest towards the destination
- Brand Awareness
- Visibility



## HOW +

- Creating strong relationships with the media vehicles and influencers
- Maintaining these relationships with regular meetings and calls
- Providing regular content about the destination, specially news on attractions, events and agenda in the destination and encouraging them to publish
- Promoting press trips for the media and influencers to have a high end experience at the destination and tell stories about them in their vehicles, pages and shows
- Seeking opportunities for partnerships, trips and articles

# RELATIONSHIP WITH THE MEDIA + & PRESS RELEASES

Since January, Wolf met more than 35 vehicles to talk about Nevada and all it can offer. More than 8 press releases were sent to our mailing of approximately 3,000 recipients: trade and final consumer media vehicles, bloggers, influencers and celebrities.

The results below show only the Media Value of the Spontaneous Media generated by Brazil's office efforts, they do not show the general news about Nevada and or only Las Vegas, only if they were released by us.

Month	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	TOTAL
Media Value in USD	-	-	\$ 7.402,00	\$ 100,00	\$ 1.111.130,00	\$ 3.000,00	\$ 170.557,21	\$ 411.157,88	\$ 1.773.247,14



# PRESS & INFLUENCES EVENT + TRAVEL NEVADA EVENING

August 2nd - Travel Nevada Evening at Cios Restaurante

35 attendees – including the main vehicles in Brazil and in the tourism media: Folha de S. Paulo, Viagem & Turismo, Viajar pelo mundo, Brasiluris, Mercado & Eventos, Tv Record, R7, Grupo Travel News Viaje Mais, Top Destinos, TurismoEtc and many others vehicles.

Great partnerships and opportunities were open with the media outlets, they replied us that were very impressed with the variety of attractions in Nevada and are very open to content and invitations. <https://www.facebook.com/travelnevadabrasil/posts/1014418225341096>  
After the event we could see an increase in Spontaneous Media in the vehicles, showing how important is to promote this kind of event to the Media.

Publications about the event:

Trade: 2 articles | Final Consumer Magazines/Blogs: 5 | Total AdValue: \$75.578.73



# PRESS & INFLUENCES EVENT + TRAVEL NEVADA EVENING



# PRESS TRIP + WINTER FAM MARCH 2016

In order to strenghten relations with the media, increase the visibility of the destination to both trade and final consumer media we invited 2 media vehicles to the Winter Fam, taking advantage of the structure of the fam.

**Vehicles:**

Trade: Panrotas

Final Consumer: Viajar Pelo Mundo

**Media Results:**

Trade Panrotas: 1 web article

Total AdValue: \$2,000.00

Final Consumer Magazines Viajar Pelo Mundo: 6 pages with Cover Call

Total AdValue: \$145,151.10





## SOCIAL MEDIA + STRATEGY



### WHAT +

- Promote Nevada to the final consumer
- Generate final consumer engagement and interaction with the brand
- Brand Awareness
- Visibility
- Generate leads



### HOW +

- Providing interesting digital content on social media pages
- Quickly responding to public interactions
- Encouraging public to interact with the pages



# FACEBOOK

## Travel Nevada Brasil



# ADVERTISING + STRATEGY



## WHAT +

- Promote Nevada to the final consumer
- Brand Awareness
- Visibility



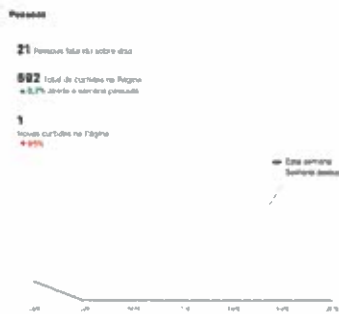
## HOW +

- Creating interesting advertising pieces
1. Advertise in Social media
  2. Creating special publications with media vehicles -> Ads (in Development)



## ADVERTISING DIGITAL

The initial strategy for Advertising is digital via Facebook with low little investment to create a base, from that we will have several media plan options to boost our sales.

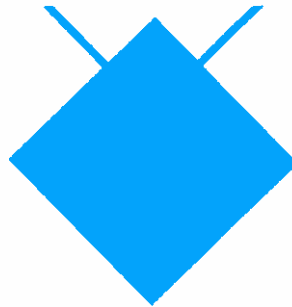




## KPIS

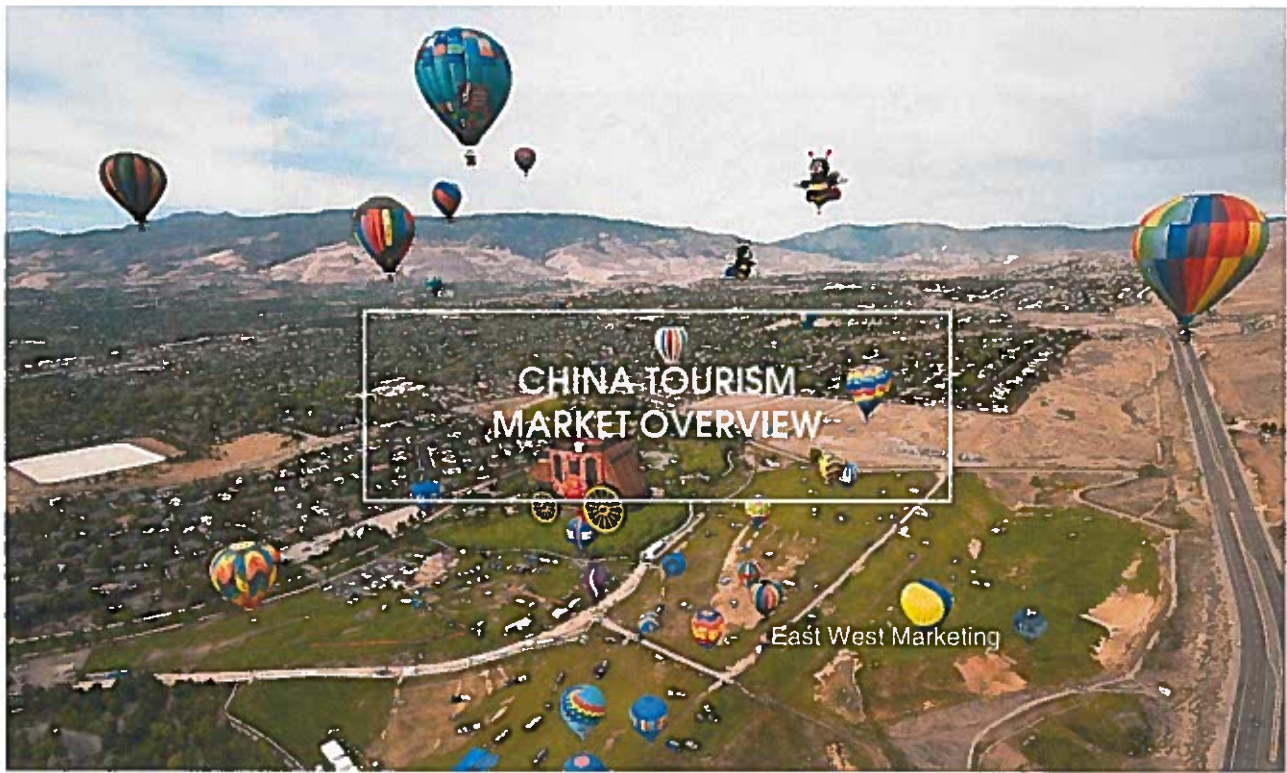
KPI	TOTAL ACTIVITIES GOALS	TOTAL ACTIVITIES ACTUAL	
	FY16 (15/16)	FY16 (15/16)	
Tradeshows	2	4	✓
Missions	1	1	
Client Events	8	11	✓
Trained Agents	1500	1728	✓
Sales Calls	50	76	✓
FAMS	1	1	
Media Events	1	1	
Press Trips	1	1	
Spontaneous Media	\$ 100.000,00	\$162.375,59	✓

KPI	TOTAL ACTIVITIES GOALS	TOTAL ACTIVITIES ACTUAL	
	FY17 (16/17)	FY17 (15/17)	
Tradeshows	5	0	
Missions	2	0	
Client Events	15	3	
Trained Agents	4000	267	
Sales Calls	200	17	
FAMS	2	1	
Media Events	1	0	
Press Trips	3	1	
Spontaneous Media	\$1.000.000,00	\$593.615,15	



