JEVADA

TRAVEL NEVADA Marketing Committee



June 9, 2021



"...A decade worth of disruption and growth in nine months"

Scott Galloway



- Travelers want bold experiences, especially outdoor recreation, more than ever (Longwoods International April 2021)
- 89% of Americans reveal they intend to be more spontaneous than ever in 2021 (Hotels.com February 2021)
- Most domestic travelers' first trips post-pandemic will be via car. (Skift August 2020)

• With shorter planning windows, access to Nevada and affinity for the destination are especially important in returning to pre-pandemic travel levels.



- Market disruption presents opportunities in new and emerging markets as well as in creative messaging to our target audiences
- Through multiple sources, we are able to evaluate data regarding accessibility, arrivals, perception, interest, and intent to visit Nevada
- Taking a step back, we can see where Nevada may fill in white space through unique offerings and attitude
- Recommendations will include creative evolution and media approach for FY22



- MISSION: Effectively communicate the enriching travel experiences Nevada offers and promote statewide economic health through Tourism.
- VISION: Enhance the quality of life for all Nevadans.
- OUR STRATEGY: Every marketing touchpoint must convince our core traveler segments that Nevada is <u>THE</u> perfect place for their next unforgettable adventure, complete with the kind of transformative experiences and memories that can only be found here.
- SIMPLY PUT: We want to be top of our travelers' consideration set, to spend more, and stay longer.

5 | 09 | 21

Travel Nevada Creative Strategy Audit & Direction



Positioning Background

BVK

BRAND OVERVIEW

MANTRA

OUT THERE. IN THE SO-CALLED REAL WORLD. WE'RE PUT INTO BOXES. CONFINED. CONFORMED. HELD BACK BY EXPECTATIONS. TRYING TO MOLD. FOLD. BEND. AND BREAK US. WELL, NOT HERE. NOT EVER. THIS IS THE WEIRDEST, WILDEST WEST. WHEN THE IN-CROWDS AND YES-MEN TRY TO PUSH YOU DOWN, WE SAY PUSH BACK. JUST GO. DO. BE. HEED THE URGE TO LIVE OUTSIDE THE LINES. UNDAUNTED. AND UNINHIBITED. WE WON'T TELL YOU TO TURN IT DOWN. OR BUTTON IT UP. AND WE SURE AS HELL WON'T FENCE YOU IN. THAT'S THE BEAUTY OF FREEDOM. THAT'S THE POWER OF NEVADA.

BRAND PLATFORM

Freedom

BRAND PILLARS

- Uninhibited Space
- Inspiring Discoveries •
- **Rewarding Adventures** •
- **Unexpected Diversity** \bullet

- **Unbridled Independence**
- CORE VALUE AND CRAVING

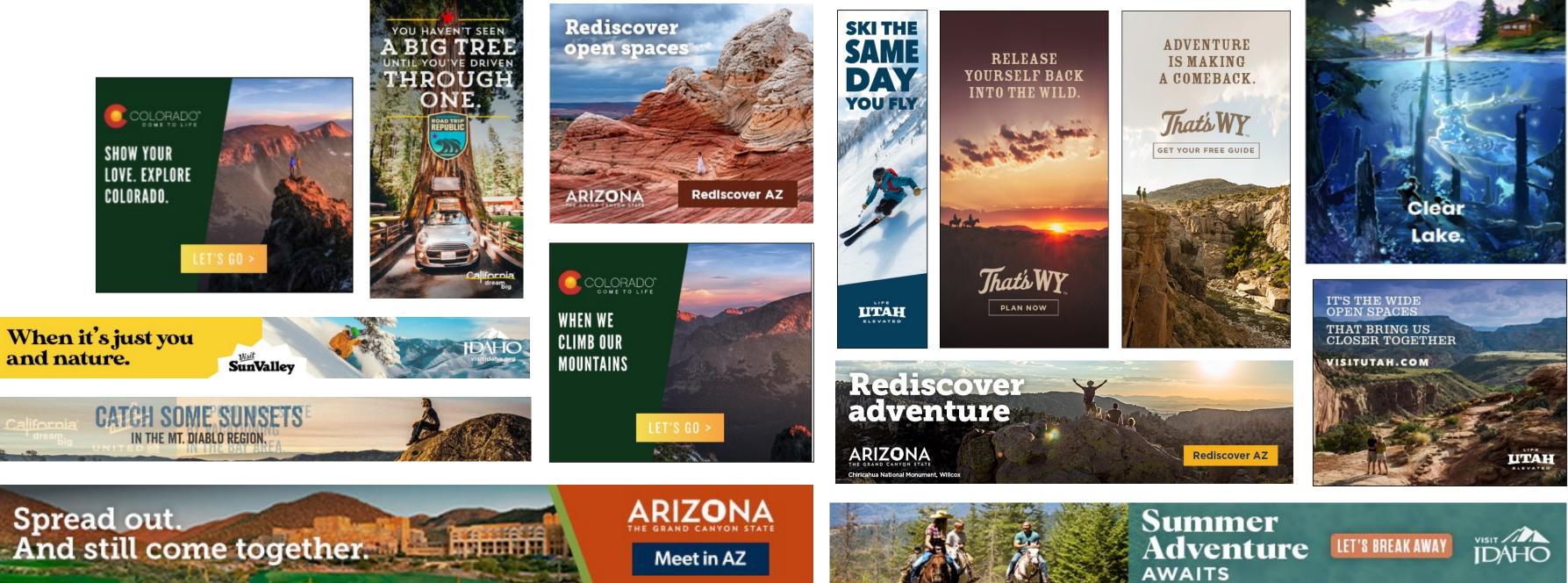
- **BRAND POSITIONING STATEMENT**
- Nevada inspires a sense of freedom and release that
- makes all things seem possible.

