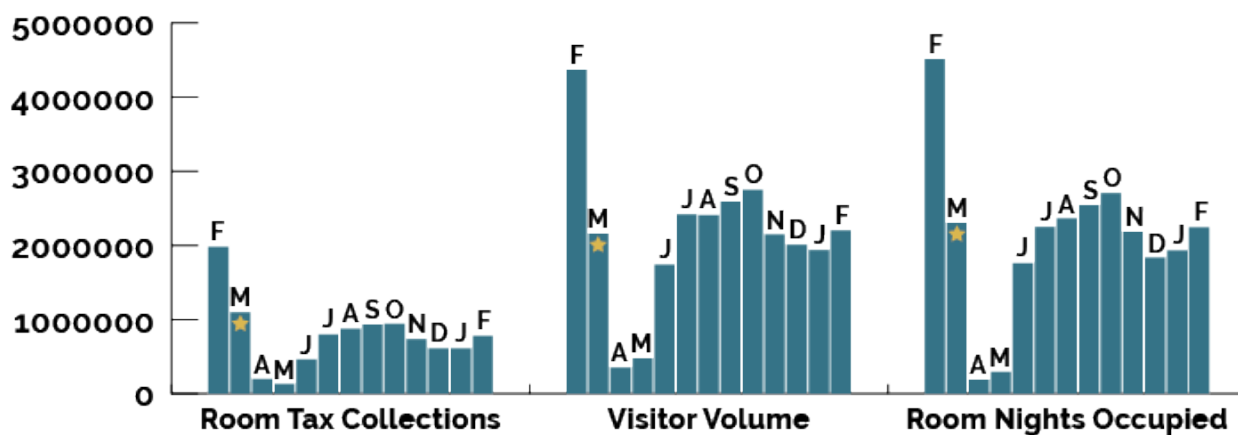


Statewide, how are visitor statistics and health metrics performing?

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

February 2020 thru February 2021



Room tax collections (directly impacts our budget)

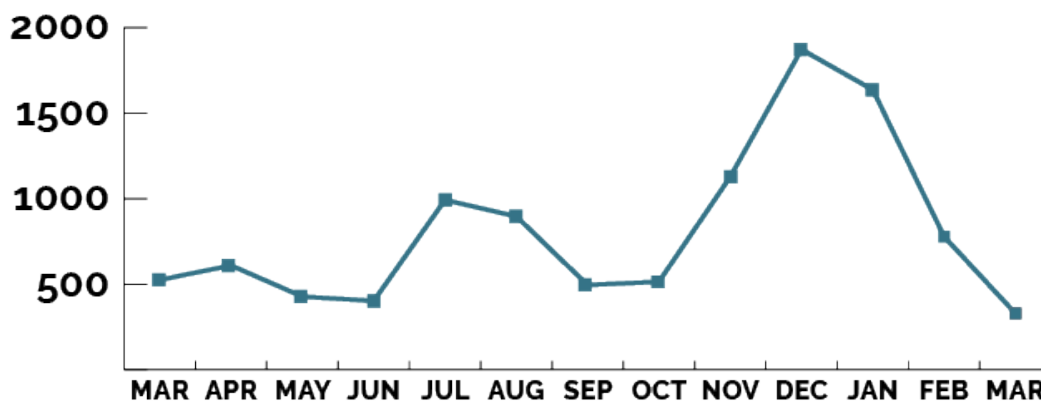
Visitor volume (economic impact)

Room nights occupied (percentage of total inventory)