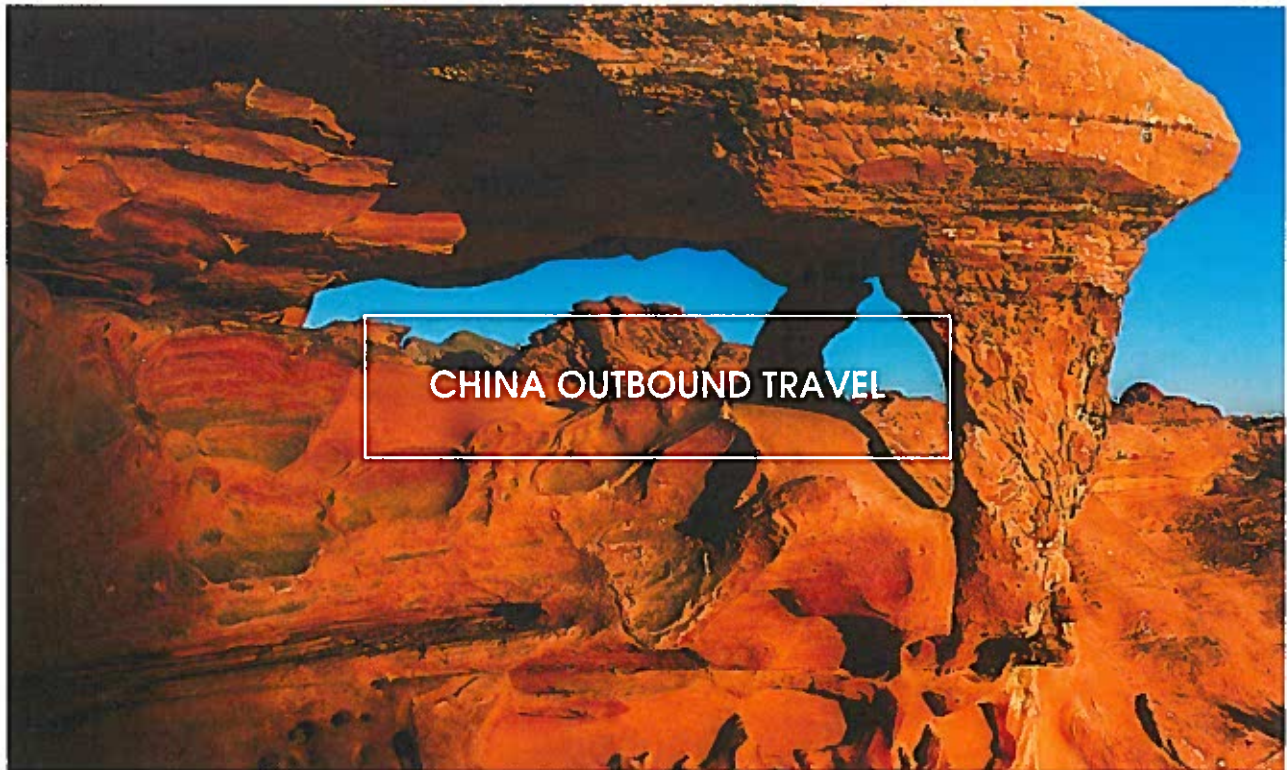
# THANK YOU





**CHINA TOURISM  
MARKET OVERVIEW**

East West Marketing

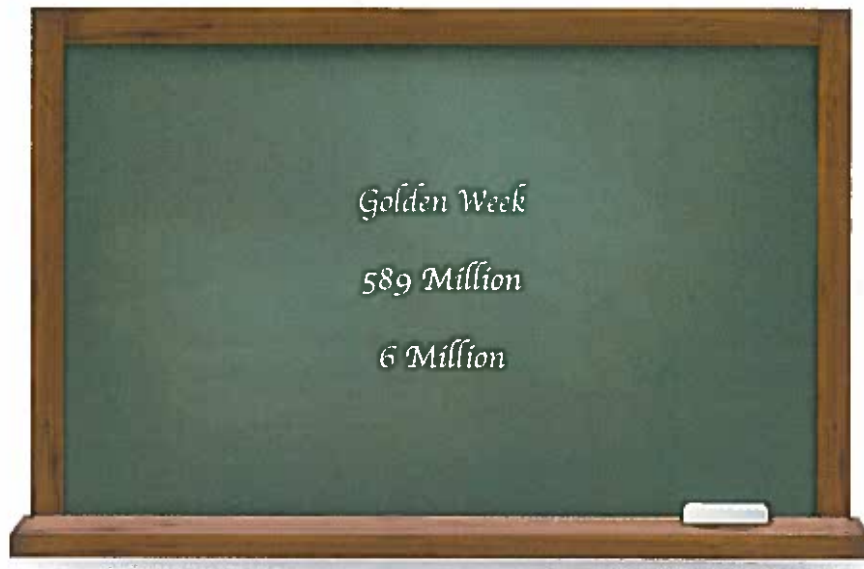


**CHINA OUTBOUND TRAVEL**

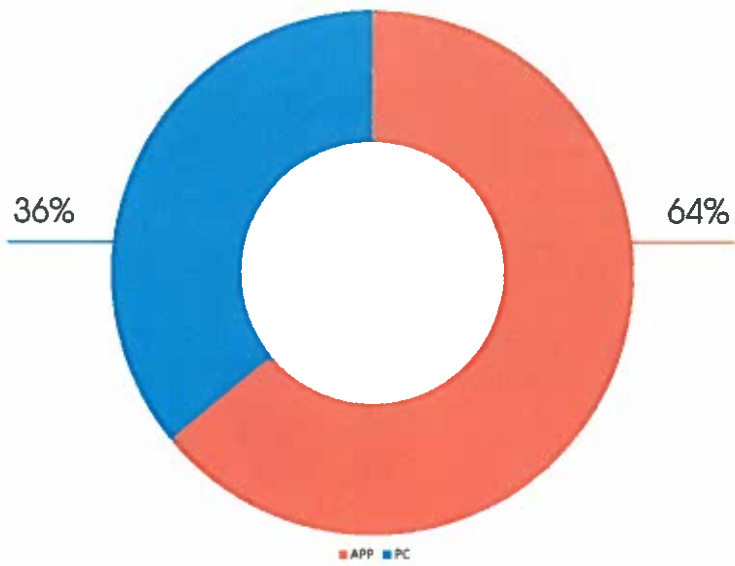


Source: Global FIT Report 2015, China Tourism Academy





Source: National Holiday Week Report 2016, China Tourism Academy



Source: Ctrip

41%

Sight seeing

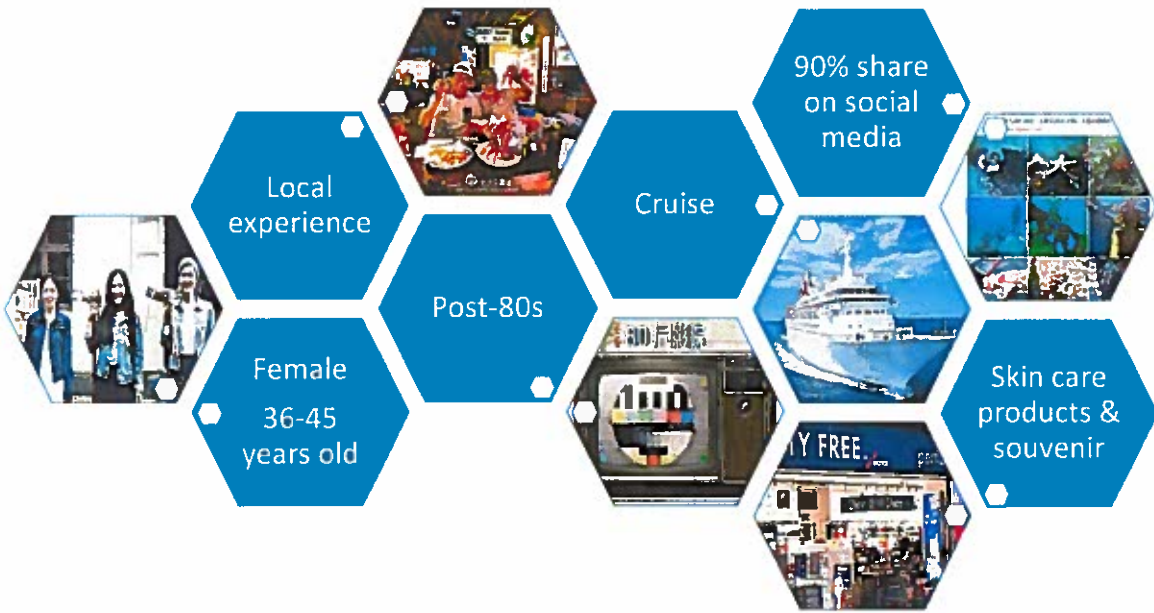
Food



59%

Shopping

Hotel





**CHINESE TRAVEL TO US**

2015

**2.56 million**

Number of Chinese traveled to US



**50%**

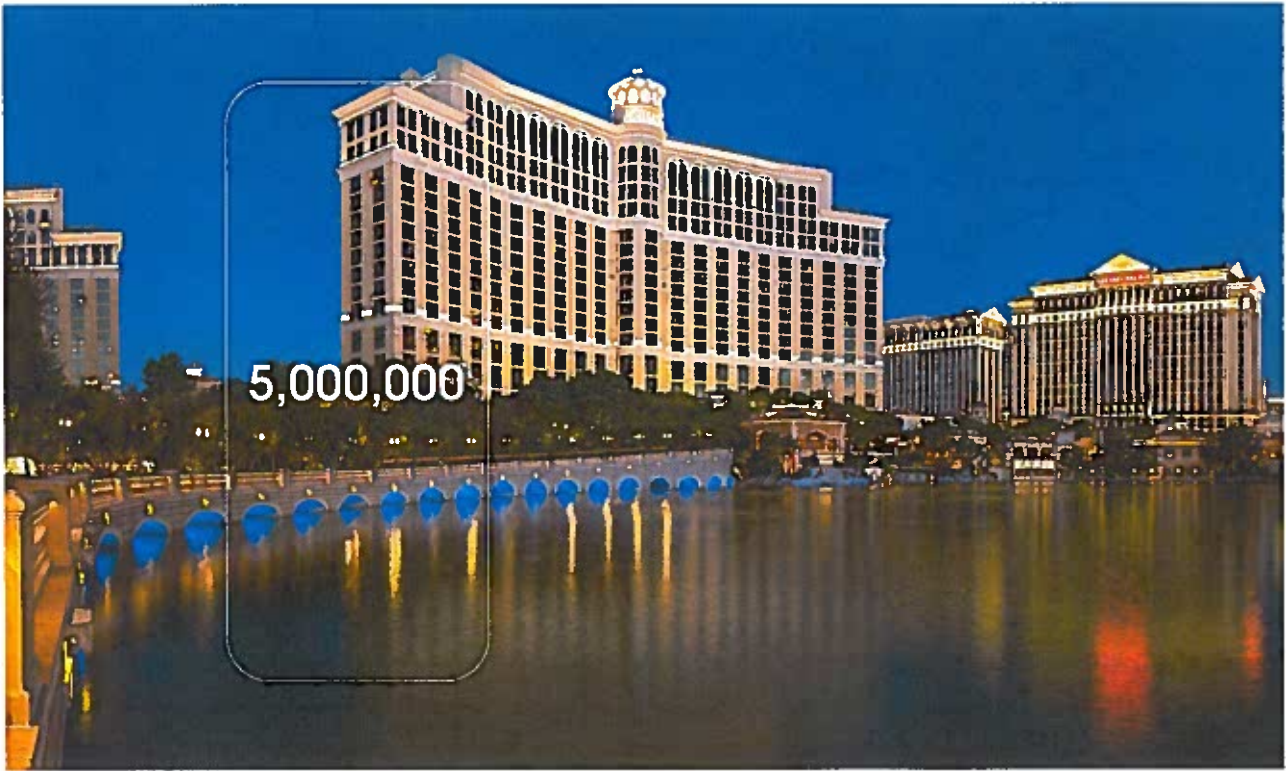
Visa application has increase over 50% since 10-year visa policy



**14 Gateway Cities**

Provide direct service from China to US





5,000,000

### Major Products in Market



Regular group travel  
 East Coast + West Coast + Hawaii  
 California + Las Vegas  
 Chicago + East Coast  
 East Coast + Florida



Students group  
 Camp  
 Homestay  
 University campus tour  
 Other cultural exchange program



FIT  
 Self-driving  
 Amusement park  
 Beach  
 Marathon  
 Ski



New trends  
 National Park

## Major Gateway Cities

Beijing
Shanghai
Guangzhou
Chengdu
Xiamen/Shenzhen
Xi'an
Hangzhou
Changsha
Xiamen
Wuhan
Nanjing
Qingdao
Hong Kong



Los Angeles
San Francisco
New York City
Chicago
Seattle
Detroit
Dallas
Houston
San Jose
Las Vegas
Washington DC
Hawaii
Boston
Las Vegas

## Major Carriers







## Online Travel Ecosystem

Now, social media has been the most important part of tourism ecosystem, and influence each segment.

**Search** for travel related content

**Cross Reference** various content sources they find

**Refer** to OTAS, travel review sites and travel content portals for travel related content

**Consume** content on travel related APP

**Make** mobile payments

**Purchase** tickets prior to traveling

**Review** on travel review sites



### Social Media



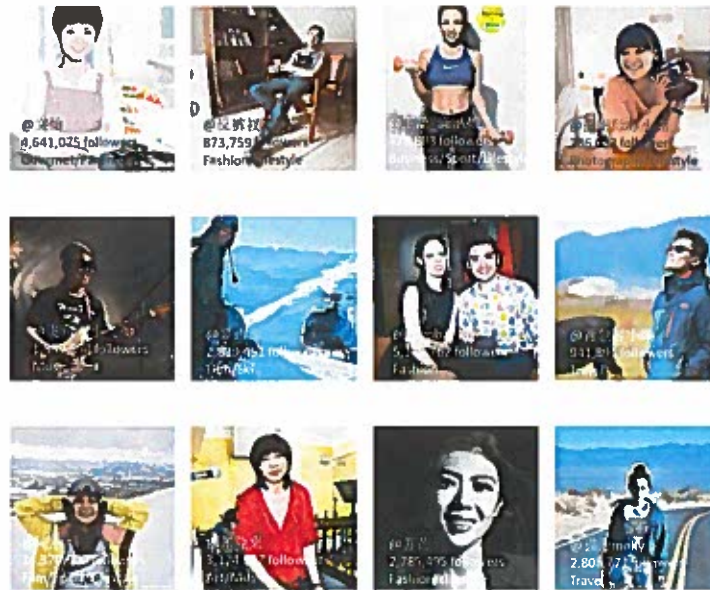
### Video



### Live Streaming

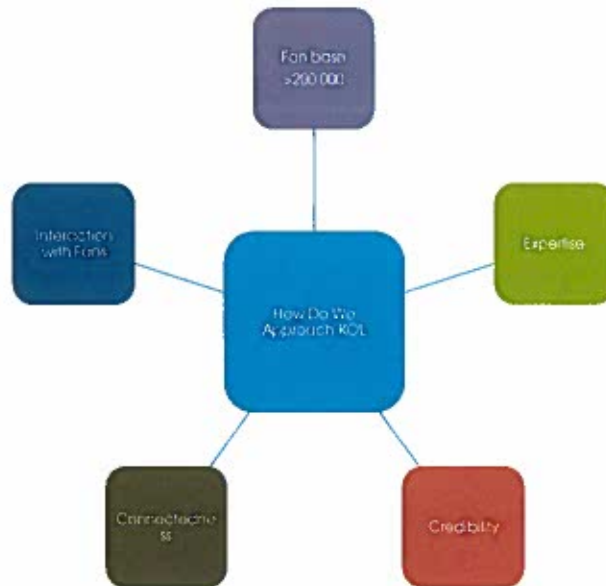


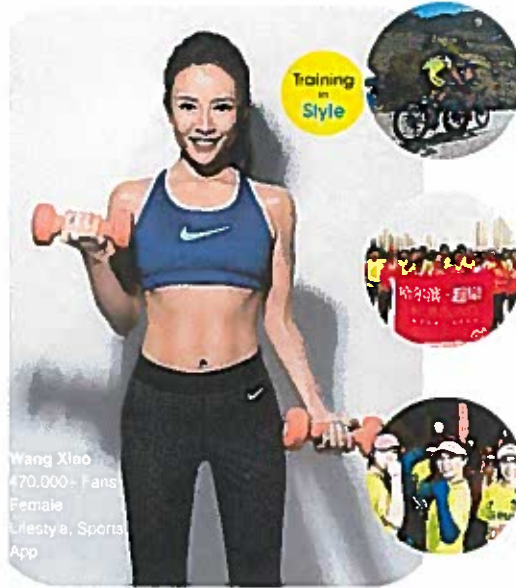
## FRIST, Who Is Going to Tell the Nevada Story



## How We Approach KOL

**KOL**  
Key Opinion Leaders  
Professional Bloggers/Influencer





Wang Xiao  
470,000+ Fans  
Female  
Lifestyle, Sports  
App

Program: World of Adventure  
Target: middle & upper class, sports lover



Wang Xiao will release the news and competition to choose one of her fans to have outdoor fun in Nevada



Wang Xiao and her fans will post and live stream their trip in Nevada with the hashtag #Don't Fence Me In#



Wen Yi  
4,640+ Fans  
Female  
Gourmet and Parenting Guru

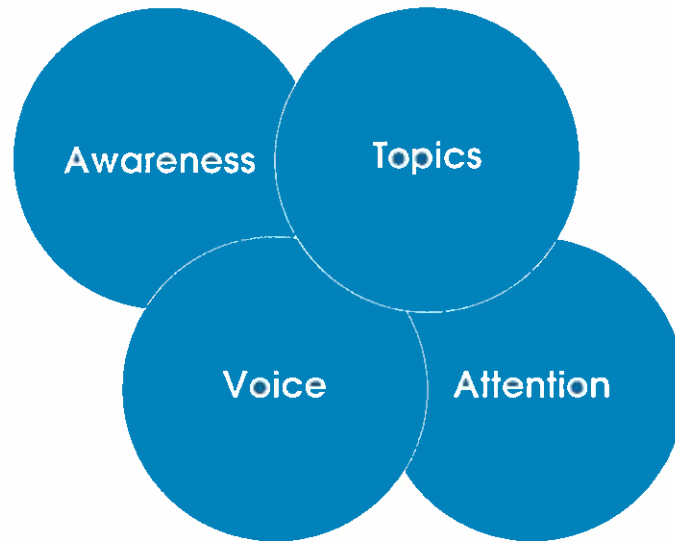
#Taste Nevada#  
Travel with kids  
Target: food & wine lover



#Family Fun in Nevada#  
Target: middle & upper class family

Wen Yi will post her family's trip and ask questions during the trip. The followers have the opportunity to win the prize from Nevada

## Key Words of KOLs Campaign



## Weibo Profile

### Facts

- 236 million monthly active users
- MAU increased 34% YoY to 236 million in December 2015
- Daily active users reached 106 million
- Unlimited posts
- Word limit - 140 characters
- Hashtag friendly



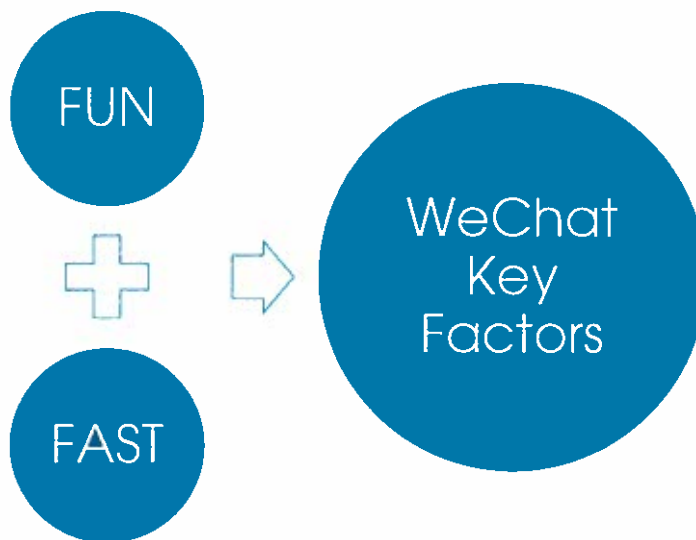
## Why WeChat?