What We Found

BVK

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OUTDOOR OVERLAP



SUMMARY

COMPETITIVE BRAND PILLARS

	CALIFORNIA	IDAHO	ARIZONA	OREGON	COLORADO	UTAH	WYOMING
Outdoors / Space	X	Х	Х	Х	Х	Х	X
Culinary / Food & Drink	X		Х	X			
Unreal Experiences / Surprises				X		X	X
Culture	X						
Family / Connections / People	X	X					
Luxury	Х		X				
Recreation / Adventure		X			X	X	X
Accommodations			X				
Localism	X				X		
Abundance / Endless						X	
Ease						X	

AUDIENCE OVERVIEW

AUDIENCE

BRAND PILLAR **ALIGNMENT**

- TARGET AUDIENCE 1 Cultural Traveler History art food. The cultural traveler craves rich fulfilling travel experiences that lead to stories of their own after they leave the Silver State. Those avorite part of traveling is talking to an idents and learning about their culture These people want to immerse themselves in authentic activities and ways of life in their vacation destination.
 - Unexpected Diversity

- **Rewarding Adventures** •
- Uninhibited Space

GAPS AND **OPPORTUNITIES**

- Unique Local Cuisine
- Connecting with Locals \bullet
- Arts / Culture

- Other Recreation: Water sports, • Skiing / Snowboarding, Rockclimbing
- Photography / Scenery •



- Uninhibited Space
- Inspiring Discoveries

- Only in Nevada Experiences (Weird Nevada, Extraterrestrial, Ghost Towns, Hot Springs, etc.)
- Unique Places to Stay •

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PILLAR OVERVIEW

PILLAR

Uninhibited Space

Maverick Spirit | Anything Goes Attitude | Wide-Open Horizons

creative to include ads that

could appease this.

Inspiring Discoveries

DNA of Discovery | Undiscovered Beauty | Hidden Treasures

Rewarding Adventure

Nearly all competitors are Discovery messaging is present **OBSERVATIONS** • • messaging here emphasizing among about half of competitors outdoors and wide-open Appeals most to Uncharted connection Experiences Junkie, and spaces Most effectively reaches the Cultural Traveler Aligns with Betterment trend **Experience Junkie and** degrees **Outdoor Recreationalist** • Opportunity to lean into the • A barrier to Nevada visitation is maverick spirit aspect of this the desire to go somewhere new. pillar with a tone unique to This pillar could be leveraged to GAPS AND Nevada, differentiating from the encourage in-state and return **OPPORTUNITIES** warm / friendly tone seen visitation to discover new places within Nevada. commonly across competitors attribute • COVID-19 concerns remain a top barrier to Nevada travel, opportunity to expand existing

Active Adventures | Offbeat Journeys | Remarkable Road Trips

Unexpected Diversity

Abundant Diversity | Unique Landscapes | Eclectic Experiences

- Aligns with trends of spontaneous experiences, and family
- Most competitors include
- adventure messaging to varying
- Reaches Outdoor Recreationalist

- Appeals most to Cultural Traveler Audience
- Aligns with trends of localism and betterment

- While "variety of things to do" is a strength of Nevada's, it currently ranks lower than competitors for "outdoor adventure" with
- Colorado as top of mind for this
- Growth opportunity to reach an under-tapped family audience
- Opportunity space among competitive set with CA being one of the only competitors messaging here.
- Nevada currently under scores on perception of unique local culture and dining, both attributes valued by travelers

What We Recommend

BVK

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FREEDOM has many dimensions that can be explored with each campaign.