NEVADA COVID HOSPITALIZATIONS

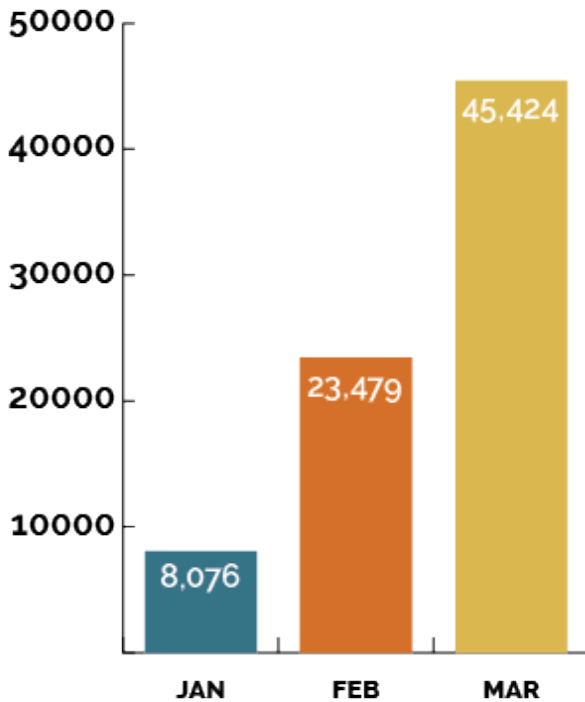
Daily Average March 2020 thru March 2021

Source: Nevada HHS



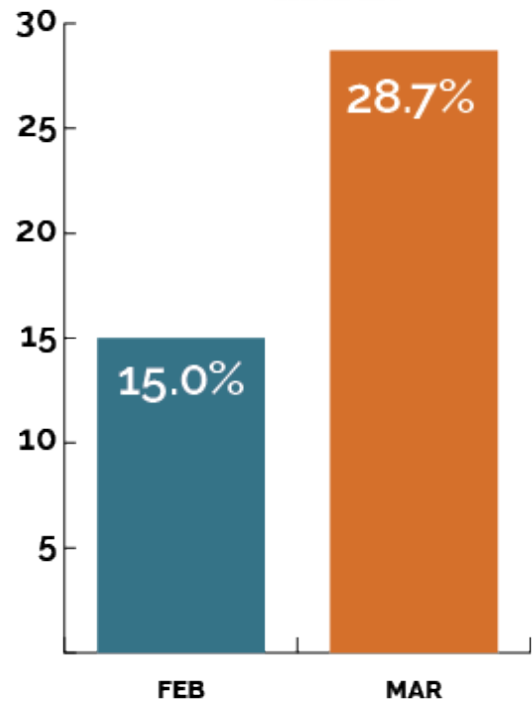
VACCINATIONS PER 100K

Source: CDC



PERCENT OF NV POPULATION WITH AT LEAST 1 DOSE

Source: CDC



Takeaways

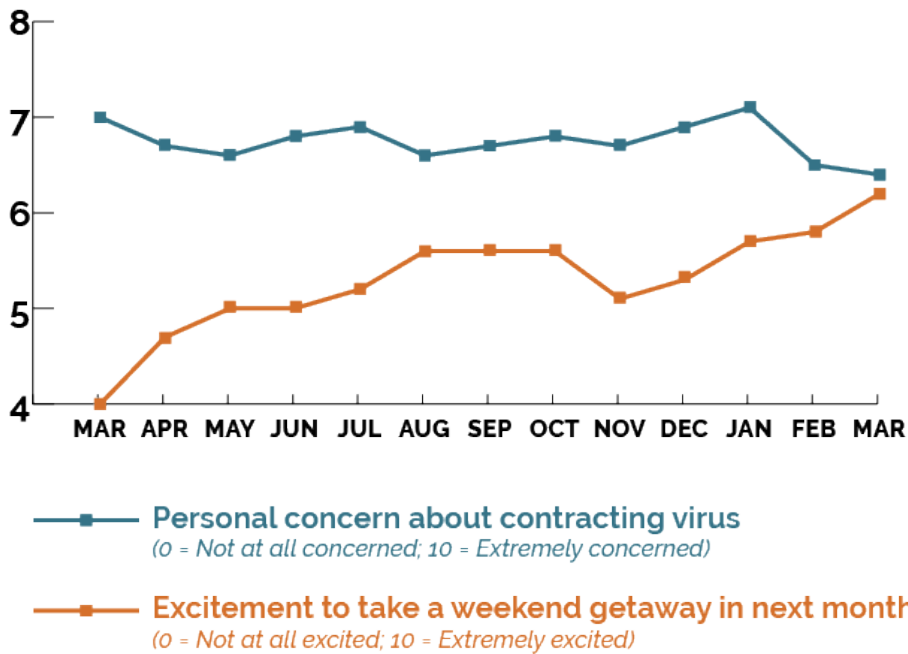
- The economic effects of COVID-19 continue to be greatly impacted by the physical health of our residents and visitors. While hospitalizations have been a strong indicator as to visitation trends, vaccinations will be a positive indicator moving forward.
- Nevada COVID-19 hospitalizations have been tethered to state restrictions and the ability and desire for consumers to travel safely. With the rollout of vaccines, hospitalizations in the state have fallen dramatically and the daily average hospitalizations were lower in March 2021 than March 2020.
- As hospitalizations increase, so do restrictions, and subsequently, we have seen a drop in room nights, visitor volume and room tax collections. However, these trends have started to reverse at the turn of the year as the COVID health metrics have improved.
- As the vaccine rollout continues, we hope to see progressive improvement across COVID-19 health metrics along with visitation statistics.