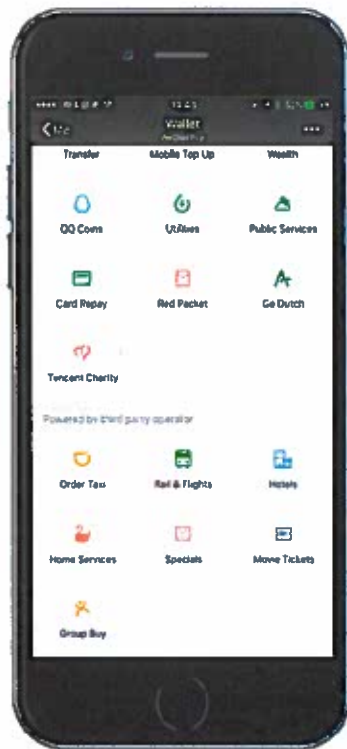
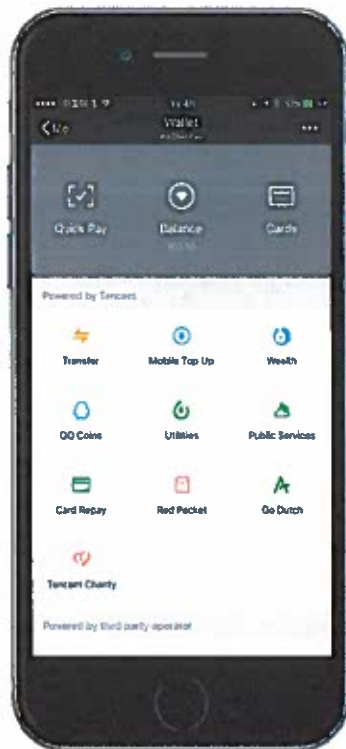


**806 Million**  
Monthly Active Users

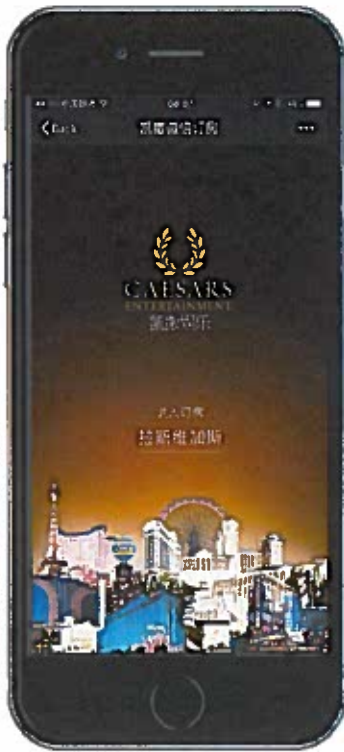
**1.2 Billion**  
Registered Private  
Accounts

## Key Factors

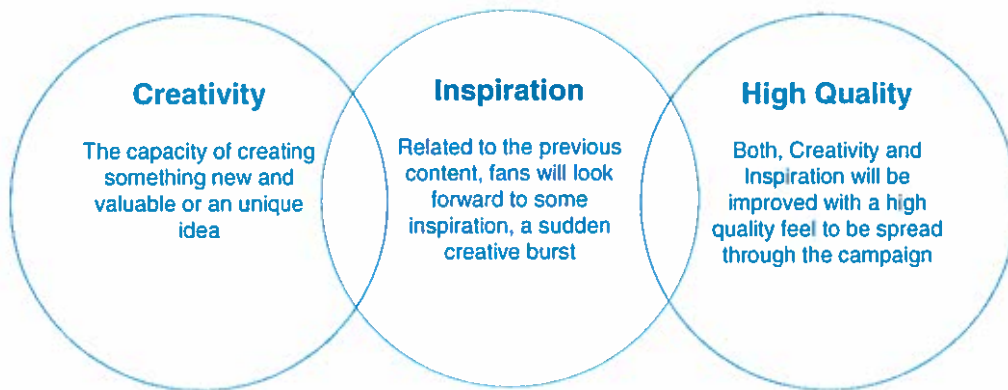




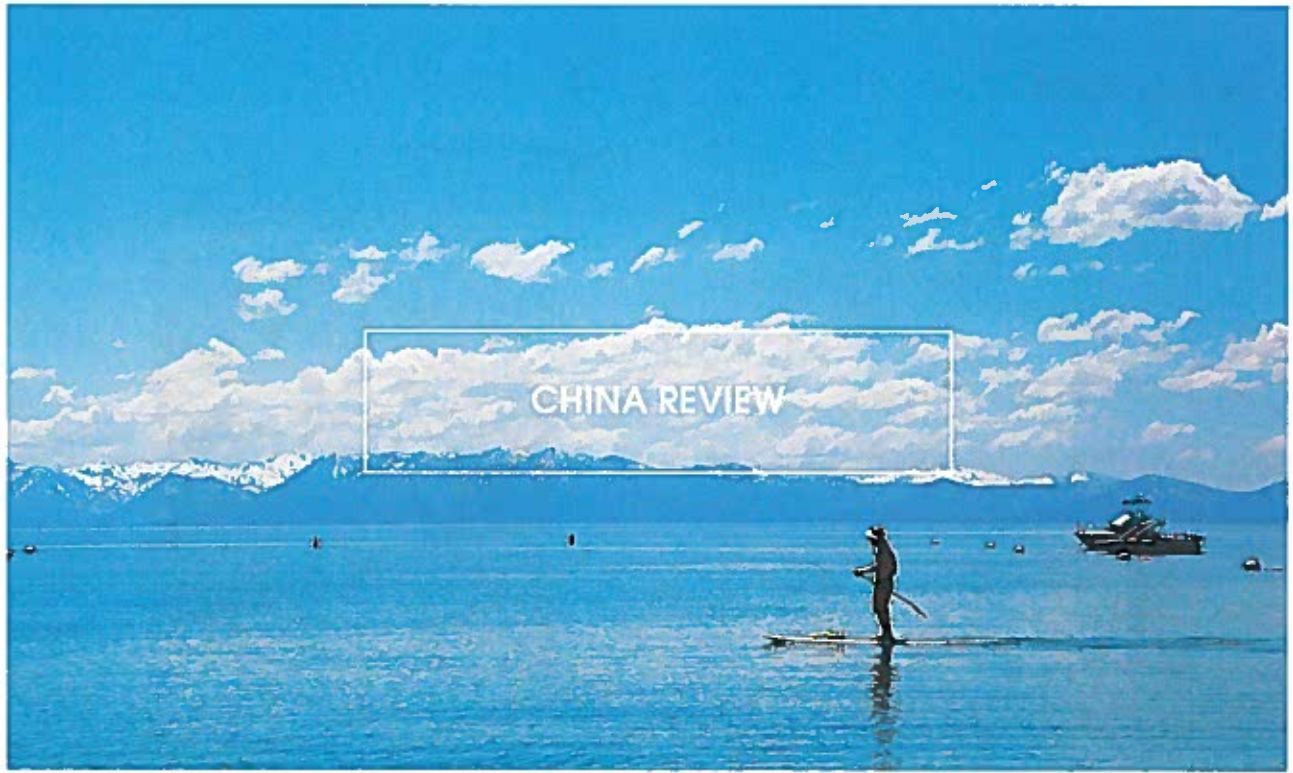




## Content Strategy







Laura Li  
Account Leader



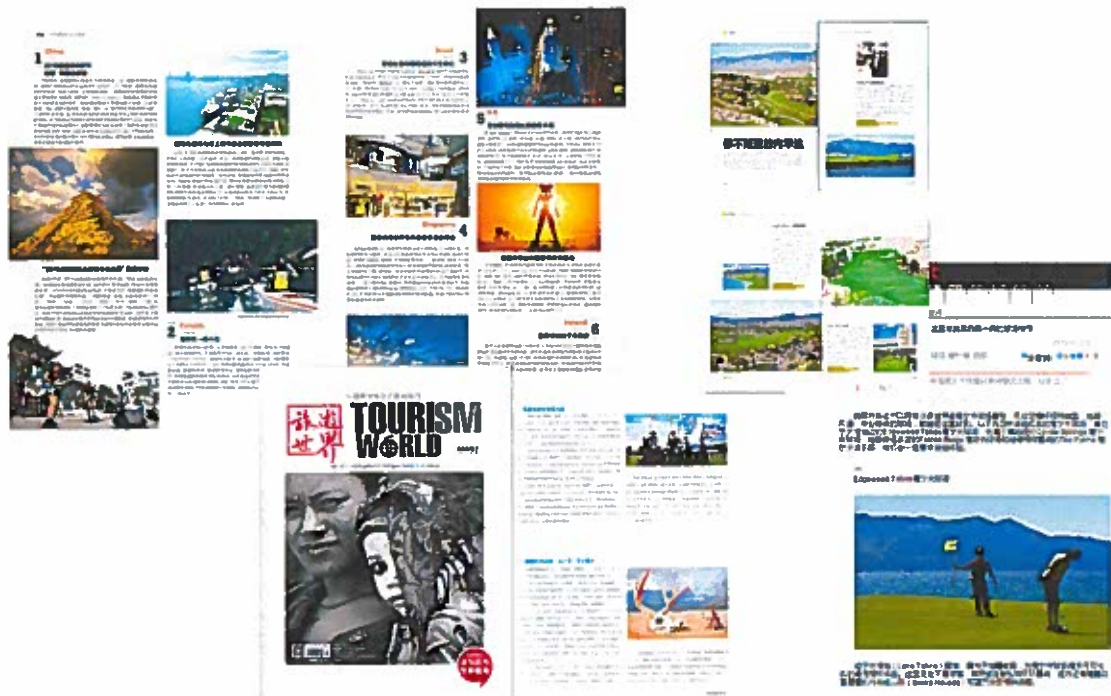
Chloe Wang  
Travel Trade  
Representative

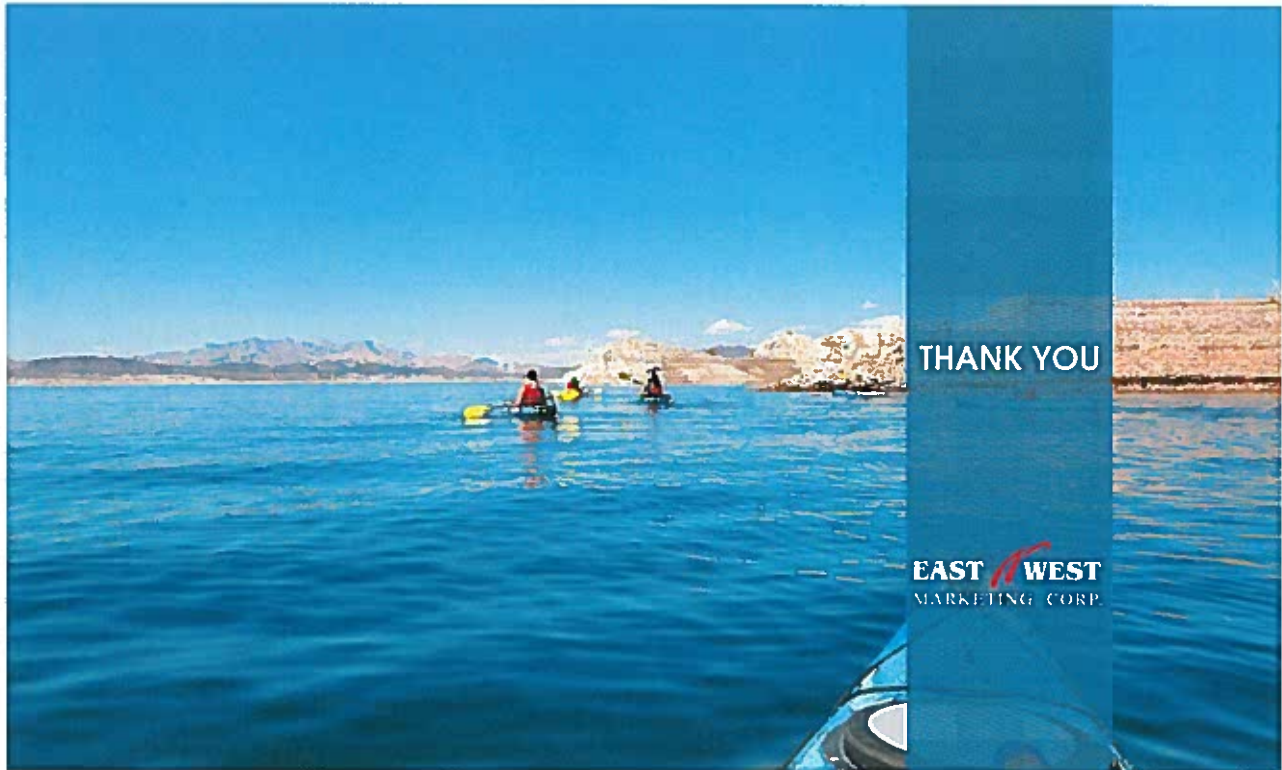


Jess Wu  
PR & Social Media  
Representative

## Review of Q1 FY 16

- Sales Calls: 15 sales calls were conducted in Q1 and discussed Nevada packages sales and cooperation opportunities, especially the opportunity of Hainan Airline non-stop service from Beijing to Las Vegas
- Media calls: 15 media calls
- Advertising Equivalent Value Generated: media coverage valued with \$1,428,542
- Social media: 53 posts on Nevada Weibo with 2,952 new followers in September; 7 posts on Nevada WeChat with 972 new followers in September







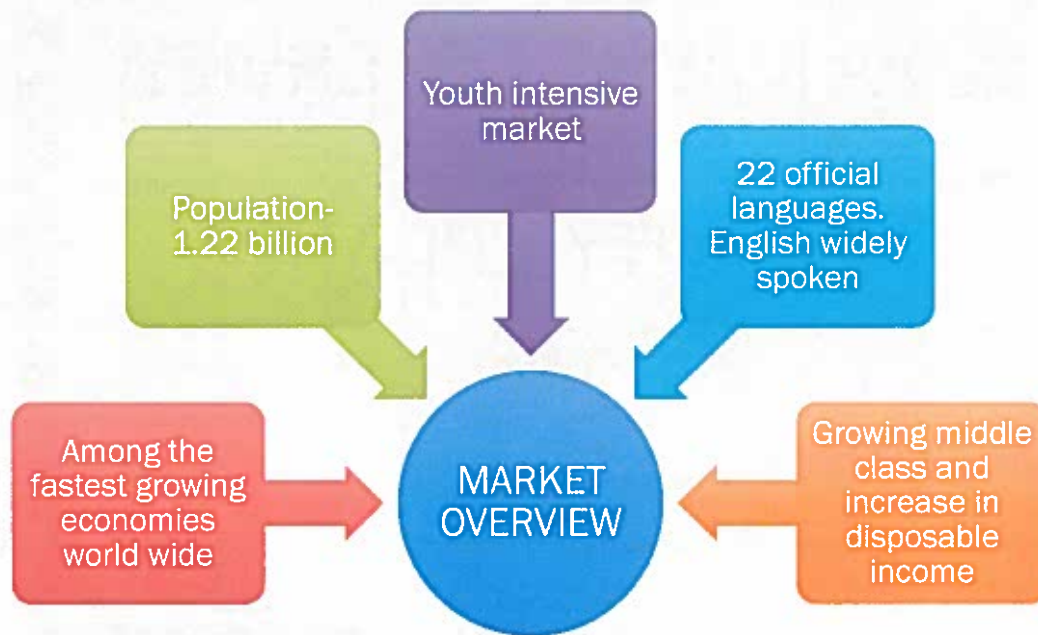
# INDIA MARKET OVERVIEW & ACTIVITY UPDATE



OCTOBER 2015 TO JUNE 2016

# MARKET OVERVIEW

## Market Overview



## India Outbound

- India's Outbound Market in 2014 was over 18 million and is presently estimated to be at 20 million
- India's outbound market is forecasted to reach 50 million by 2020
- Continuous growth seen in all segments – FIT, Groups, Special interest & MICE
- Travelers are well informed, sophisticated and educated; looking for new destinations/activities and out of the ordinary experiences – 'Living like a local'
- Major Drivers:
  - Sightseeing; Entertainment & Nightlife; Theme Parks & other Family attractions; Beaches & Water sports; Shopping; Adventure & Outdoor activities

