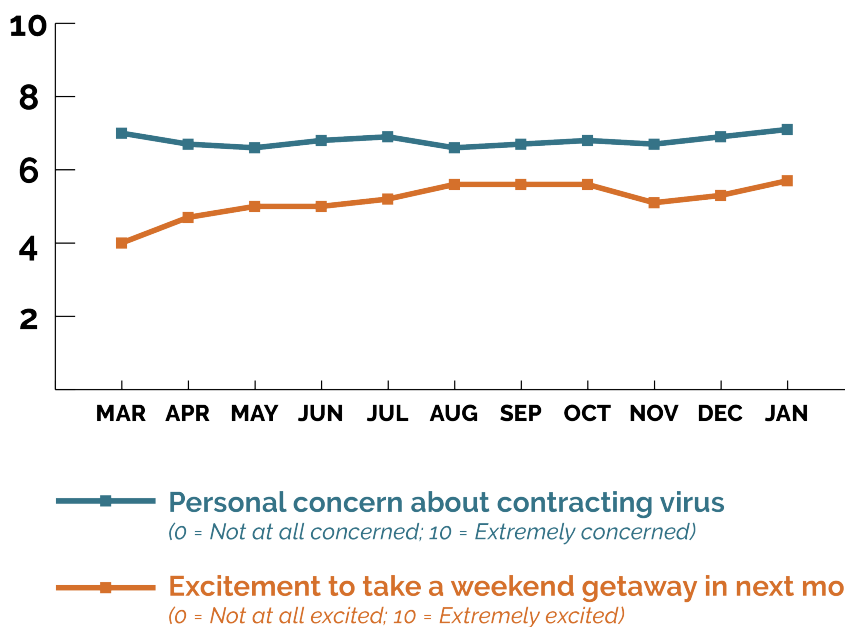


Nationwide, what is the current intent to consider or plan travel?

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

TRAVEL SENTIMENT

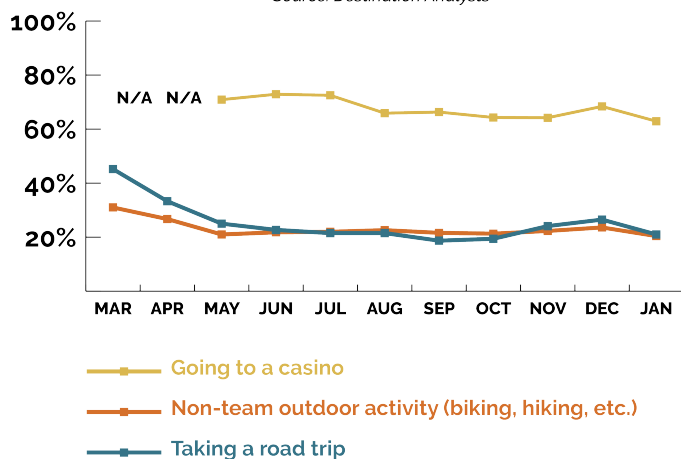
Source: Destination Analysts



TRAVEL ACTIVITIES

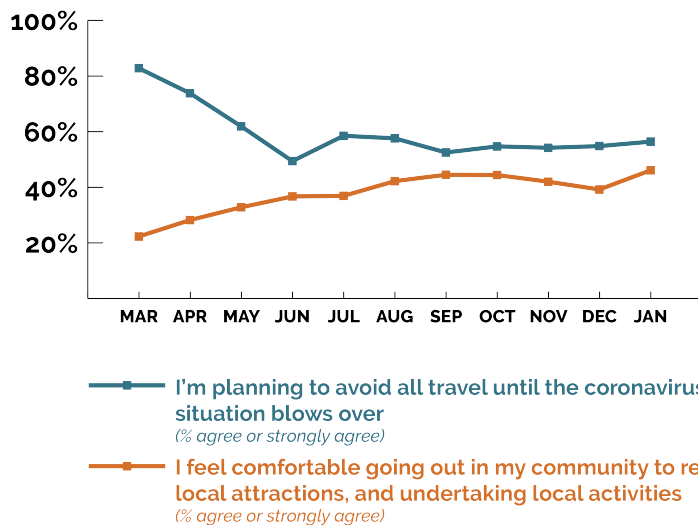
At this moment, how safe would you feel doing each type of travel activity (% somewhat unsafe or very unsafe)