- **Escape:** Freedom from the mundanity or pressures of everyday life. \bullet
- **Maverick Spirit:** Freedom from the status-quo, authority, expectations. \bullet
- **Self-Discovery:** Freedom to be one's truest self, unrestricted by societal pressures. \bullet
- **Space:** Feeling free of physical confinement, access to wide open space, outdoors, expansive landscapes. \bullet

SUMMARY

UNUSUAL EXPERIENCES / INSPIRING LOCAL CULTURE / TRANSFORMATIVE C

While all tenets of Freedom are inherent in the brand, Travel Nevada has an opportunity to lean into Self-Discovery with the upcoming campaign while leveraging its distinctive edge that stays true to Nevada's maverick spirit.



CAMPAIGN PLANNING / CONTENT DEVELOPMENT

BRAND POSITIONING	Freedom: Nevada inspires a sense of freedom and release that makes all things seem possible.			
CAMPAIGN STRATEGY		FREEDOM OF SELF DISCOVERY		
CONTENT BUCKETS	UNUSUAL EXPERIENCES	INSPIRING CULTURE	TRANSFORMATIVE CONNECTION	
BRAND PILLARS	UNEXPECTED DIVERSITY, UNINHIBITED SPACE	UNEXPECTED DIVERSITY, INSPIRING DISCOVERIES	REWARDING ADVENTURES, INSPIRING DISCOVERIES	
INSIGHT(S)	 <i>Competitive</i>: No competitive state is utilizing unique experiences in its messaging <i>Brand</i>: Hot springs, stargazing, unplugged experiences, and ghost towns were key attributes of interest for respondents in the IME <i>Audience</i>: Coming out of the COVID era, consumers crave spontaneity and the ability to live in the moment Exploring and doing new things is a key travel motivator for the target audience 	 <i>Competitive:</i> Saturated with outdoor recreation, the competitive landscape currently has few showcases of arts and culture <i>Brand:</i> IME study found that local history, culture, and cuisine are valued by the target audience but seen as lacking in Nevada <i>Audience:</i> Travelers have a reinvigorated desire to connect with the local offerings and support local businesses 	 <i>Competitive:</i> Connections and family is not heavily utilized by competitors <i>Brand:</i> IME study showed that most Nevada visitors travel in pairs, presenting an opportunity to promote family/group travel <i>Audience:</i> Coming out of a year of lost connections, travelers seek to reunite with distant loved ones or spend quality time with those closest to them Spending quality time with family is a key travel motivator for the target audience 	
EXPERIENCES	 Weird Nevada (Extraterrestrial, Republic of Molossia, Haunted Nevada) Ghost towns Stargazing Uncommon Overnighters (Unique stays) Hot Springs 	 Basque culture Outdoor art (Seven Magic Mountains, Art Cars, Goldwell Open Air Museum) Art districts Estate distilleries Sagebrush saloons 	 Road trips Mining and rockhounding Wildlife and animal sanctuaries Railroad history Stargazing 	
AUDIENCE CONNECTION	Uncharted-Experience Junkie Outdoor Recreationalist	Cultural Traveler	Outdoor Recreationalist Opportunity to add a Family / Group Travel Target	