# Outbound Travel Segments

GROUP TRAVEL

HONEYMOON

FIT

VFR

STUDENTS

CORPORATE

BUSINESS & LEISURE

MICE

## Airlift into the West Coast

Direct



QATAR AIRWAYS

Via Gulf

ETIHAD AIRWAYS

Emirates

Via Pacific

AIR CHINA



CATHAY PACIFIC

ANA

KOREAN AIR

Via Atlantic

Lufthansa  
Nonstop you

American Airlines

BRITISH AIRWAYS

TURKISH AIRLINES

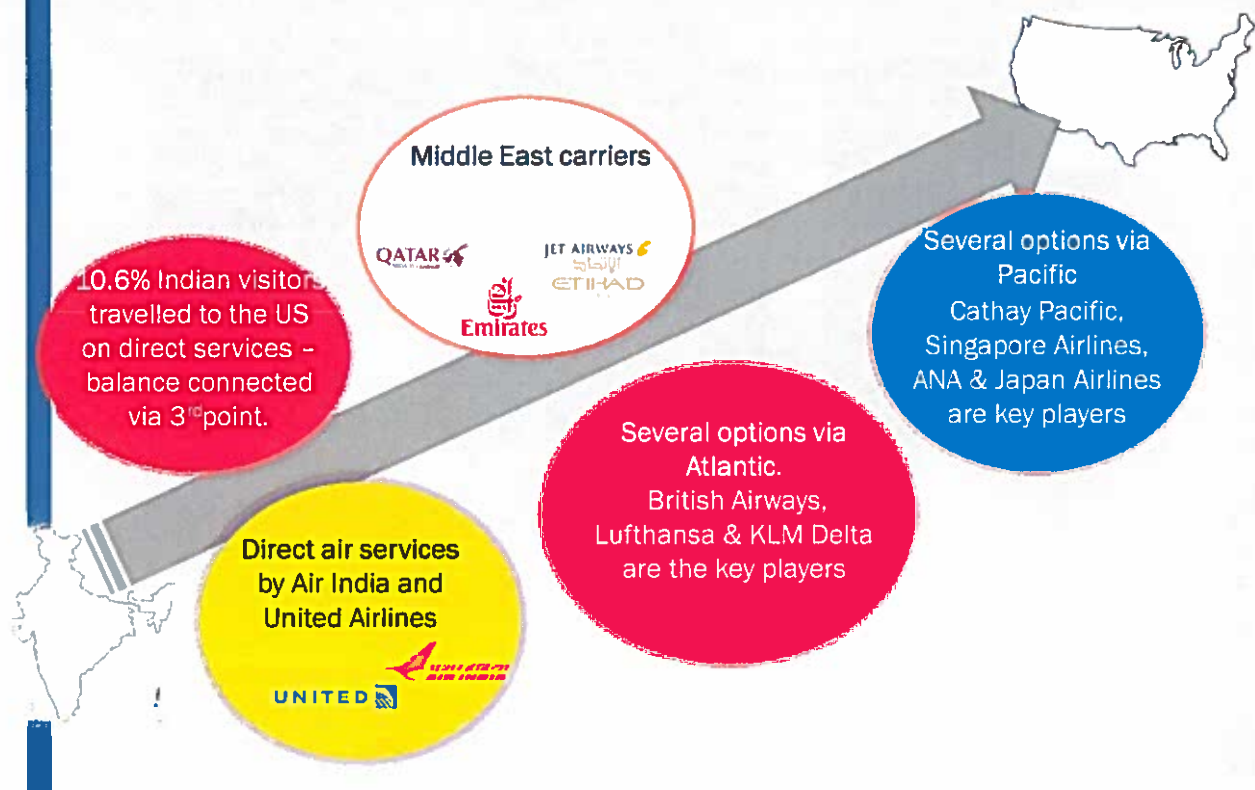
Virgin

AIRFRANCE / KLM / DELTA

atlantic

## Airlift into USA

All major airlines connect India to the USA



## Key Travel Periods

### Summer Holidays

- School vacation, April - July

### Fall Holidays

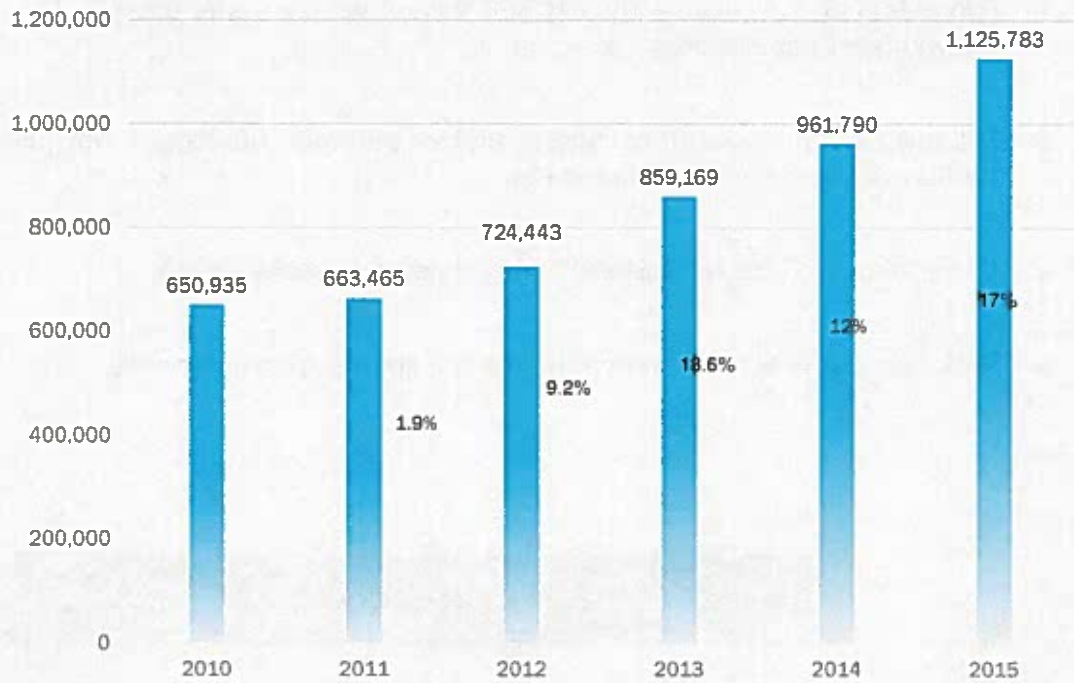
- Diwali / Dusshera - October/November

### Winter Holidays

- December ( Christmas/New Year)

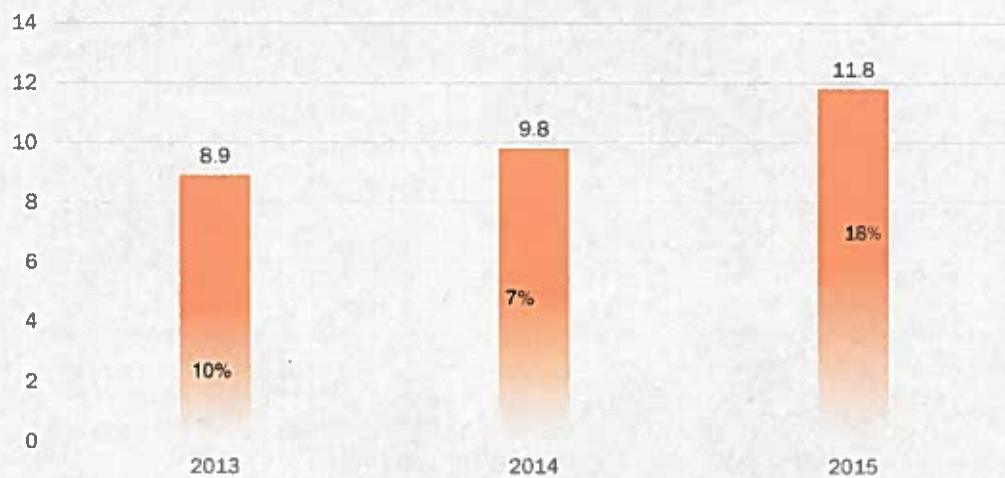


## Indian Arrivals into the U.S.



## Money Spent by Indian Travelers in the U.S.

MONEY SPENT IN BILLIONS



## Indian Millennials- New Age Indian Tourist

- Population of 1.3 billion with over 700 million people under the age 35 - the youngest population in the world
- Millennials want adventure, sports and experiential holidays - not just traditional sightseeing, shopping etc.
- Generation of 'Connect & Share' - major users of social media
- Prefer economical accommodation but will splurge on experiences



SNIPPET



UNIQUE SITES

EXPERIENCES

DIVERSITY

OUTDOORS



## India Digital Snapshot

TOTAL POPULATION



**1,319 MILLION**

URBANISATION: 33%

FIGURE REPRESENTS TOTAL INDIAN POPULATION INCLUDING CHILDREN

ACTIVE INTERNET USERS



**375 MILLION**

PENETRATION: 28%

FIGURE INCLUDES ACTIVE AND PASSIVE INTERNET CONNECTIONS

ACTIVE SOCIAL MEDIA USERS



**136 MILLION**

PENETRATION: 10%

FIGURE REPRESENTS ACTIVE SOCIAL MEDIA ACCOUNTS, NOT INACTIVE INDIVIDUALS

MOBILE CONNECTIONS



**1,012 MILLION**

vs POPULATION: 77%

FIGURE REPRESENTS MOBILE SUBSCRIPTIONS, NOT INACTIVE USERS

ACTIVE MOBILE SOCIAL USERS



**116 MILLION**

PENETRATION: 9%

FIGURE REPRESENTS ACTIVE MOBILE SOCIAL MEDIA ACCOUNTS, NOT INACTIVE INDIVIDUALS

## Forecast

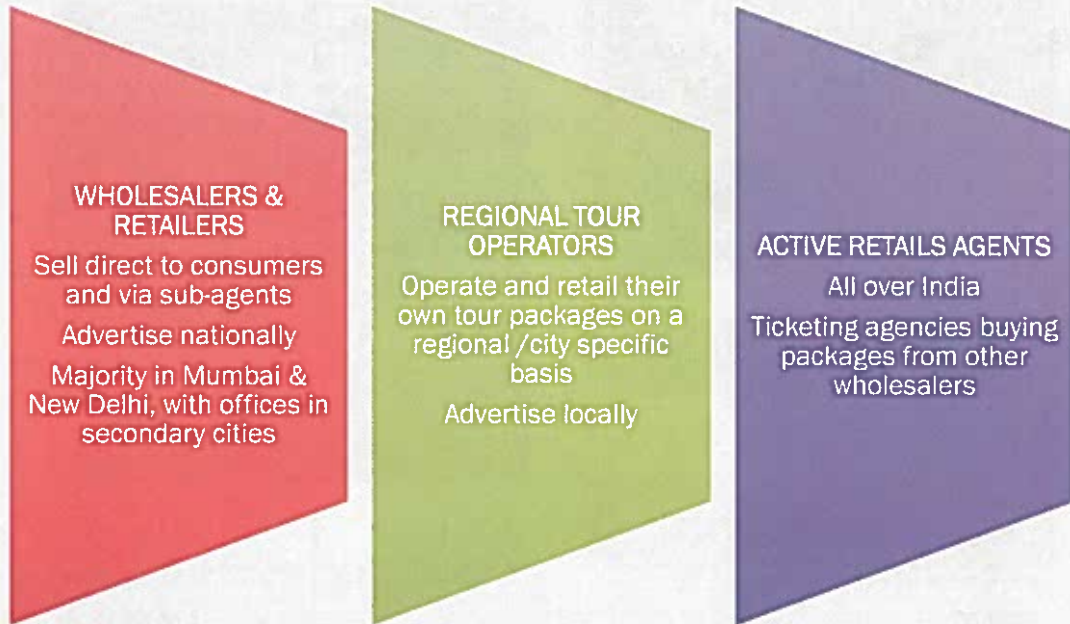
- Growing Mobile internet usage.
- Soon to be the world's fastest-growing smartphone market.
- The total number of mobile subscriptions in the country will reach 1.37 billion by 2021.

## India Social Media Snapshot

- Facebook has 125 Million MAUs in India, out of which 114 Million are mobile Facebook users. Making India the second largest Facebook users, after the US.
- Total number of Twitter users in India are 40 million; 79% users access Twitter on Mobile.
- LinkedIn crossed 30 million user base in India, a growth 50% compared to last two years.

# Indian Travel Trade Industry- Overview

- Mostly prefer working through land operators/ DMC's
- Travel agency staff have limited destination knowledge.



**NEVĀDA**  
A WORLD WITHIN.  
A STATE APART.

PROMOTIONAL ACTIVITIES

# TACTICAL CO-OPS

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A STATE APART.

**LIMITLESS ADVENTURES IN NEVADA, USA**  
On the road and off it.

**FLIGHT SHOP**  
Unbeatable

**NEVADA**  
A WORLD WITHIN.  
A STATE APART.

**THE DENIM HISTORY** 7-day tour  
Includes round-trip accommodations in Reno, Lake Tahoe, Tonopah and Las Vegas, daily breakfast, standard motor vehicle insurance, visit the Automobile Museum, Tickets for WT Doves Cruise. **₹ 9,900**

**LONELIEST ROAD** 8-day tour  
Includes round-trip accommodations in Reno, Lovelock, Elko, Ely and Austin, Daily breakfast, Self-drive rental vehicle, Standard motor vehicle insurance, Visit Great Basin National Park. **₹ 9,900**

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FLIGHTS | HOTELS | CUSTOMISED HOLIDAYS | FOREIGN | VISA | TRAVEL INSURANCE AND MORE.