Source: Destination Analysts



TRAVEL CONFIDENCE

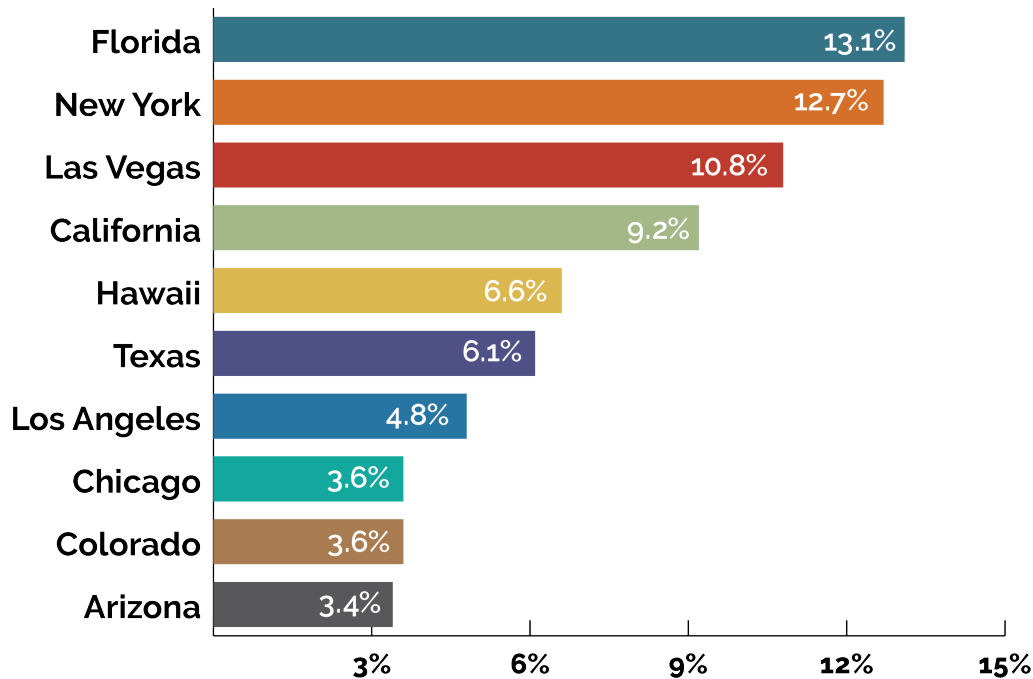
Source: Destination Analysts



DESIRED DESTINATIONS

Which domestic destinations do you want to visit this upcoming year?

Source: Destination Analysts



Takeaways

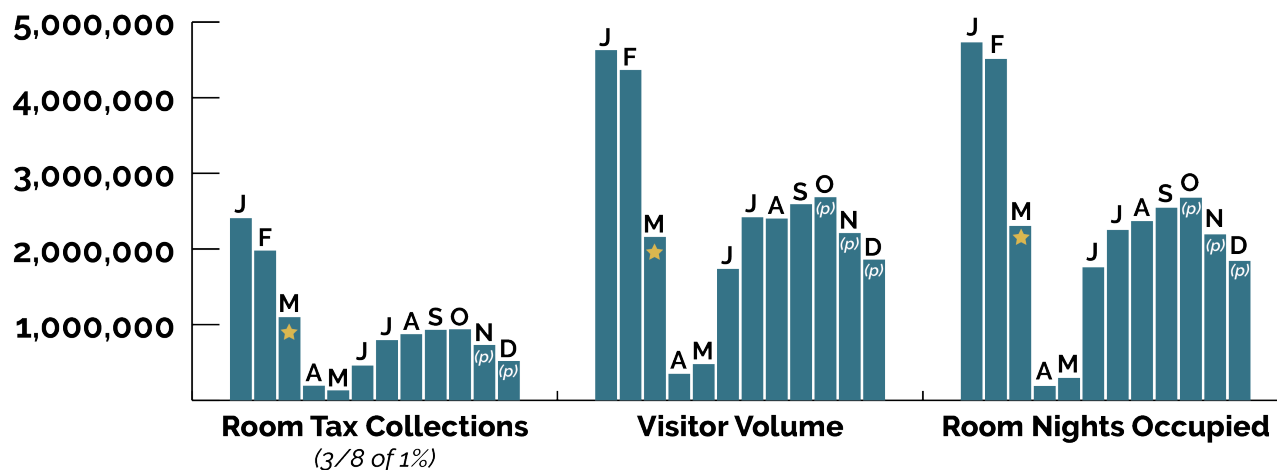
- Concern about contracting the virus has remained a steady constant in how consumers feel about traveling.
- Excitement about travel is proportionally tethered to consumers' concerns, and has remained steady, with some positive direction very recently.
- Confidence in going out into the community is beginning to rise, suggesting that consumers are looking to move around more freely as restrictions and safety considerations allow.
- While indoor activities like casinos are perceived as riskier, as the vaccinations come online, they are starting to be perceived as slightly safer. Activities that are easy to access in Nevada like outdoor recreation and taking a road trip continue to be perceived as the safest.
- As consumers consider future travel, Las Vegas is top of mind.