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

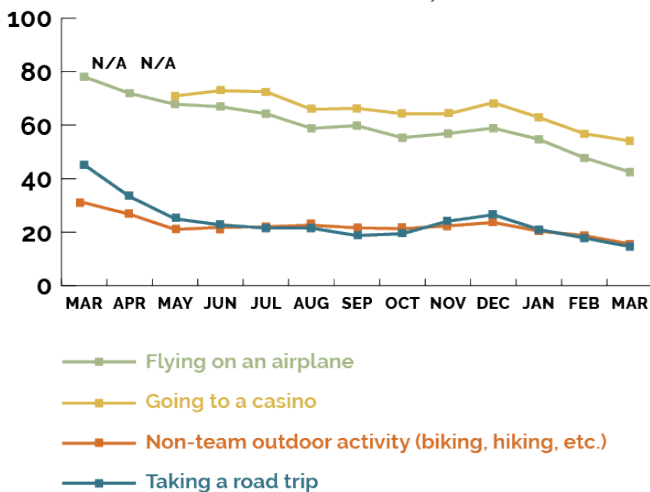
Source: Destination Analysts



TRAVEL ACTIVITIES

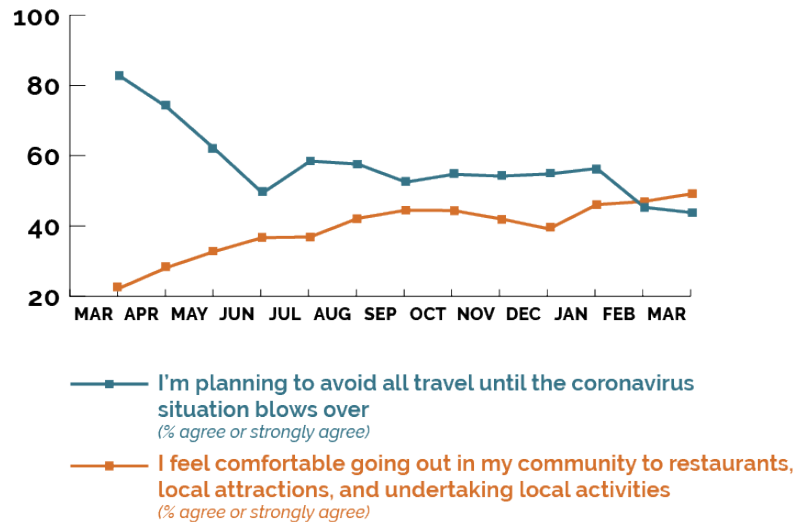
At this moment, how safe would you feel doing each type of travel activity (% somewhat unsafe or very unsafe)