TRAVEL NEVADA FY22 domestic market media recommendation



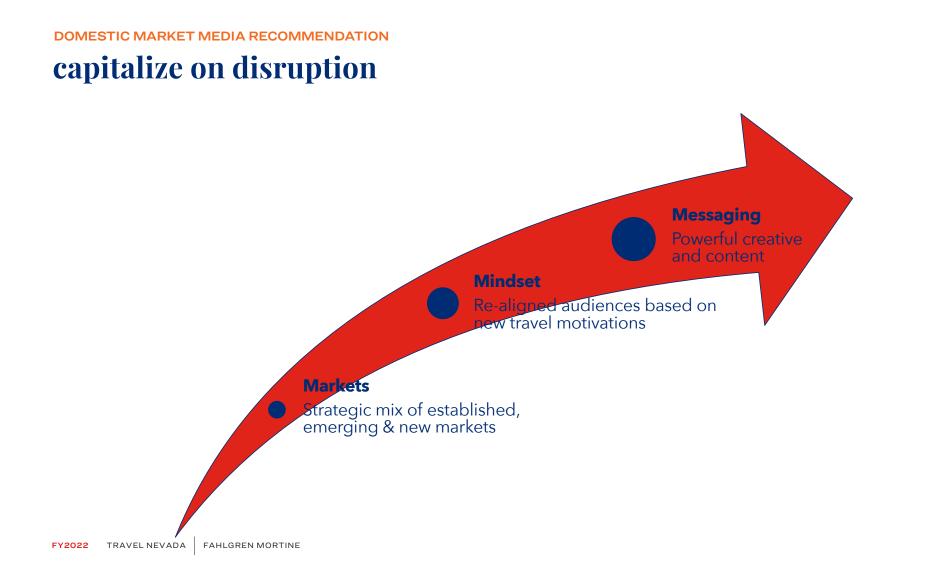
TRAVEL NEVADA FY22

DOMESTIC MEDIA RECOMMENDATION

- Strategic Overview
- Tactical Approach
- Required Asset Summary
- Content Production Summary
- Scaling Budget Additions

DISCOVER YOUR NEVADA OVERVIEW





DOMESTIC MARKET MEDIA RECOMMENDATION

our mindset approach

The Adventure State-of-Mind



Cultural Traveler



Outdoor Recreationalist



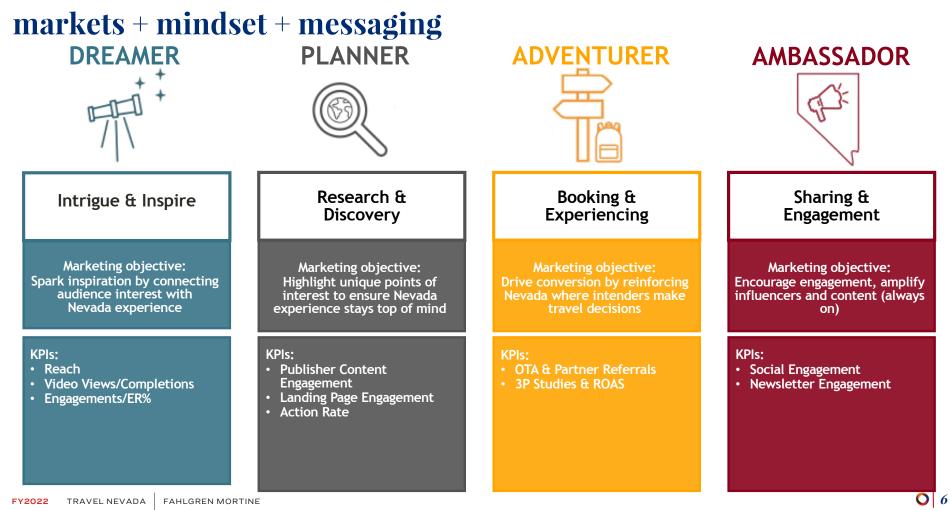
Uncharted Experiences Junkie

DOMESTIC MARKET MEDIA RECOMMENDATION

our market approach

- Defend our core **established** markets
 - Maintain our strong current position as a destination of choice in established markets to guarantee consistent tourism revenue.
 - Sacramento, San Francisco, LA, Boise, Phoenix, Salt Lake City and San Diego
- Stake our claim in <u>emerging</u> markets
 - Increase our market share where travel intenders are increasingly raising their hands since pandemic
 - Dallas-Ft. Worth, Portland and Houston
- Capitalize on disruption in <u>new</u> markets
 - Strategically invest in markets where pandemic disruption has created opportunity for Nevada to enter the consideration set
 - Seattle, Chicago and Minneapolis-St. Paul or Denver (flight availability?)
 - High audience index + avg length of stay + competitive separation + access

DOMESTIC MARKET MEDIA RECOMMENDATION



DOMESTIC MARKET TACTICAL APPROACH

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RECOMMENDED MEDIA TACTICS targeted digital video + audio + paid social

	Connections Strategy	Partners/Platforms
Advanced TV	Maximize reach and inspire consideration with highly-targeted video across platforms that saw surges in consumer adoption during 2020	AT&T V SouTubeTV
Publisher Direct Streaming Video	Supplement overall video buy with direct buys on high indexing networks that offer unique executions for Travel Nevada	
Podcast Promotion	Drive downloads, listens and subscriptions of Travel Nevad Existing podcast content	
Stories	Inspire new audiences to learn more in the visually engagi format	ing
Paid Social	Utilize detailed interest & travel-intent targeting to drive engaged website traffic	
Lead Generation	Continue to develop Travel Nevada enewsletter database successful program	with this
FY2022 TRAVEL NEVADA FAHL	GREN MORTINE	0 8