Statewide, how are visitor statistics and health metrics performing?

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

MONTHLY REPORT DATA

January thru December 2020



Room tax collections (directly impacts our budget)

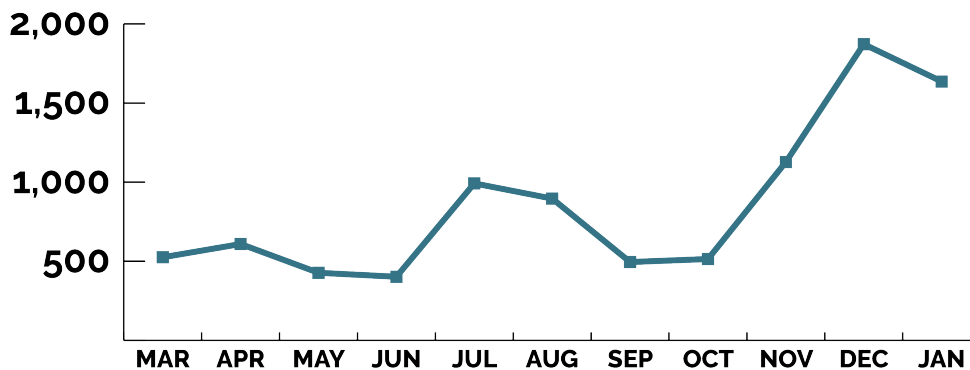
Visitor volume (economic impact)

Room nights occupied (percentage of total inventory)

NEVADA COVID HOSPITALIZATIONS

Daily Average

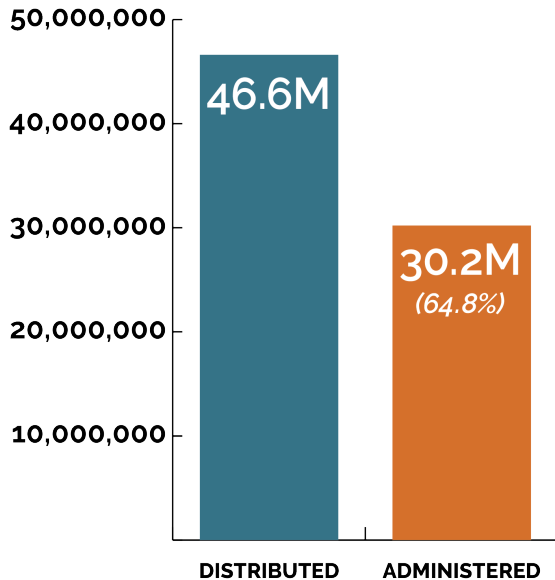
Source: Nevada HHS



TOTAL VACCINATIONS IN U.S.

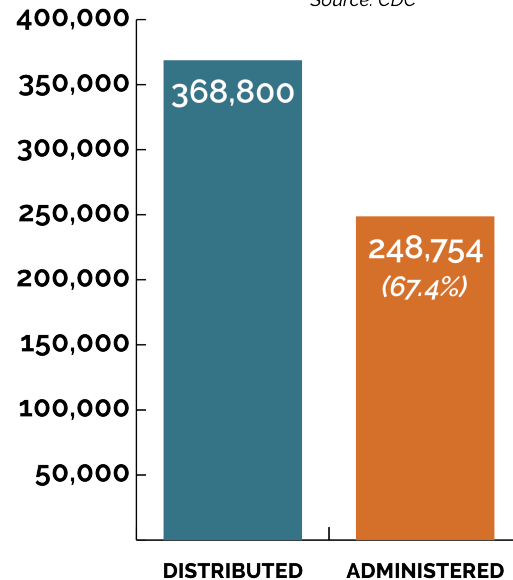
U.S. includes all 50 states and D.C.