Source: Destination Analysts



TRAVEL CONFIDENCE

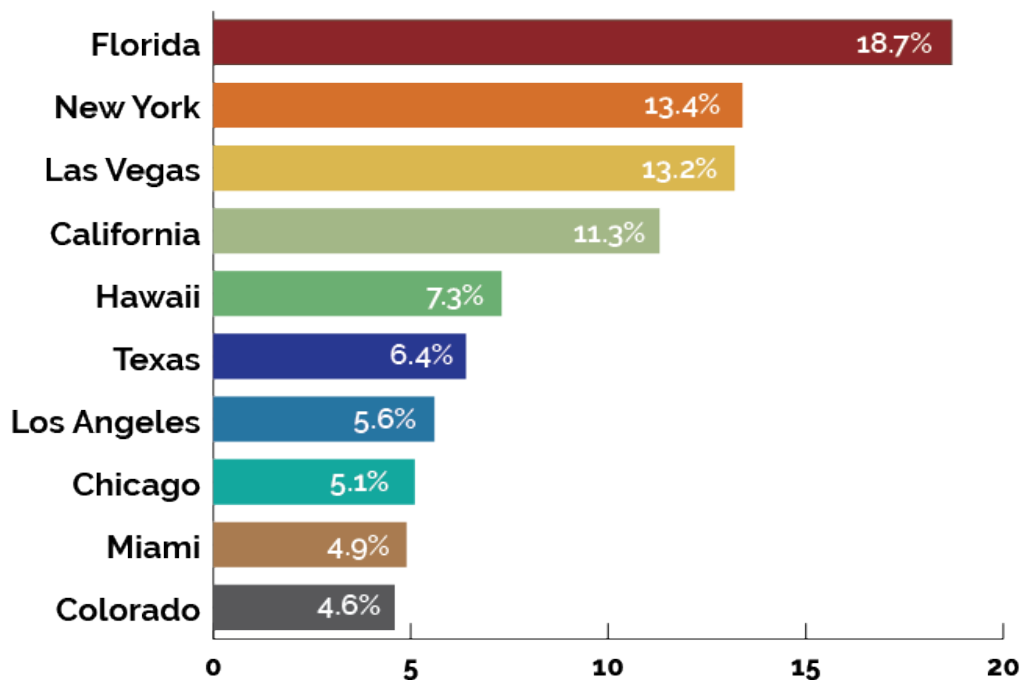
Source: Destination Analysts



DESIRED DESTINATIONS

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

Source: Destination Analysts



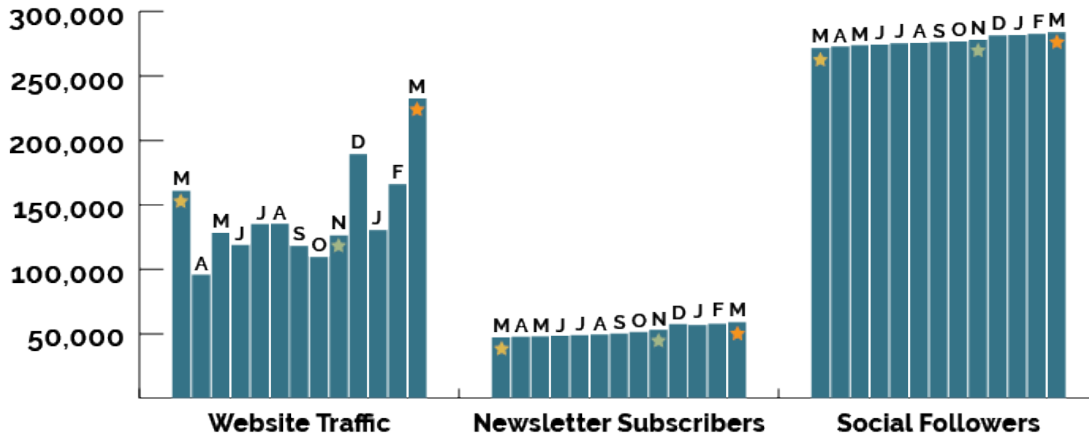
Takeaways

- Though excitement to travel dipped a bit in the Fall, this has been on an upward trajectory since November.
- By the end of Q3, almost half of respondents (46.9%) said that they agreed/strongly agreed that they will put more effort into visiting places on their bucket over the next few years as a result of the pandemic, .
- While indoor activities like casinos are perceived as riskier, as the vaccinations continue to be distributed and case levels remain low, 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 activities surveyed.
- 70% of recent respondents are in a ready-to-travel state of mind and 2/3 say they are highly open to travel inspiration. In the last week, over 75% have actively dreamt and/or planned travel, including the nearly 18% who made a booking or reservation for an upcoming trip.
- Las Vegas continues to be toward the top of desired destinations to visit in the coming year.

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.