recommended media tactics targeted digital video + audio + paid social

	Primary Phase	Target Markets	KPIs
Advanced TV	Dreamer	Emerging + New	Reach Video Views/Completions
Publisher Direct Streaming Video	Dreamer	Emerging + New	Reach Video Views/Completions
Podcast Promotion	Dreamer	All	Listens/Downloads Engagements
Stories	Dreamer	Emerging + New	Reach Engagements
Paid Social	Planner	All	Landing Page Engagement Action Rate
Lead Generation	Adventurer	All	Leads Generated
FY2022 TRAVEL NEVADA FA	HLGREN MORTINE		(

new & notable

Advanced TV



- Leverage :30 spot
- In addition to accepting Arrivalist tracking, we can place conversion pixels on key actions on TravelNevada.com
 - Partner can attribute digital action back to previous living room video-exposure
- Furthermore, our partner will geofence 20-30 key locations for a foot traffic analysis

FY2022 TRAVEL NEVADA FAHLGREN MORTINE





- Opportunity to drive engagement of Travel Nevada podcasts on SoundCloud.
- Promoted podcast placement encourages the Travel Nevada target audience to **listen now** or, to **download the podcast** so their "glovebox" is stocked
 - 34-50k Travel Nevada plays estimated
 - Demo + Geo targeted

recommended media tactics essential traveler journey vehicles

	Connections Strategy	Partners/Platforms		
OTAs	Deliver targeted messaging to users actively in the planning mindset, encouraging them to choose Nevada	xpedia [®] priceline [®] [©] tripadvisor [®]		
1 st Party Travel Data Providers	Leverage advanced data providers to efficiently drive qualified site-traffic and generate intent-to-travel actions			
Endemic Travel Publishers	Reach our target and inspire further action with high-impa content and placements within Travel specific publishers	horeky planet TRAVELZOO		
Adventure State-of-mind	Encourage travelers at other parks to download Nevada c they can listen to on their current journey, helping make N next destination			

recommended media tactics essential traveler journey vehicles

	Primary Phase	Target Markets	KPIs
OTAs	Adventurer	All	Engagements OTA Booking reporting
1 st Party Travel Data Providers	Planner	All	Action Rate Proprietary ROAS reporting
Endemic Travel Publishers	Planner	All	Publisher content engagement Engagement on TN.com
Adventure State-of-mind	Adventurer	All	Video Views Engagements

new & notable



- Inspire Travel Nevada's target audience with 3x custom articles featuring unique Nevada experiences.
- Capture attention with 1x "Text Led" video
 - On-site video production (+photography for 3x articles)
 - 3 years of content licensing







- Custom content hub on *TripAdvisor*:
 - 3x editorial pieces featured
 - 3x curated trips
 - 3x custom Instagram story promotions

recommended media tactics partner with key publishers

	37	Partners/Platforms
Travel	Reach Travel Nevada's target audience(s) in the early stages of planning and highlight Nevada's unique experiences to inspire additional exploration culture tri	P Atlas Obscura
Lifestyle	Expand our audience's connection to Nevada with a Western lifestyle publisher	Sunset
Content Production	Continue to build out a library of fantastic content by working with established partners that can also distribute content to their relevant audiences	MATADOR network
BIG Idea	Elevate Nevada's position as a dark sky destination by combining celestial content within traveler friendly itineraries and road trips.	THRILLIST

recommended media tactics partner with key publishers

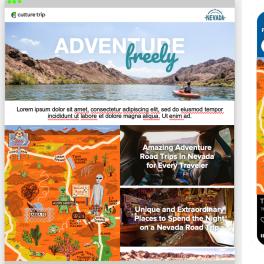
	Primary Phase	Target Markets	KPIs
Travel	Planner	Emerging + New	Publisher content engagement Landing page engagement
Lifestyle	Planner	Emerging + New	Publisher content engagement Landing page engagement
Content Production	Dreamer	Emerging + New	Content creation & usage rights Content engagement
BIG Idea	Dreamer	All + National	Reach Content engagement

RECOMMENDED MEDIA TACTICS



- "Nevada Week" takeover
 - 5 days of homepage, social and newsletter promotion
- Opportunity to re-amplify strong content already created to new + emerging markets.
 - 2019 <u>Virginia City video</u>