Source: CDC



TOTAL VACCINATIONS IN NEVADA

Source: CDC



Nevada's rank for % of shots administered
(out of all 50 states plus D.C)

22

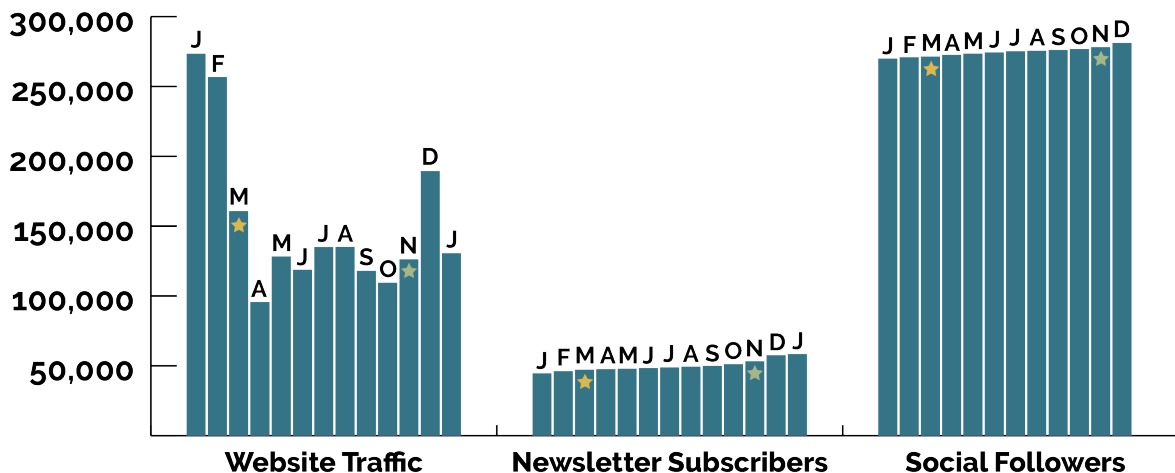
Takeaways

- The economic effects of COVID-19 continue to be greatly impacted by the physical health of our residents and visitors. While hospitalizations have been a strong indicator as to visitation trends, vaccinations will be a positive indicator moving forward.
- Nevada COVID-19 hospitalizations have been tethered to state restrictions and the ability and desire for consumers to travel safely.
- As hospitalizations increase, so do restrictions, and subsequently, we have seen a drop in room nights, visitor volume and room tax collections.
- As the vaccine rollout continues, we hope to see progressive improvement across COVID-19 health metrics along with visitation statistics.

How are consumers engaging with Travel Nevada?