MAR 2020-MAR 2021

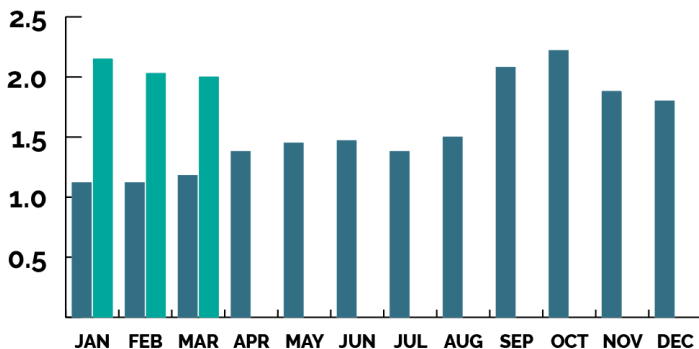


- ★ Full paid media paused in March 2020
- ★ In-State (DYN) paid media resumed in November 2020
- ★ Full paid media resumed in March 2021

WEBSITE ENGAGEMENT

Sitewide Total Average Session Duration

In Minutes



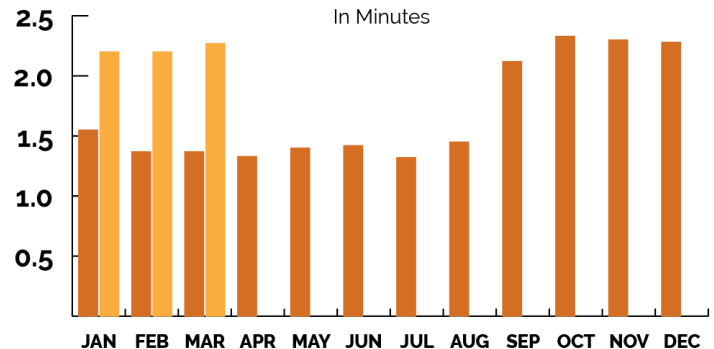
2021
 2020

WEBSITE ENGAGEMENT

Organic Traffic (Direct & Organic Search)