- Production of another highly successful illustrated map
- New Spotlight Hub to house 3x new articles, existing content and both maps
 - Travelers can click to book directly from the hub

recommended media tactics thrillist

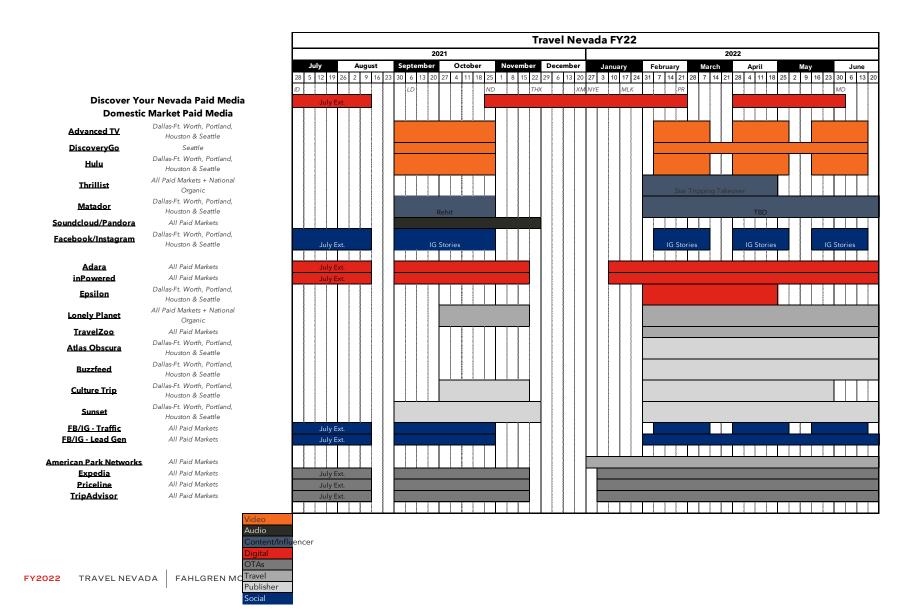
- In 2020, Nevada's audience(s) came to *Thrillist* for Road Trip & Stargazing Content like never before.
 - 60% increase in YOY engagement with road trip content
 - **513%** increase in YOY engagement with stargazing and astronomy content
- To keep up with demand, *Thrillist* has doubled down on content for 2021 and 2022 and is proposing Travel Nevada be the **launch sponsor** of a brand-new **content vertical** "Star Tripping" country.
 - Star Tripping combines two of Thrillist's most engaged content themes to deliver a unique take on travel and outdoor recreation, with Travel Nevada at the forefront.
 - This pop-up vertical under Thrillist Travel will feature a dynamic mix of interactive itineraries and editorial deep-dives delivering space news in a format that anyone can use.



recommended media tactics thrillist

- *Star Tripping* Sponsorship includes:
 - 100% SOV of the Star Tripping pop-up vertical for (3x) months
 - Fixed alignment with 12x editorial features
 - 3x Episodes of Thrillist Explorers
 - 1x Custom article with interactive map feature
 - Sponsor in all organic promotion
- 5 million impressions (guaranteed minimum)
- 575,000 video views (guaranteed minimum)
- 35,000 custom article views (guaranteed minimum)





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+ Chicago in all tactics

mid-level budget scenario



includes all mid-level additions

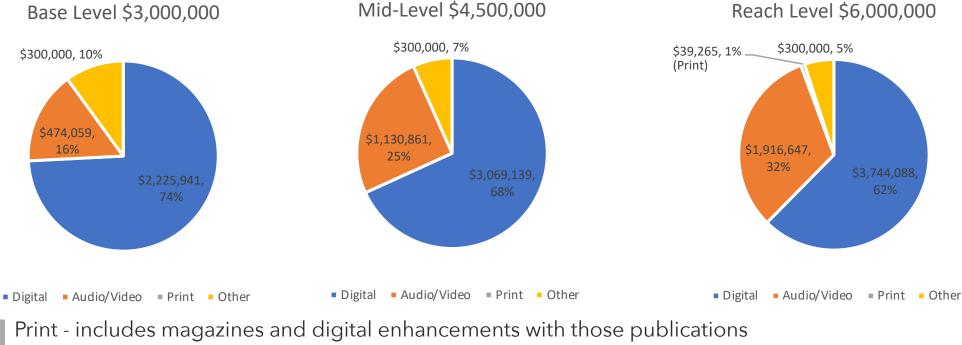
recommended media tactics reach-level budget scenario

+ Minneapolis or Denver in all tactics



DOMESTIC MARKET MEDIA RECOMMENDATION

paid media budget levels



Digital Programs - includes social, online travel agencies (OTA) and other online companies