PRINT

**Flight Shop**  
11 May 2019

Pyramid Lake, one of the most fascinating lakes in Nevada shimmers like a mirror cut of the stark surrounding desert landscape, with its defining pyramid-shaped island rising dramatically out of the water. #NevadaForExplorers

**NEVADA**  
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A STATE APART.

143 Likes

Mansi Jagtap, Ramesh Rane, Kulkdeep Kurar and 145 others like this

FACEBOOK

# TACTICAL CO-OPS

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Out Of Home Advertising

**LIMITLESS ADVENTURES IN NEVADA, USA**  
On the road and off it.

**FLIGHT SHOP**  
Unbeatable

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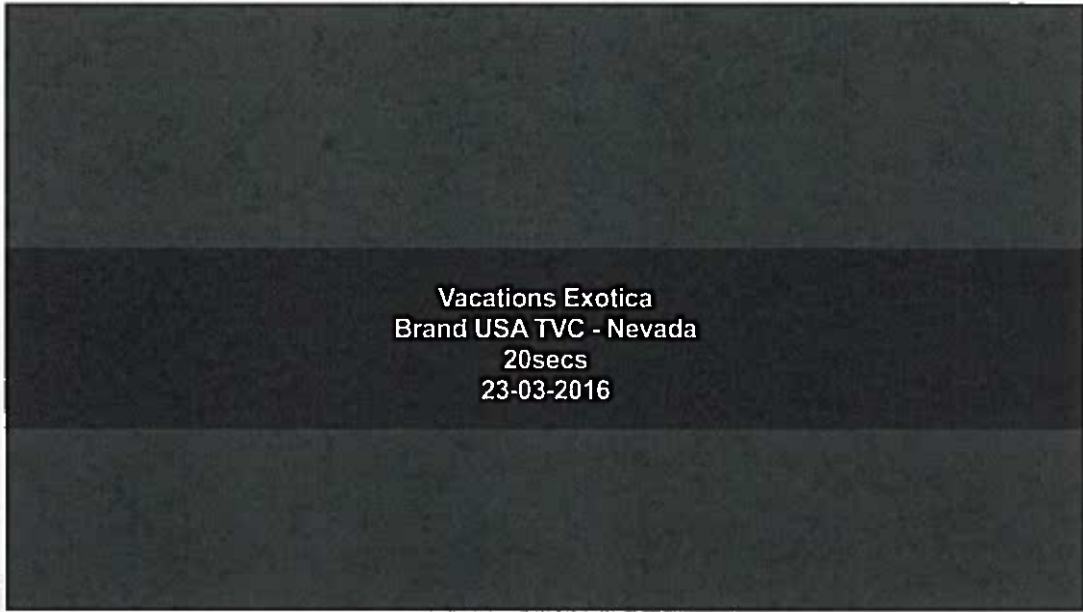
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**1800 200 6668**

Advertisement | Bangalore | Chennai | Delhi NCR | Jaipur | Mumbai | Pune | Hyderabad

Print

TVC



Vacations Exotica  
Brand USA TVC - Nevada  
20secs  
23-03-2016

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TRAVEL TRADE OUTREACH

# LT GOVERNOR'S VISIT

**NEVADA**  
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A STATE APART.



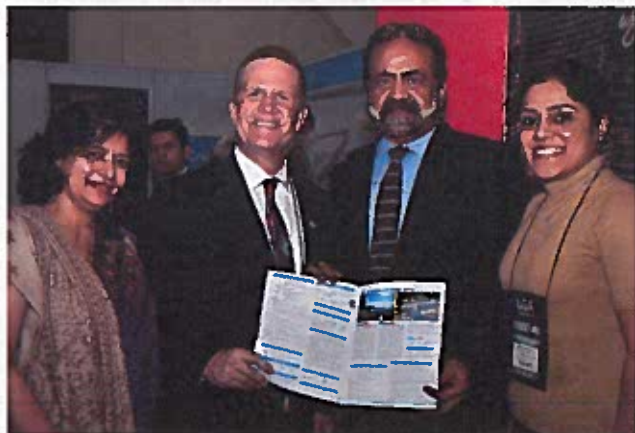
MEDIA INTERACTION

VIP DINNER



# SATTE 2016

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# EDUCATIONAL SEMINARS

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# IN-STORE MARKETING



Thomas Cook introduces the World's First Hotel Coupon for accommodation and meals at select hotels.

1868

Thomas Cook introduces the World's First Hotel Coupon for accommodation and meals at select hotels.

1874



# FAMILIARIZATION TRIP

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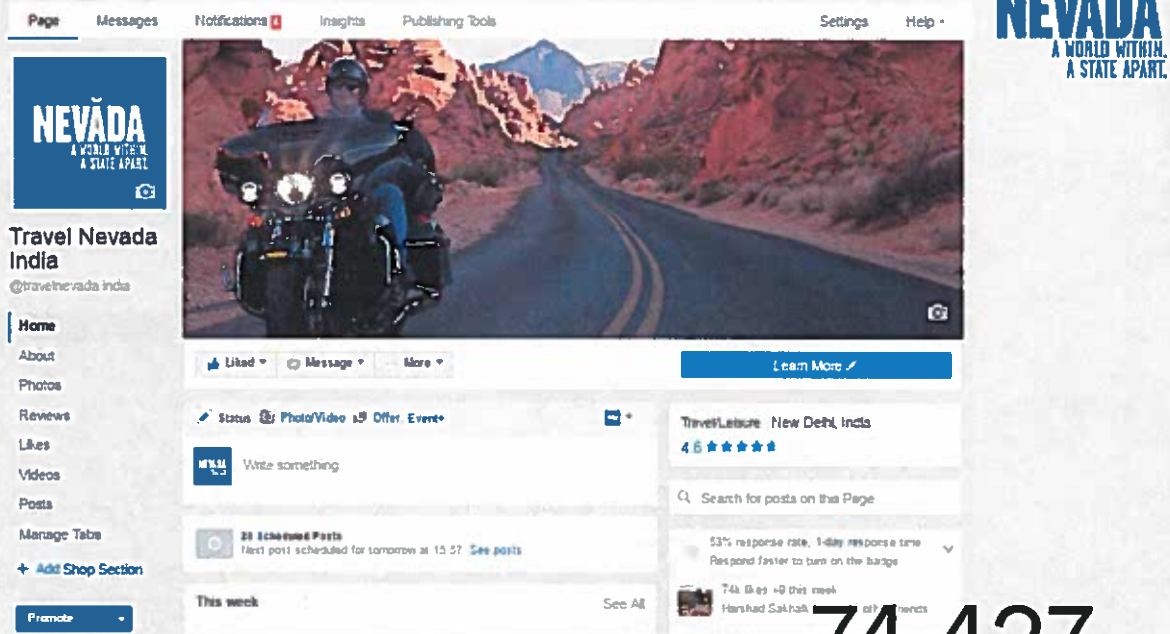
# BRAND USA INDIA MISSION

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# DIGITAL ACTIVATION

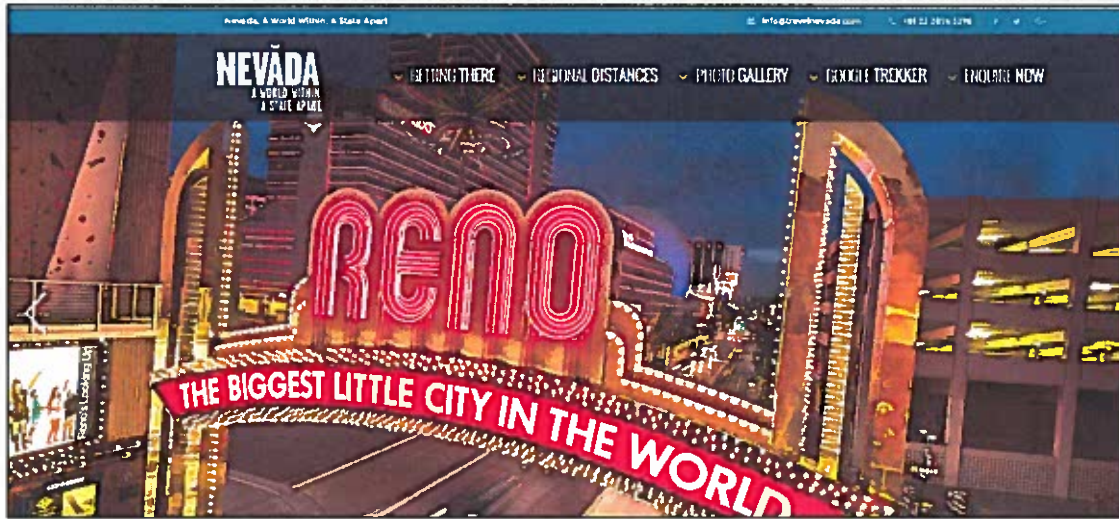


FACEBOOK PAGE – TRAVEL NEVADA INDIA

Launched in April 2016

74,427





LANDING PAGE – [www.travelnevada.in](http://www.travelnevada.in)



TRAVEL TRADE WEBSITE – [www.trade.travelnevada.in](http://www.trade.travelnevada.in)

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A STATE APART.

## PR ACTIVITIES

### FAMILIARIZATION TRIP

**NEVADA**  
A WORLD WITHIN.  
A STATE APART.



Las Vegas— Ely— Eureka— Austin— Reno -  
Virginia City— Lake Tahoe— Genoa



**BEEMED ACROSS THE DESERT**

**The empty streets channel the shock of robber messages from the BMW's**

**DELTA SALOON**

**SCIENCE TABLE**

**THE ROCK COUNTRY**

**DELTA SALOON**

**SCIENCE TABLE**

**THE ROCK COUNTRY**

**AUTOCAR INDIA - SEPT 2016**  
**Circulation - 1,70,000**

**Great Basin has a cool alpine climate even in the middle of Nevada's harsh summer.**

**off-roading while on the way. Save a few dollars by driving a car that's not too big, not too heavy, and not too big a car to drive in the middle of the state.**

**off-roading while on the way. Save a few dollars by driving a car that's not too big, not too heavy, and not too big a car to drive in the middle of the state.**

**Roads to Lamolle, Great Basin and Virginia City are fun to drive on. So hire a good car!**

**Driving in Nevada | Travel**

**their vintage cars at the National Automobile Museum in Reno. Photo: The Thomas Flannery**

**PLANNING YOUR NEVADA ROAD TRIP**

**1. Plan your route from Las Vegas and out to Lake Tahoe. This is the best choice of route to take, especially if you're not too far from Reno and Carson City. The route is also the most scenic, with the best views of the Great Basin and the Sierra Nevada. The route is also the most scenic, with the best views of the Great Basin and the Sierra Nevada.**

**2. Plan your route from Las Vegas and out to Lake Tahoe. This is the best choice of route to take, especially if you're not too far from Reno and Carson City. The route is also the most scenic, with the best views of the Great Basin and the Sierra Nevada.**

**ROAD TIPS**

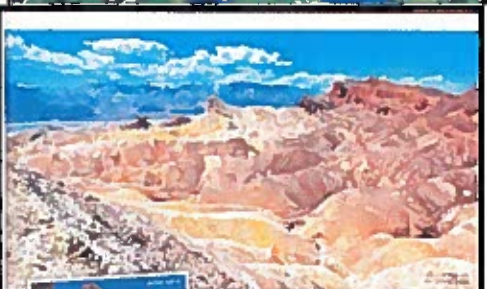
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# NEVADA

A WORLD WITHIN A STATE CAPITAL



# NEVADA

HEART OF THE GOLDEN WEST

**A**fter more than 100 years of being a state, Nevada has a rich and diverse history. From its early days as a Spanish colony to its role in the American West, Nevada has played a significant part in the nation's development. Its unique landscape, from the rugged mountains to the vast desert plains, offers a truly unforgettable experience. Whether you're looking for adventure or a peaceful retreat, Nevada has something for everyone.

From the high-altitude peaks of the Sierra Nevada to the sun-drenched valleys of the Mojave Desert, Nevada's diverse geography offers a wide range of outdoor activities. Hiking, fishing, and hunting are popular pastimes, while the state's numerous casinos and resorts provide a different kind of entertainment. The state's rich cultural heritage is reflected in its architecture, art, and traditions, making it a truly unique destination.

With its stunning natural beauty and vibrant culture, Nevada is a state that truly has it all. Whether you're a nature lover, an adventure seeker, or simply looking for a change of scenery, Nevada is the perfect destination for you. Discover the heart of the Golden West and experience the beauty and excitement of this remarkable state.



The Nevada State Fair is a major event that draws thousands of visitors each year. The fair features a wide variety of exhibits, including agricultural displays, livestock shows, and entertainment. It's a great time to enjoy the state's natural beauty and learn about its history and culture. The fair also offers a chance to taste some of the state's delicious food and drink.

Another popular event in Nevada is the Burning Man festival, which takes place in the desert each year. The festival is known for its unique art installations, music, and community spirit. It's a truly unforgettable experience that draws people from all over the world. The festival also offers a chance to enjoy the state's natural beauty and learn about its history and culture.

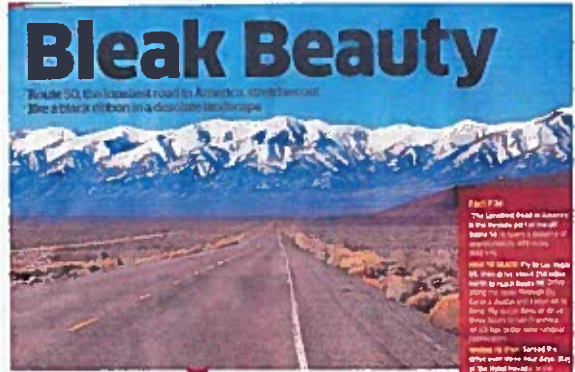


NEVADA  
HEART OF THE GOLDEN WEST



## NATIONAL GEOGRAPHIC TRAVELER INDIA - AUG 2016

Circulation - 60,000



# Bleak Beauty

Roadside 501, the landscape road in America's southwest, is like a black ribbon in a desolate landscape.

**T**he road winds through a desolate landscape, its black asphalt ribbon cutting through the vast, open desert. The road is a marvel of engineering, built to withstand the harsh conditions of the southwest. It's a road that offers a unique perspective on the region's natural beauty and history.

The road is a true masterpiece of engineering, built to withstand the harsh conditions of the southwest. It's a road that offers a unique perspective on the region's natural beauty and history. The road is a true masterpiece of engineering, built to withstand the harsh conditions of the southwest.