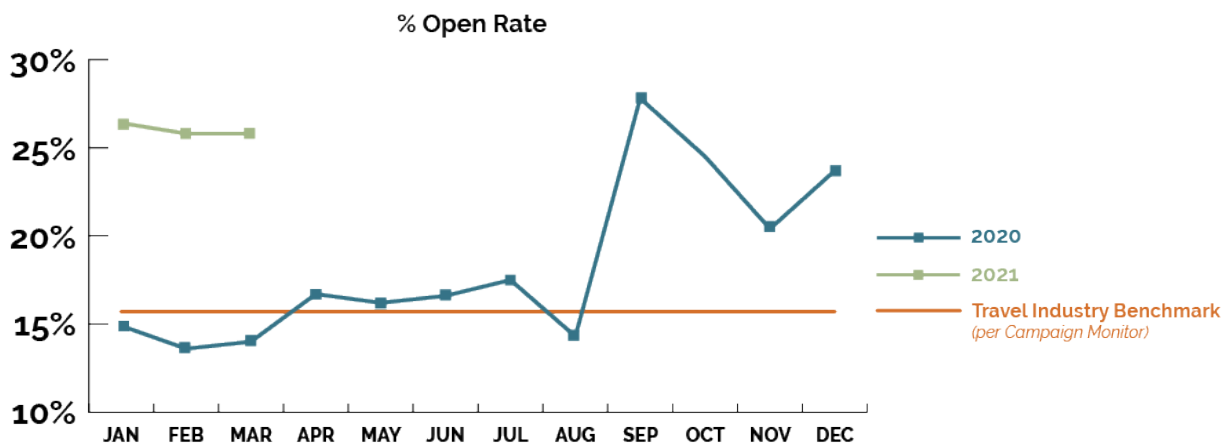
Average Session Duration

In Minutes

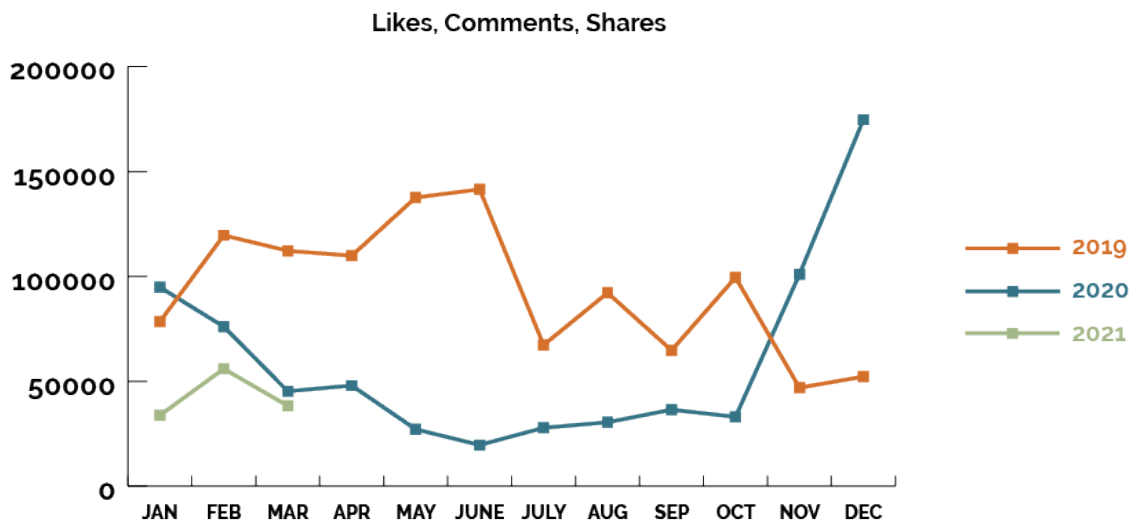


2021
 2020

EMAIL ENGAGEMENT



SOCIAL ENGAGEMENT



Takeaways

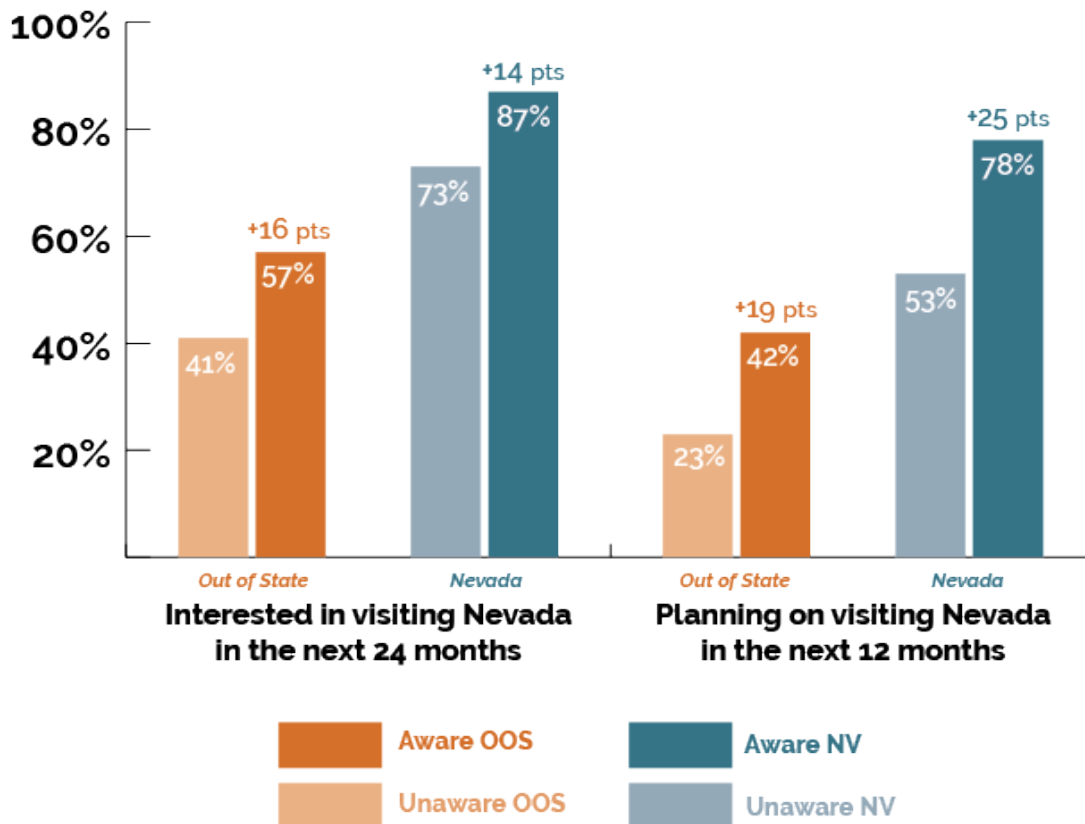
- While these performance measures can reflect organic efforts, smaller budgets will impact the most high-level data, so we will be looking at monthly and quarterly growth as well as engagement.
- When paid efforts increase, although site traffic increases, time on site tends to decline. However, average 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-Q2 FY21