Audio/Video - includes streaming video, digital video and podcasts

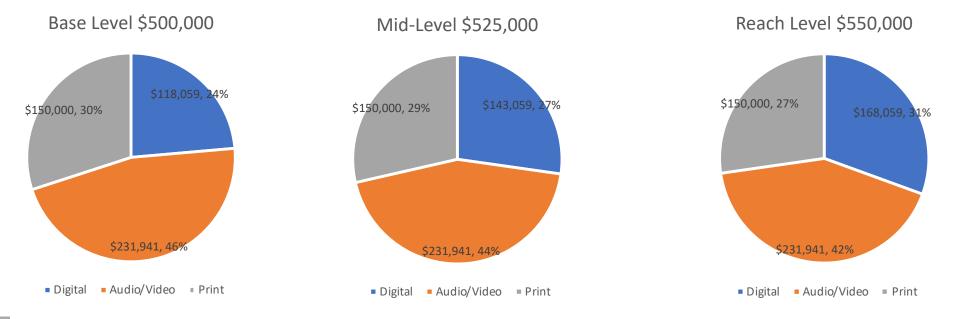
Other(account management and other fees)

RECOMMENDED MEDIA TACTICS discover your nevada

	Connections Strategy	Partners/Platforms
Broadcast & Cable Television	Inspire Nevadans to find the Nevada they didn't know	Spectrum NBC FOX Spectrum
1 st Party Travel Data Providers	Drive traffic and generate intent-to-travel actions on DiscoverYourNevada.com by showcasing how Nevadans can explore their state	in Powered
Instagram Stories	Inspire new audiences to learn more in the visually engaging format	
Local Print Partners	Connect with Nevadans in their go to local sources of news and entertainment LAS VEG	GREENSPUN MEDIA GROUP W- JOURNAL

Other local partners on a seasonal basis

budget levels



Print - includes local newspapers, magazines and digital enhancements with those publications Digital Programs - includes social and other online companies Audio/Video - includes local broadcast and cable television 06 | 09 | 21

Travel Nevada

Creative Execution

BVK

:30 TV SPOT



:30 TV Spot – "Welcome to Nevada - Just the Place"



https://www.youtube.com/watch?v=78kSBW6vYQA



DISPLAY BANNERS



Brand Awareness Banners

Additional lines:

Turn "We'll see" into "We saw."Hunt for rocks. Find truth.More civil than civilization.Sand is good for the soul.Play hide and thrill seek.

OPTION 1



SIER INTO-THE WILD, VILD, WEI Let's explore

OPTION 3

OPTION 2



Unique Points of Interest Banners

Additional lines:

Need a strange of scenery?

Live it up in a Ghost Town

Aliens, comets & stars, oh my!

Don't ask why. Ask what's next? (Car Forest)

What goes up, must be art. (Shoe Tree)

OPTION 1 (UNUSUAL EXPERIENCES)



OPTION 2 (INSPIRING CULTURE)



OPTION 3 (TRANSFORMATIVE CONNECTION)



Booking Banners

Additional lines:

Find your secret hiding place.Nevada's ready. Are you?Come hear yourself think. And feel.Give inner peace a chance.Get into being out of bounds

OPTION 1



OPTION 2



N EVA DA. N I R VA DA. S A M E DI F F E R E N C BOK NOW -

OPTION 3



PAID SOCIAL



Instagram Story–Unusual Experience

NEVADA LET'S EXPLORE>

GET CLOSER TO A CLOSE ENCOUNTER. Let's explore>



Instagram Story-Inspiring Culture

NEVADA Sponsored S LET'S EXPLORE> ADMO.I

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Instagram Story–Transformative Connection

travelnevada

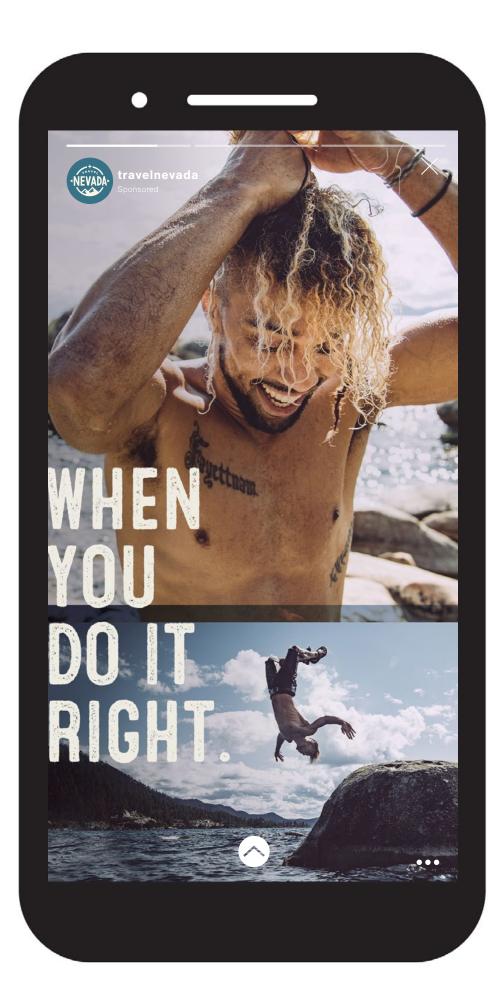
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WE GIVE YOU MORE TO MORE TO NUSH UPON. Let's explore>