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

JAN 2020-JAN 2021

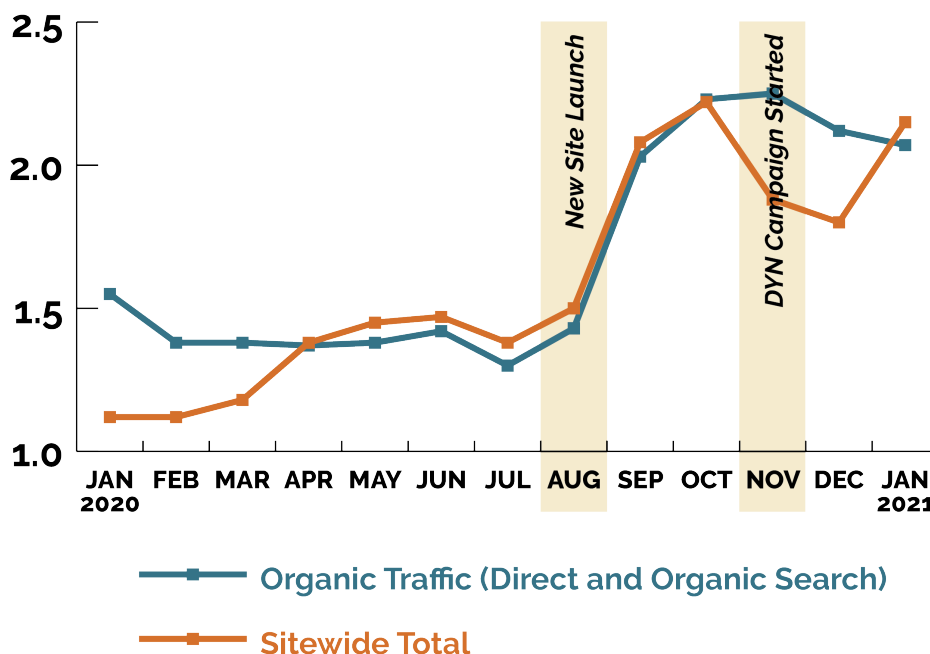


★ Full paid media paused in March

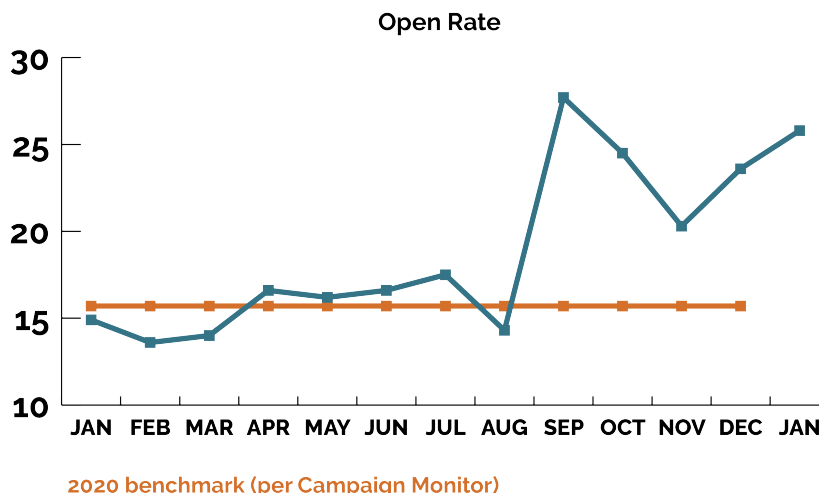
★ In-State (DYN) paid media resumed in November