Source: OmniTrak Group



Takeaways

- Even with lower spending in the first half of FY21, those who were aware of any efforts (including owned and earned), were still more likely to consider Nevada as a travel destination.
- Even though Nevada residents tend to have higher trip planning and trip intent than out of state residents normally, those who were aware still saw strong gains in these categories.
- 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	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB
Room Tax Collections	\$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	\$0.74 M	\$0.61 M	\$0.61 M	\$0.78 M (p)
Visitor Volume	4.37M	2.16M	0.35 M	0.48 M	1.74 M	2.42M	2.41M	2.59 M	2.75M	2.15M	2.01 M	1.94M (p)	2.20 M (p)
Room Nights Occupied	4.51M	2.31M	0.19 M	0.30 M	1.76 M	2.25M	2.36M	2.54 M	2.71M	2.19M	1.83 M	1.93M	2.24M

NV COVID

Hospitalizations

(Daily Average)
Source: Nevada DHHS

	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR
	525	609	427	402	992	896	495	514	1,127	1,872	1,636	778	329

Vaccinations

Source: CDC

METRIC	JAN	FEB	MAR
Total Vaccines in NV Administered per 100k	8,076	23,479	45,424
% of Population with at least 1 Doses	N/A	15.0%	28.7%

State of the Industry

Source: Destination Analysis

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

Personal concern about contracting virus (0 = Not at all concerned; 10 = Extremely concerned)

7.0	6.7	6.6	6.8	6.9	6.6	6.7	6.8	6.7	6.9	7.1	6.5	6.4
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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	5.8	6.2
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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%	58.5%	57.6%	52.5%	54.7%	54.2%	54.8%	56.4%	45.3%	43.8%
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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%	47.0%	49.2%
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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%	56.8%	54.1%
Traveling on a commercial airline	78.1%	71.9%	67.8%	66.9%	64.3%	58.8%	59.8%	55.3%	56.9%	58.9%	54.7%	47.8%	42.5%
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%	18.7%	15.6%
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%	17.8%	14.6%

State of the Travel Nevada

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

160,738	95,674	128,283	118,770	135,069	135,178	118,051	109,537	126,191	189,441	130,556	166,136	232,476
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Newsletter Subscribers

45,888	46,326	46,756	47,151	47,619	48,199	48,675	49,770	51,830	55,977	56,811	57,730	59,025
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Social Followers

271,468	272,728	273,620	274,408	275,175	275,650	276,195	276,829	278,142	281,246	281,928	282,671	283,730
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JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
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Avg Session Duration Direct/ Organic Traffic (in minutes)

1.53	1.37	1.37	1.33	1.40	1.42	1.32	1.45	2.12	2.33	2.30	2.28
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2021

2.20	2.20	2.27									
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Avg Session Duration Overall Traffic (in minutes)

1.12	1.12	1.18	1.38	1.45	1.47	1.38	1.50	2.08	2.22	1.88	1.80
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2021

2.15	2.03	2.00									
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Email Open Rate

2020

14.9%	13.6%	14.0%	16.7%	16.2%	16.6%	17.5%	14.3%	27.8%	24.5%	20.4%	23.7%
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2021

26.4%	25.8%	25.8%									
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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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2021

33,757	55,942	38,306									
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State of Awareness

Source: OmniTrak Group

Interest in future travel Q1-Q2 FY21

Out-of-state Residents

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

Nevada Residents

METRIC	UNAWARE	AWARE
Interested in visiting Nevada in next 24 months	73%	87%
Planning on visiting Nevada in next 12 months	53%	78%