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**Las Vegas** is a city of contrasts, where the neon lights of the Strip meet the rugged beauty of the desert. The city is a true melting pot of cultures, offering a unique experience for everyone. Whether you're looking for a night of entertainment or a peaceful retreat, Las Vegas has something for you.



**Working Great** is a new concept in Las Vegas, offering a unique experience for everyone. The concept is simple: a great meal, a great drink, and a great view. It's a truly unforgettable experience that draws people from all over the world.

**The Green Point Archaeological Area** is a truly remarkable site, offering a glimpse into the lives of the people who lived there thousands of years ago. The site is a true treasure trove of history and culture, and it's a must-visit destination for anyone interested in the region's past.

**The Green Point Archaeological Area** is a truly remarkable site, offering a glimpse into the lives of the people who lived there thousands of years ago. The site is a true treasure trove of history and culture, and it's a must-visit destination for anyone interested in the region's past.

# The adventures of Mark Twain

Experiencing 'fiction' during long days of boredom in a little-known back country town in Nevada

By CHARUEZSI RAMADUBAI

Nobody knows for sure whether Mark Twain really said this: "I never let the truth get in the way of a good story." But if he did, then it was most certainly during his short stint as a journalist in Virginia City, Nevada.

With a population of just over 850, Virginia City is one of those one-horse towns that dot America's Wild West. Indeed, it is one of those towns with more daily visitors than residents in some months.

It was not always like this though. At the height of the gold rush, in the mid-1860s, Virginia City was a boomtown more prosperous than San Francisco

Apart from the gold, this town came into its own with the Comstock Lode in 1859—the most significant discovery of silver ore in the country.

Among the hopefuls who headed West during this time was Mark Twain (then Samuel Clemens of Missouri), who went with his brother, hoping to—literally—strike gold. He soon gave up his gilt-edged dreams and joined a local newspaper, the *Territorial Enterprise*, as a local reporter. The year was 1861.

It was early on in this stint that he first signed off on a story as Mark Twain, a term from his days as boat crew on the Mississippi river. The byline stuck.

In Virginia City, Twain refined his skills not only in writing but also storytelling, actually making up tales where none existed. And it was indeed the kind of place where nothing much happened by way of exciting news. So much so that he once wrote to his mother: "Even the devil



would be homesick in Nevada."

In his obituary, *The New York Times* called Twain the greatest humorist the US has ever produced. However, he did take his ha ha's too far occasionally.

His yarn about the discovery of a petrified Shab, who lived over a century ago, did not elicit much public comment. However, another one about a man in Carson City who killed his wife and nine children was so gory that there was major outrage.

His editor—who seemed tickled by his creativity—bashed him up then. And Twain carried on in this vein for the next year or so, till he left town.

After decades, the *Territorial*



Twain country: (top) The office of the *Territorial Enterprise* now houses the Mark Twain Museum; and the early editor Tom Sawyer books in the museum.

*Enterprise* has recently been revived into a spiffy website, which proudly claims that their writers, such as Mark Twain, caught the attention of readers with "outlandish and sometimes satirical folk writing techniques, including the 'tall tale'."

The *Territorial Enterprise* seems to have made a habit of tall tales. In 1959, then editor Rob Richards cooked up a story about a local camel race. The news item on the fake race was picked up by the wire services. Understandably, more than a few editors were furious when the hoax was revealed.

To get even with Richards, the *San Francisco Chronicle* came to town with camels the next year, challenging the *Territorial Enterprise* to a race. Other newspapers followed suit, and the rest, as they say, is racing history.

Fifty-seven years on, the town continues to derive much enjoyment from camel and ostrich races, which over 10,000 people now attend (this year, they are going to be held from 9-11 September). As I walk up and down the single main road lined with bars, I wonder how they all fit into this space. To top it all, zebras and emus have lately been thrown into the mix, in the spirit of the more the merrier.

The best part is, the camels themselves have no idea that they are in a race, so they go any which way they want. And it's great fun for the spectators," says Bethany Drysdale, from the state museum board.

Although Twain worked in Virginia City for just over two years, there is no doubt that he is the town's favorite son. Saloons are named after him, and signboards everywhere announce the town's purported role in the evolution of Clemens into Twain.

The crew-hale office of the *Territorial Enterprise* has now been converted into the Mark Twain Museum. And that is where I head first. This museum is further proof of how the town wants to hang on to his legacy; there isn't much of Mark Twain in the dusty basement room except his work desk, the printing presses from his time there, a couple of early-edition Tom Sawyer books and, believe me here, a wooden potty that claims close association with the writer.

The laugh in me is still inordinately pleased.

Now, if only I could find the hat from which he conjured up the stories that kept him going through those dull days.

Write to [ksange@livemint.com](mailto:ksange@livemint.com)

MINT LOUNGE

AUG 2016 || Circulation - 300,000



# SEVEN MAGIC MOUNTAINS

## PRESENTATION

David B. Walker, Executive Director / CEO  
Amanda Horn, Director of Communications

## LINKS

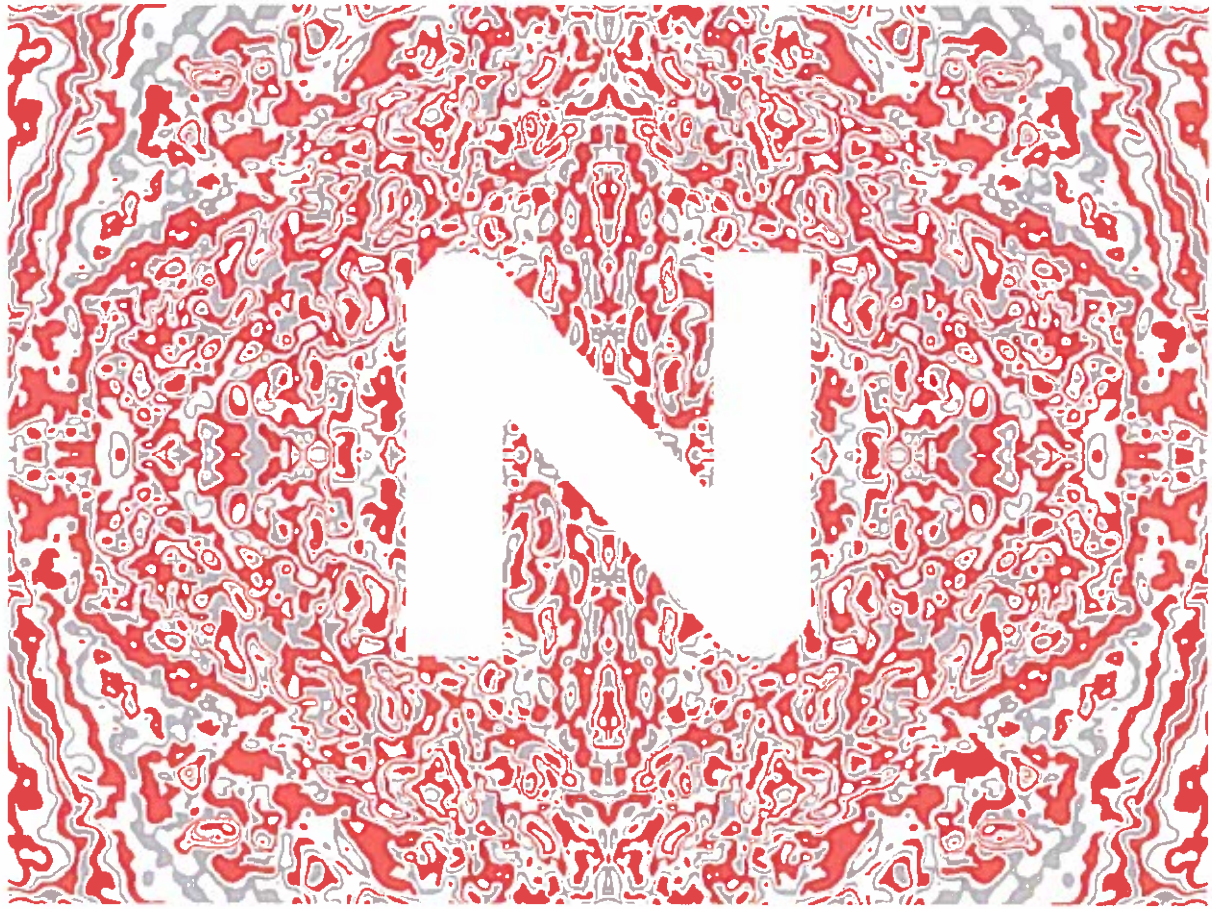
Media Report for April 1 through September 20:

<http://app.criticalmention.com/app/#/report/a6aff2d5-3723-40b9-b8b8-dc5e97e42b13>

Press Book:

[https://www.dropbox.com/s/iu5tne3u2c26m7p/SevenMagicMountains\\_PressBook2016.pdf?dl=0](https://www.dropbox.com/s/iu5tne3u2c26m7p/SevenMagicMountains_PressBook2016.pdf?dl=0)

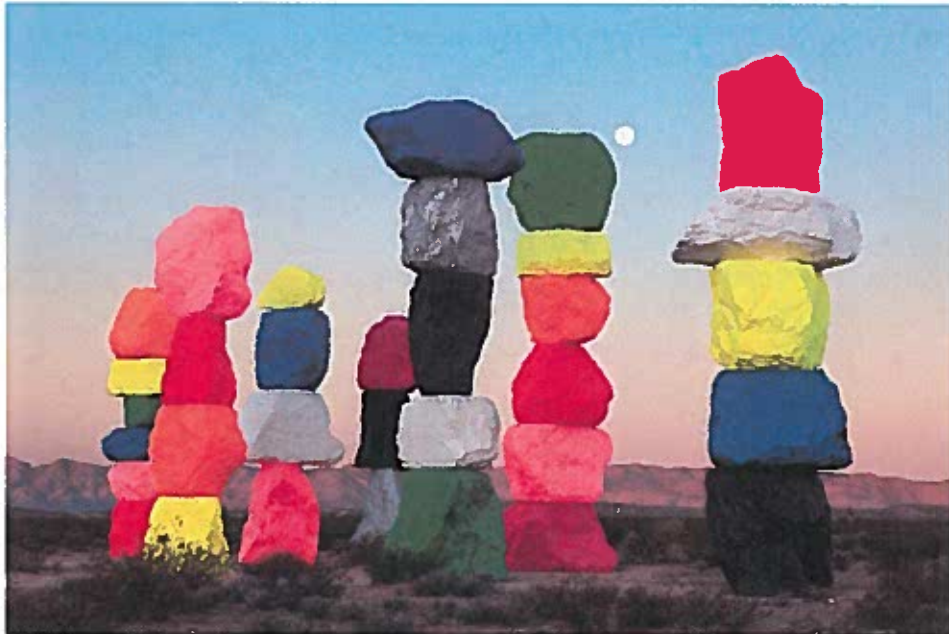




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*Making Seven Magic Mountains*

Filmed + Edited by Las Vegas Film Festival



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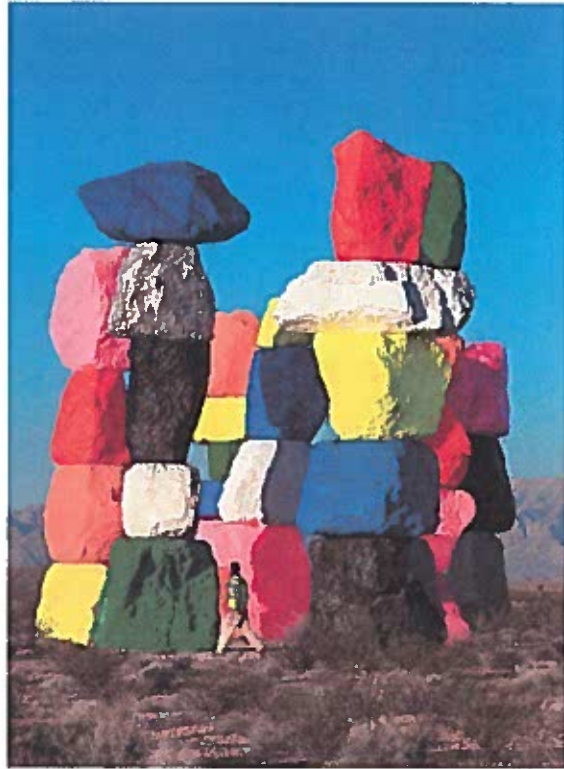
ADDITIONAL SUPPORT

Fairchild Consulting Group  
John Kral  
Las Vegas Convention and Visitors Authority  
Las Vegas Film Festival  
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SPECIAL THANKS