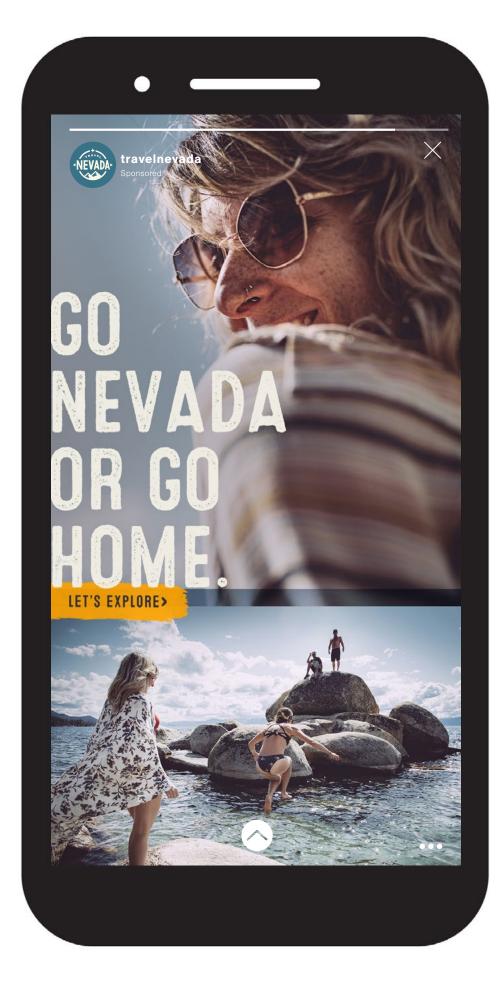
...



Instagram Story (multiple)









Thank you

BVK



objectives & KPIs		Overarching Goal:Drive visitation, primarily overnightPR Goals:••Secure feature placements in 10% ••KPIs: Top 100 features, pote•Secure coverage in 25% of Top 100 key message included ••KPIs: Top 100 mentions, key potential reach ••Maintain 50% key message inclusion	of Top 100 outlets ential reach o outlets with at least one y message inclusion, Host eig ential ential reach Maintain ential reach ential reach ential ential reach ential reach ential reach ential reach ential re
Priorities	strategies & tactics	 KPIs: Total placements, key Our efforts will continue to focus on both immediate a media/influencers and inspirational, reputation-buildi journalist editorial plans and will be mapped on a PR of Immediate visitation tactics Proactive/reactive media outreach Regional influencer road trip route extensions Regional media briefings 	and future visitation by pitching actionabl ng travel experiences to national media. P
A	audiences	<u>Geography:</u> Nevada, Drive-markets, Domestic travele <u>Mindsets:</u> Media outreach will be targeted at publicat Cultural Traveler	
722	key orylines	common throughout the region are c elements of a culture unique to Nevada, he	g, creating consistency and synergy along <u>Transformative Connection</u> After 15 months of isolation, people are raving interactions and experiences that elp them feel fully alive, and Nevada has lenty to offer like stargazing among the

ht traditional journalists in-state from Top 100 outlets

- (PIs: FAMs, media briefings, one-on-one orrespondence
- an SEO average of 55+ in earned coverage log
 - (PIs: Domain rank authority, link inclusion

le travel information to in-state and drive-market Pitch angles and topics will align with key storylines and

- nedia boxes
- rget markets
- edia/influencer FAMs

arlotte, Houston, Atlanta, etc.) e of the following segments.

> Uncharted **Experiences** Junkie



the traveler journey.

si lowns, public art and more.

S.

plenty to offer, like stargazing among the darkest skies or exploring untouched lands.

Unusua<u>l Experiences</u>

Celebrating and showcasing the people, places and things throughout Nevada that are weird, out-there, spontaneous and leaning into those adjectives to describe them.





- Seeking approval from Marketing Committee to advance recommended media plan to the Nevada Commission on Tourism
- Nevada Commission on Tourism meeting June 15
- Upon approval, proceed at base budget level
- With NCOT approval, will implement plans as budget allows
- Updates provided to Committee/Commission quarterly