WEBSITE ENGAGEMENT

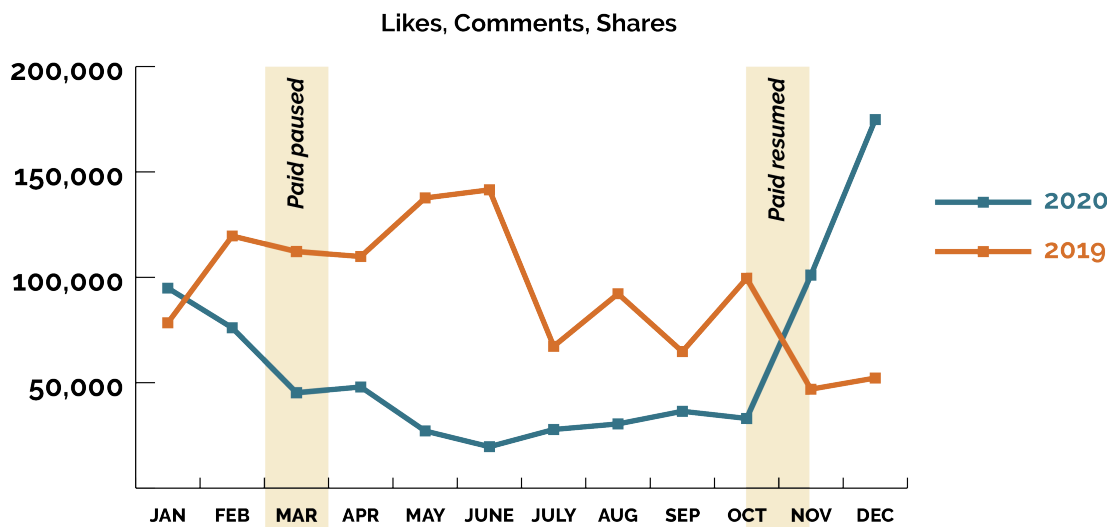
Average Session Duration in Minutes



EMAIL ENGAGEMENT



SOCIAL ENGAGEMENT



Takeaways

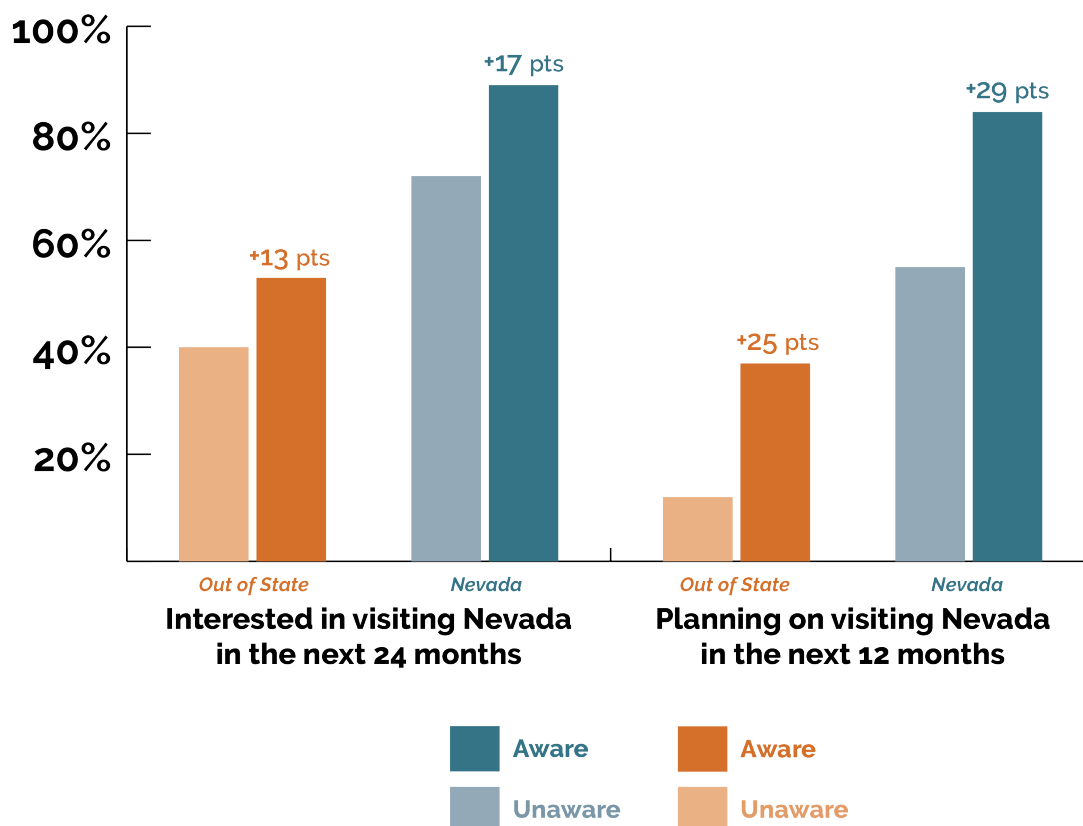
- While these performance measures can reflect organic efforts, smaller budgets will impact the most high-level data, so we will be looking at monthly and quarterly growth as well as engagement.
- When paid efforts increase, although site traffic increases, time on site tends to decline. However, average session duration has remained elevated after the launch of the new Travel Nevada site, even once paid efforts resumed in November.
- Our email audience has continued to engage well with our content, performing well above benchmark levels.
- The social media space was challenging to navigate in 2020, as we were not only impacted by a global pandemic, but the volatile socio-political environment. When paid efforts did resume (October/November), more people could be reached, resulting in better engagement.

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

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

INTEREST IN FUTURE TRAVEL Q1–FY21

Source: OmniTrak Group



Takeaways

- Even with little to no spending in Q1, those who were aware of any efforts (including owned and earned), were still more likely to consider Nevada as a travel destination.
- The impact was greater among Nevada residents than out-of-state residents.
- Future iterations of this report will include information on brand perception, incremental spending increases, and other impressions we can affect based on our efforts.