Gladstone Gallery





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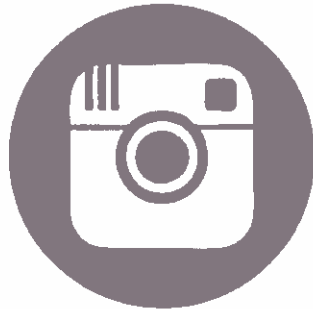
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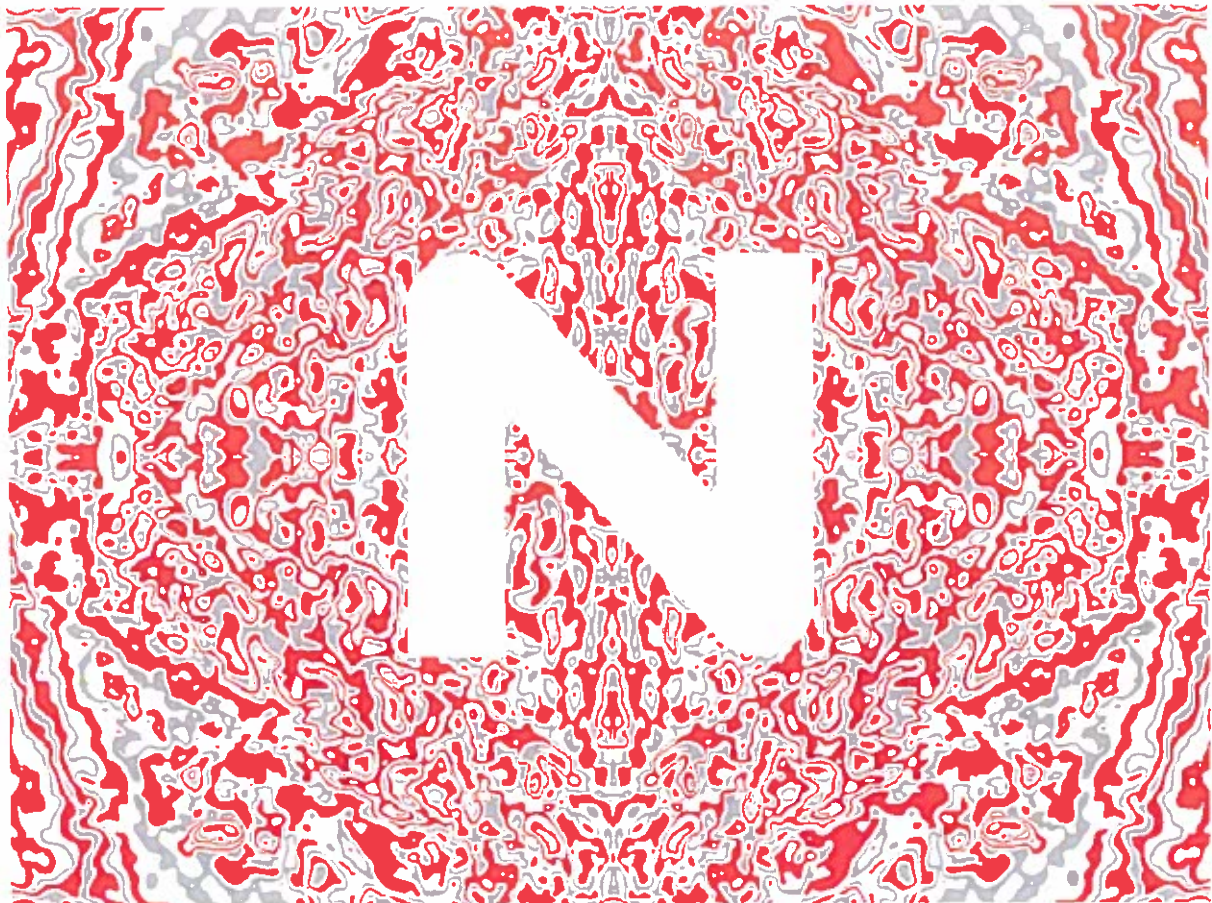
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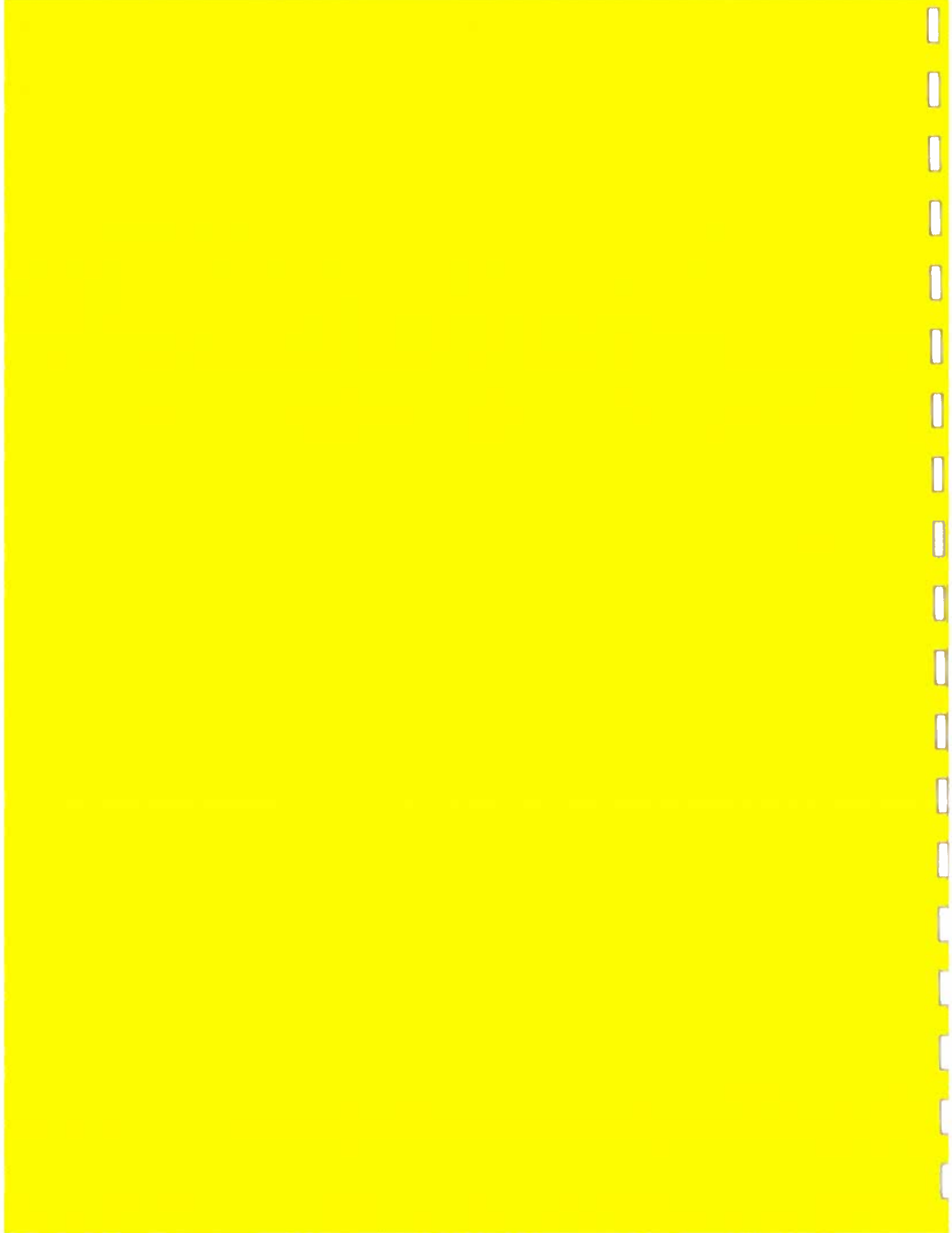
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# Reports

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Nevada Division of Tourism  
 1st Quarter, FY17 Report  
 October 11, 2016

**Overarching Annual Goals**

1. Drive revenue to the State of Nevada through travel and tourism activities.

KPI	Activity (per quarter)	Tracking to Goal
Track lodging, entertainment and gaming tax (primarily during campaign timeframes) to identify TravelNevada's impact on the statewide economy.	Discover the Facts completed for 2 <sup>nd</sup> quarter 2016. Most recent report is available at TravelNevada.biz.	25%

2. Raise brand engagement for consumers, travel trade professionals and partners. Performance will be based on a year-over-year increase in each user engagement activities.

KPI	Activity (per quarter)	Tracking to Goal
Ensure the TravelNevada.com website is easy for consumers to use and offers not only information, but an impetus for consumers to buy. Enhance consumer engagement through sharing and other social media programming. The simple measurement includes the number of engaged users.	TravelNevada.com is undergoing development to ensure the site mirrors the campaign evolution and provides a more efficient track from information to purchase. The site will be ready for launch with the Fall/Winter marketing campaign in November.  Once the site is live, Fahgren will provide ongoing tracking as to how the users are using the site, traveling down the purchase funnel and ultimately making the purchase.	20%

Provide increased opportunities for consumers to link to statewide industry partners.	No activity this quarter.	0%
Create robust mobile platforms, including an app that provides both travel and educational information.	The mobile app was launched in 2016 and is being refined to match the website. Work continues on getting the educational content added to the "Around Me" section of the app.	25%
Identify opportunities for engaging Nevada tourism industry partners with consumers and the travel trade.	Nevada industry partners will be able to interact with approximately 70 buyers and media at the 2016 Global Tourism Summit. Coordination for this event occurred throughout the first quarter.	25%
	TravelNevada provided opportunities for the industry to attend the Governor's Trade Mission to Australia in July/August.	

3. Increase domestic integrated marketing campaign return-on-investment

KPI	Activity (per quarter)	Tracking to Goal
ROI determined based on paid, earned and social (owned and earned) media efforts. Current ROI is 33:1 for paid (only) advertising.	Current ROI is 77:1 based on the TNS study of the Fall/Winter 2015/16 campaign. This incorporates the new methodology that integrates paid, earned and owned media. Campaign measurement continues with testing for the Spring/Summer 2016 campaign in the field.	25%

4. Expand partner marketing and business development opportunities. Performance will be based on the number of partners participating in TravelNevada programming measured by year-over-year growth.

KPI	Activity (per quarter)	Tracking to Goal
Rural Marketing Grants	Five new organizations applied for the 2 <sup>nd</sup> cycle rural marketing funds.	50% (based on two grant programs)
Cooperative Marketing program	Fall Insert – 16 partners (same as the 2015 Fall insert)	0%
Annual conferences	Governor's Global Tourism Summit – attendance tracking about even with the last time the conference was in Reno (260 attendees)	10%
Use of the TravelNevada.biz website	In process as the site is enhanced.	0%
Number of partners uploading images and information on the	Image library platform will be changing and should be ready for use in 3 <sup>rd</sup> quarter FY17.	0%

<p>TravelNevada.com website</p> <p>Number of partners sharing TravelNevada information via social media</p>	<p>In FY16 (added to show benchmark for FY17)</p> <p><b>Facebook</b></p> <ul style="list-style-type: none"> <li>• We increased our fans (followers) by 8% over FY15.</li> <li>• We gained 9,357 new fans earning a total of 131,841 fans. We had a total of 122,484 fans at the end of FY15.</li> <li>• We earned 116,793 total engagements (89,490 reactions, 8,983 comments, and 18,320 shares). That's a 17.7% engagement increase over FY15.</li> </ul> <p><b>Twitter</b></p> <ul style="list-style-type: none"> <li>• We increased our followers by 16.2% over FY15.</li> <li>• We gained 4,118 new followers earning a total of 29,506 followers. We had a total of 25,388 followers at the end of FY15.</li> <li>• We earned 22,096 total engagements. That's a 174.9% engagement increase over FY15.</li> </ul> <p><b>Instagram</b></p> <ul style="list-style-type: none"> <li>• We increased our followers by 353.4% over FY15</li> <li>• We gained 17,403 new followers earning a total of 22,327 followers. We had a total of 4,924 followers at the end of FY15.</li> <li>• We earned 373,635 total engagements (365,131 likes and 8,504 comments). That's a 17,449.8% engagement increase over FY15.</li> </ul>	
<p>Percentage of sister agency inclusion in appropriate programming</p>	<p>Images taken for the State Map (partnership with NDOT)</p>	<p>10%</p>

5. Continue to raise awareness of Nevada as a tourism destination within identified international markets

KPI	Activity (per quarter)	Tracking to Goal
<p>Create consistent sales and marketing outreach to identified markets</p>	<p>No activity this quarter</p>	<p>0%</p>
<p>Offer educational and business development opportunities for</p>	<p>Global Tourism Summit coordination occurred throughout the quarter.</p>	<p>30%</p>

<p>partners to strengthen understanding of successful international marketing including the Governor's Global Tourism Summit</p>	<p>Plans are underway for the Mexico sales mission in October.</p>
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6. Enhance key stakeholder understanding of the value of the travel and tourism industry and the impact the funding provided to the Division of Tourism has on the state's economy.

KPI	Activity (per quarter)	Tracking to Goal
<p>Conduct stakeholder outreach program to ensure messages salient to each audience are conveyed on a timely and consistent basis.</p>	<p>PR team worked with the Northern Nevada Business Weekly on a special supplement to run in October, outlining the work of the agency and striving to convey its value.</p>	<p>25%</p>
<p>Engage the industry in the conversation around the value of tourism and its impact on local economies.</p>	<p>Planning is underway to engage the industry as the legislative session nears.</p>	<p>10%</p>
<p>Involve Nevada's tourism territories in conveying information pertaining to each territory's reliance on the travel and tourism industry.</p>	<p>Travel Nevada research staff is beginning to attend Territory meetings and convey the agency's research in an attempt to provide consistent messages for all Territories.</p>	<p>25%</p>

## Key Initiatives – Quarterly Results

### 1. Amplify Domestic Sales and Marketing

#### Research

#### Key Performance Indicators (KPIs)

KPI	Activity (per quarter)	Tracking to Goal
Finalize IMC research model	Completed in FY16.	N/A
Complete advertising effectiveness studies (Springs/Summer, Fall/Winter)	Fielding for S/S campaign	10%
Complete semi-annual economic impact study	Dean Runyan presented at September Commission meeting – Impacts through 2015	100%
Ensure research is incorporated into all marketing campaigns	Tracking implemented in all digital placements; optimization ongoing	25%

#### Public Relations Driven Integrated Domestic Marketing Program

#### Key Performance Indicators (KPIs)

KPI	Activity (per quarter)	Tracking to Goal
Two media missions to major markets are developed and executed per year	Denver/Boulder in September; Salt Lake City in September	100%
Two in-market press trips for domestic media are developed and hosted per year, with trip ROI determined for each	Planning January press tour	25%
Media coverage provides at least	Q1 media value = \$4,326,637. ROI not calculated until media expenses are totaled, but will	100%

a 15:1 return on investment	undoubtedly hit the 15:1 ROI goal	
Quarterly feature coverage in "A priority" media outlets	VIA magazine (Sept) cover on Elko; Forbes (Aug) story on visual storytelling; FoxNews.com (Sept) roundup of mountain coasters;	100%

**Paid Advertising/Creative Development (Domestic)**

**Key Performance Indicators:**

KPI	Activity (per quarter)	Tracking to Goal
Campaign return-on-investment increases year-over-year	Fall/Winter was \$77:1 as presented in the Integrated Marketing Communications Effectiveness Study 7/28. Spring/Summer campaign data being analyzed	25%
Paid advertising moves to an "always on" platform	Paid advertising continues to include year-round. 28% of annual budget	25%
Statewide brand is integrated across all state agencies engaged in marketing	New logo on .gov; working with NDOT on state map and aviation map, DTCA branded business cards	25%
Cooperative marketing program engages more statewide partners (year-over-year) and extends the brand to a \$500,000 additional advertising investment	Developed Fall insert with Madden Media offering ad placements, related editorial, digital promotion and lead generation for four months, planning for Domestic Mandarin campaign	25%
Innovative loyalty program is launched with return-on-relationship measures in place to track tangible and intangible program impacts	Still in planning stages	0%



Digital Development

**Key Performance Indicators (KPIs)**

KPI	Activity (per quarter)	Tracking to Goal
Specification and implementation of new technology to enable dynamic content production, engagement campaigns and social promotions	Website usability study and staff review of website to implement visitor selection of POI's for use in the booking process; began implementation of Chute API, which curates User Generated posts related to Nevada	25%
Conduct at least two seasonal consumer promotions per year	Conducted OfferPop promotion which collected user emails and built brand awareness through a Balloon Race cross-promotion and ride give-away	25%
Increase engagement in all social channels, as well as the total "subscriber community" including new email leads	July consumer email sent; implement "personas" in September email send	25%
Stimulate engagement with at least 4 new, innovative tactics including Instagram Takeovers, etc.	Created 360 virtual reality video and posted on social channels.	25%

Discover Your Nevada

**Key Performance Indicators (KPIs)**

KPI	Activity (per quarter)	Tracking to Goal
Increase inquiry among Nevadans due to this promotion by 10% year-over-year. FY16 will be a benchmark year.	Benchmark is 110 inquiries	N/A
Generate a 15:1 program ROI via earned media coverage	Calculations not completed	50%

<p>Show an increase in Nevadans traveling within the state. Current percentage is 7.82%</p>	<p>Calculations not completed</p>	<p>50%</p>
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**Domestic Sales Outreach**

**Key Performance Indicators (KPIs)**

KPI	Activity (per quarter)	Tracking to Goal
<p>Boost travel trade leads by 2% per show, year-over-year</p>	<p>Attended ASTA Global Convention in Reno. The event was attend by more than 700 tourism professionals including media, sales, tour operators, wholesalers, receptives, etc. from more than 25 countries. Generated 35 leads.</p>	<p>Completed.</p>
<p>Create two additional opportunities for partners to gain a presence at travel trade shows</p>		
<p>Develop and host one (1) in-market FAM trip with domestic buyers</p>	<p>TravelNevada in partnership with the LVCVA organized and lead two post conference fams for Virtuoso agents who attended and annual conference in Las Vegas. Two itineraries were developed showcasing area attractions.</p>	<p>Completed.</p>
<p>Track presence at consumer shows, measurement to include number of visitor guides distributed, estimated number of consumers engaged</p>	<p>400 visitors guides were distributed at the Vancouver International Travel Expo in September.</p>	<p>Ongoing though participation in consumer shows for staff isn't scheduled for the remainder of this fiscal. We will be providing travel guides to Territories to distribute as requested.</p>
<p>Develop Travel and Adventure Show contest to boost consumer database</p>		

Nevada Magazine

**Key Performance Indicators (KPIs):**

KPI	Activity (per quarter)	Tracking to Goal
Increase advertising sales by 5% year-over-year	July/Aug 15 \$72,346 July/Aug 16 \$72,417 Sept/Oct 15 \$62,811 Sept/Oct 16 \$65,662 Year-over-year 2% increase	40%
Publish the bi-monthly magazine, with distribution the last week of the month prior to the posted issue dates	Both July/August & September/October magazines have been published & mailed	40%
Publish the annual visitors guide with the timeline that ensures distribution on or before Jan. 15 of each year	Visitor's Guide has a press date of December 22, 2016 and will be distributed by January 15, 2017	N/A
Sell 10% more advertising in the visitors guide year-over-year	Still working on Visitor Guide sales	N/A
Produce a digital version of the visitor's guide that is available to users of TravelNevada.com and NevadaMagazine.com as well as through online digital guides	Still working on the Visitor's Guide	N/A
Produce and distribute both the southern and northern versions of Events & Shows	Both July/August and September/October Events & Shows were published & distributed	40%
Create an advisory council that can help the magazine identify new revenue opportunities and provide editorial insights	No council formed	0%

## 2. Drive International Visitation

### Key Performance Indicators (KPIs)

KPI	Activity (per quarter)	Tracking to Goal
Conduct annual Mexico sales mission	Have plans in place for Mexico Sales Mission Nov. 28-Dec 3, 2016	
Identify and conduct a TravelNevada-sponsored sales mission to an international market (in addition to the Mexico mission)		
Conduct one group and up to 20 (qualified) individual press trips per year	French blogger (September); Australian journalists (September); Brazilian TV crew (September); Canadian group trip (September)	Group Trip: 100% Individual: 3/20
Develop an India activation plan ensuring input from instate market experts		
Track leads and distribute to the Territory chairs within one week of the end of the show or mission	<ul style="list-style-type: none"> <li>Leads from IFTM Top Resa will be distributed to the territory chairs.</li> <li>Vancouver Int'l Travel Show September 21-25, 2016. 65 leads were sent to Territory Chairs for distribution within one week of show.</li> </ul>	
Strive for 10% more leads year-over-year as a result of sales missions		
Host an instate familiarization trip at least once per quarter	<p>Hosting two pre-fams for the Global Tourism Summit for our international buyers and offices to attend. Both start in Las Vegas. One follows Hwy 93 and one follows Hwy 95 with them coming together for Lake Tahoe and Reno.</p> <ul style="list-style-type: none"> <li>July 5<sup>th</sup> – 10<sup>th</sup>, 2016: Hosted an India Sales FAM, the participants included premium travel agents looking to expand current itineraries or add new product. The FAM visited Lake Tahoe, Genoa, Reno, Virginia City and Las Vegas. All FAM participants were very impressed with being able to see new options outside of Las Vegas Strip, and will be looking to expand their outdoor adventure options.</li> </ul>	Completed.

	<ul style="list-style-type: none"> <li>Sept 27- Oct 1<sup>st</sup>, 2016: Brand USA/Delta Airlines will be holding a USA Specialist Mega FAM, Northern Nevada &amp; Lake Tahoe were selected to be part of the FAM. Brand USA Korea runs a yearlong US Specialist Program where 42 key travel agents become USA Specialist. From the group of 42 Brand USA and Delta Airlines select 24 agents to be part of the Mega FAM. The group will be visiting, Reno, Carson Valley, Virginia City &amp; Lake Tahoe</li> </ul>	<p>50%</p>
<p>Coordinate and conduct the Nevada Marketplace event at the annual Governor's Global Tourism Summit</p>	<p>Taking Place in October in Reno with 40 Buyers from Int'l and domestic markets. A total of 57 buyers will be participating at Governor's Global Tourism Summit. A total of 44 buyers will be part of a Pre FAM, the FAM will be starting in Las Vegas and end in Reno, NV. Buyers participating at Marketplace are from 12 different countries: Australia, Brazil, Canada, China, France, Germany, India, Mexico, New Zealand, South Korea, The Netherlands, and the United Kingdom.</p>	<p>Ongoing</p>
<p>Work with in-market representative firms to develop an annual market brief. Post on TravelNevada.biz</p>	<p>Quarterly reports have been submitted and posted by the United Kingdom office, the French office and the German office.</p>	
<p>Ensure quarterly reports provided by the international rep firms are posted on TravelNevada.biz</p>	<ul style="list-style-type: none"> <li>Met with TravelNevada France at the Aviareps office in Paris on 9/19/16.</li> <li>Met with TravelNevada Germany at the Aviareps office in Munich on 9/27/16.</li> <li>Visited Australia in coordination with the Governor's Economic Trade Mission.</li> <li>Visited China international office while on LVCVA Sales Mission in July.</li> </ul>	
<p>Visit each international office/market at least once per year to meet with the rep firms, the travel trade and media</p>	<p>September 21-23 TravelNevada attend IFTM Top Resa in Paris. This is the top travel show in France. TravelNevada joined forces with the LVCVA to meet with the top Tour Operators from all over the French market.</p>	
<p>Represent Nevada at major international trade shows including at least: IPW, World Travel Market (WTM) and ITB</p>	<p>In development. FY16 report will be completed in December 2016.</p>	
<p>Develop and distribute an annual report of activities, leads and results stemming from the international sales and marketing efforts</p>	<p>A new promotional brochure was developed specifically for the French speaking</p>	
<p>Ensure the Nevada brand is</p>		

<p>incorporated into all sales and marketing collateral distributed and used at meetings, trade shows and other promotional activities</p>	<p>market and it is brand compliant.</p>	<p>100%</p>
<p>Work with BrandUSA to ensure all programs are measureable and results are conveyed to partners/stakeholders on an annual basis</p>	<ul style="list-style-type: none"> <li>• August 2<sup>nd</sup> -5<sup>th</sup>, 2016: Brand USA Immersion Workshop, one on one meetings with multiple reps from Brand USA. Updates were given on the following segments: Travel Markets Research, Consumer &amp; Digital Marketing, Global Trade Development and Partner Programs. A strategic fiscal plan will be suggested subsequent from new updates and developments. In addition, we were able to obtain two complimentary advertorials in collaboration with Brand USA; one will be for Mexico and the other for Canada.</li> <li>• Aug 19 – 24<sup>th</sup>, 2016: UK Travel Network “Olly Ale Trails” – The show selected Nevada to be a part of their upcoming Ale Trail series. Nevada will be part of the show along with – Oregon, South Carolina, Georgia, &amp; Illinois. The show selected local breweries from the following cities in Nevada: Virginia City, Tonopah, Boulder City, Downtown Las Vegas &amp; Las Vegas Strip. Currently the show is schedule to air in the UK beginning of December</li> </ul>	



### 3. Boost Partnerships

#### Key Performance Indicators (KPIs)

KPI	Activity (per quarter)	Tracking to Goal
The number of partners participating in TravelNevada programs increases at least 5% year-over-year	Year-end calculation.	N/A
Partners participating in marketing programs integrate tracking mechanisms that show the ROI of these funds of at least 5:1	Yearend calculation.	N/A
TravelNevada.biz is developed into an industry portal	Work is underway to develop TravelNevada.biz into a robust industry portal. New site will be launched in 2 <sup>nd</sup> Quarter FY17 with ongoing development.	25%
TravelNevada offers at least quarterly online educational offerings – with all posted to TravelNevada.biz	No activity this quarter.	0%
Develop and distribute a bi-monthly industry-focused e-newsletter	Quarterly focus on GGTS – 7 emails sent	20%

4. Create and Convey Value

Key Performance Indicators (KPIs)

KPI	Activity (per quarter)	Tracking to Goal
Craft reputation management action plan on or before Jan 1, 2016, and executed as outlined	Q1 tasks completed	25%
Develop FY18-19 legislative sessions Tourism Means... plan. Execute as outlined	To be developed in Q2	
Develop and distribute a Commissioner-focused report each month	Top 10 on 10 distributed for July, August and September	25%
Develop and distribute an annual report	In development, for print in January	25%



5. Enhance Infrastructure

Key Performance Indicators (KPIs)

KPI	Activity (per quarter)	Tracking to Goal
Gain legislative approval for initiating rest area redevelopment - create initial design, including branding elements and visitor experience outline	Not in the FY16-17 Budget	N/A
Create a statewide air service development task force to address the business, policy and partnership issues pertaining to enhancing air service	Task force met in FY16. Further development TBD.	0%
Develop framework for identifying a lodging company to build state and national park lodges.	Not in the FY16-17 budget	N/A
Conduct entryway sign contest, produce and post new signs	Sign contest completed. Signs currently in development.	80%
Complete and launch the mobile app	Develop roadtrip portion; integration with website	

6. Run an Effective Business

Key Performance Indicators (KPIs)

KPI	Activity (per quarter)	Tracking to Goal
<p>All external vendors contracted in compliance with State Purchasing policies</p>	<p>New contracts completed:</p> <ul style="list-style-type: none"> <li>• Cherry Bomb Catering – Catering for post GGTS event at the Governor’s Mansion</li> </ul> <p>Contract amendments completed:</p> <ul style="list-style-type: none"> <li>• Madden Media - Contract extension for the cooperative marketing program</li> <li>• Fahlgren Mortine – Contract extension for the integrated marketing agency of record</li> <li>• Canuckiwi – Contract authority increase for the Jul/Aug sales mission to Australia</li> </ul> <p>Contract on November BOE (Expected):</p> <ul style="list-style-type: none"> <li>• Certified Folder – New contract to distribute Division of Tourism collateral materials</li> </ul> <p>Las Vegas office space - lease on November BOE (Expected):</p> <p>Upcoming Request for Proposals (RFP):</p> <ul style="list-style-type: none"> <li>• Call Center/Fulfillment/Postal Vendor</li> <li>• CRM/Database Management Vendor</li> <li>• Canadian International Rep Vendor</li> <li>• Web Usability Vendor</li> <li>• Ad Copy Testing Vendor</li> <li>• Off-site Storage Facility Vendor</li> </ul> <p>Upcoming Print Bid:</p> <ul style="list-style-type: none"> <li>• State Map - Printing</li> </ul> <p>All invoices completed as needed</p>	<p>25%</p>
<p>Invoice processing completed in alignment with contract and policies</p>	<p>All payments within budget</p>	<p>25%</p>
<p>Payment to vendors within agreed</p>	<p>All payments within budget</p>	<p>25%</p>

budget		
Agency operates within approved budget	All programs tracking within budget	25%
All-staff meetings held once per quarter	Due to budgets/closings, no Q1 all-staff meeting was held	0%
All staffers understand and comply with agency policies and procedures	Meetings with the marketing and PR teams to review P&P's will take place in November	33%



# Nevada Travel Economic Impacts Calendar Years 2015 - 2010



Question	2015	2014	2013	2012	2011	2010
1. What is the total overall travel spending in Nevada?	\$64.4B	\$62.5B	\$59.4B	\$57.5B	\$56.6B	\$51.5B
2. What is the total number of jobs attributed to the travel industry?	487,500	478,800	462,000	452,000	448,000	439,000
3. What percentage is this compared to all employment in the state?	29%	30%	30%	30%	30%	30%
4. What is the amount of state and local tax revenue generated by the travel industry?	\$3.2B	\$3.0B	\$2.9B	\$2.8B	\$2.8B	\$2.6B
5. How much state and local tax revenue is generated per Nevada household?	\$2,940	\$2,870	\$2,790	\$2,710	\$2,720	\$2,590
6. What percentage of state and local tax revenues are generated by the travel industry?	27%	27%	27%	27%	26%	25%
7. What is the amount of earnings attributable to the travel industry?	\$22.6B	\$21.8B	\$20.8B	\$20.2B	\$20.0B	\$18.8B
8. In terms of GDP, what is the largest export industry in Nevada?	Travel	Travel	Travel	Travel	Travel	Travel
9. What is the direct gross domestic product (GDP) of the Nevada travel industry?	\$18.5B	\$17.8B	\$17.0B	\$16.5B	\$16.3B	\$15.4B
10. What percentage of the overall Nevada GDP is attributable to the travel industry?	13.1%	13.1%	13.3%	13.2%	13.3%	12.9%
11. What percentage of the overall U.S. GDP is attributable to the travel industry?	2.7%	2.7%	2.6%	2.6%	2.6%	2.5%

Q6 percentages are for fiscal year.

Q1, 2, 3, & 7 refer to total impact

Q4, 5, 6, 8, 9, 10 & 11 refer to direct impact only.

Direct impact refers to the spending and related impact made directly by visitors at businesses throughout the state.

Total impact includes indirect and induced spending by businesses and employees that receive direct visitor expenditures.