State of the State

Monthly Report Data

METRIC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Room Tax Collections	\$2.41 M	\$1.98 M	\$1.10 M	\$0.19 M	\$0.13 M	\$0.46 M	\$0.80 M	\$0.87 M	\$0.93 M	\$0.94 M	\$0.73 M (p)	\$0.52 M (p)
Visitor Volume	4.63 M	4.37 M	2.16 M	0.35 M	0.48 M	1.74 M	2.42 M	2.41 M	2.59 M	2.68 M (p)	2.21 M (p)	1.86 M (p)
Room Nights Occupied	4.73 M	4.51 M	2.31 M	0.19 M	0.30 M	1.76 M	2.25 M	2.37 M	2.55 M	2.68 M (p)	2.19 M (p)	1.84 M (p)

NV COVID

Hospitalizations

(daily average)

Source: Nevada DHHS

MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN
525	609	427	402	992	896	495	514	1,127	1,872	1,636

Vaccinations

(as of 2/1/2021)

Source: CDC

METRIC	TOTAL VACCINES DISTRIBUTED	TOTAL VACCINES ADMINISTERED	ADMINISTERED %	RANK
U.S. (50 states and D.C)	46.6M	30.2M	64.8%	N/A
Nevada	0.37M	0.25M	67.4%	22

State of the Industry

Source: Destination Analysis

Travel Sentiment

Personal concern about contracting virus

(0 = Not at all concerned; 10 = Extremely concerned)

MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN
7.0	6.7	6.6	6.8	6.9	6.6	6.7	6.8	6.7	6.9	7.1

Excitement to take a weekend getaway in next month

(0 = Not at all excited; 10 = Extremely excited)

4.0	4.7	5.0	5.0	5.2	5.6	5.6	5.6	5.1	5.3	5.7
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Travel Confidence

I'm planning to avoid all travel until the coronavirus situation blows over

(% agree or strongly agree)

82.8%	73.8%	61.9%	49.4%	56.5%	57.6%	52.5%	54.7%	54.2%	54.8%	56.4%
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I feel comfortable going out in my community

(% agree or strongly agree)

22.3%	28.2%	32.8%	36.7%	36.9%	42.2%	44.5%	44.4%	42.0%	39.2%	46.1%
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Travel Activities

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

Going to a casino

N/A	N/A	70.9%	72.9%	72.5%	65.9%	66.3%	64.3%	64.2%	68.4%	62.9%
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Non-team outdoor activity (biking, hiking, etc.)

31.5%	26.7%	21.0%	21.8%	22.0%	22.6%	21.6%	21.3%	22.3%	23.6%	20.4%
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Taking a road trip

45.2%	33.3%	25.0%	22.7%	21.5%	21.5%	18.7%	19.4%	24.1%	26.5%	21.0%
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State of the Travel Nevada

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

273,513	256,822	160,738	95,674	128,283	118,770	135,069	135,178	118,051	109,537	126,191	189,441	130,556
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Avg Session Duration Overall

1.12	1.12	1.18	1.38	1.45	1.47	1.38	1.50	2.08	2.22	1.88	1.80	2.15
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Avg Session Duration Direct/ Organic

1.55	1.38	1.38	1.37	1.38	1.42	1.30	1.43	2.03	2.23	2.25	2.12	2.07
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Newsletter Subscribers

44,559	46,091	47,184	47,527	47,981	48,393	48,882	49,495	49,985	51,117	53,224	57,500	58,373
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Email Open Rate

14.9%	13.6%	14.0%	16.6%	16.2%	16.6%	17.5%	14.3%	27.7%	24.5%	20.3%	23.6%	25.8%
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Social Followers

270,021	270,915	271,468	272,728	273,620	274,408	275,175	275,650	276,195	276,829	278,142	281,246	
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Social Engagement

2019

78,414	119,596	112,236	109,861	137,637	141,502	67,286	92,198	64,738	99,516	46,932	52,226	
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2020

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

Source: OmniTrak Group

Interest in future travel Q1-FY21

Nevada Residents

METRIC	UNAWARE	AWARE
Interested in visiting Nevada in next 24 months	72%	89%
Planning on visiting Nevada in next 12 months	55%	84%

Out-of-state Residents

METRIC	UNAWARE	AWARE
Interested in visiting Nevada in next 24 months	40%	53%
Planning on visiting Nevada in next 12 months	22%	37%