

Travel Nevada



Content Framework Exploration & Recommendations

THE CONTEXT

Travel Nevada seeks to explore the current travel landscape to ensure the Freedom of Self-Discovery strategy is relevant and differentiated and to find opportunities for optimization.

EXPLORATION

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Outdoors and adventure continue to dominate the competitive landscape, however competitors are also leveraging messaging around family and connecting in response to travelers' increased desire for family travel.



EXPLORATION

Transformative travel and unique, quirky experiences continue to be open territories.



Consumers continue to seek connection while traveling, not only with their families, but also by meeting locals, making friends and pursuing romance.

48%

of Americans say their next trip will be **family-focused**

– KANTAR U.S. MONITOR: DOWNLOAD ON TRAVEL 2021

51%

of respondents say they want to **meet new people** while traveling

– BOOKING.COM

36%

of respondents are hoping for a holiday romance on their next trip

– BOOKING.COM



EXPLORATION

Spontaneity and openness continue to be important travel drivers – travelers desire to think outside the box and get out of their comfort zone. Gen Zers, Business Travelers and Hispanic individuals emerge as being particularly interested in being open and spontaneous.

62% said they'll say yes to any travel opportunity their budget allows, while money is no object for **39%**.

– BOOKING.COM

There is this drive to do more now, to be more adventuresome, and a desire to explore and get out of our comfort zone

... now it's more like, 'Let's go to Iceland.' 'Let's think outside the box.'

Because we've been in the box."

– THE BOSTON GLOBE

74% of Gen Z said:

"I AM ALWAYS LOOKING FOR DIFFERENT CULTURAL EXPERIENCES AND INFLUENCES THAT WILL BROADEN MY HORIZONS."

Compared to 59% of Millennials.

– KANTAR U.S. MONITOR

56% of Business Travelers said:

"IT IS IMPORTANT TO LIVE IN THE MOMENT AND MAKE THE MOST OF WHAT TODAY HAS TO OFFER."

Compared to 43% of the general population

– KANTAR U.S. MONITOR

77% of Hispanics said:

"I AM MORE LIKELY TO CHOOSE A BRAND IF IT EXPOSES ME TO NEW SENSATIONS OR EXPERIENCES"

Compared to 62% of the rest of the population

– KANTAR U.S.
MONITOR

Simplicity is key—in an era of restrictions, protocols and stress, travelers are looking to relax and rejuvenate.

39%

of Americans say their next trip will be **simple**

— KANTAR U.S. MONITOR: DOWNLOAD ON TRAVEL 2021

relaxation (44%) &
stress relief (22%)

are the top reasons for a trip right now

— KANTAR U.S. MONITOR: DOWNLOAD ON TRAVEL 2021

76%

of consumers want to spend more on travel to improve their well-being

— AMERICAN EXPRESS SURVEY

“With changing guidelines and precautions, traveling in a COVID world can be confusing and stressful—the opposite of what people want for their vacation time. In response, many companies are creating **specific travel offerings like real-time travel guides and safety-net packages to attract local tourism.**”

— KANTAR U.S. MONITOR

EXPLORATION

Consumers increasingly want to be seen as a traveler, not a tourist. They seek to have authentic and immersive local experiences and stay in unique accommodations. Off-season travel emerges as the new aspiration, as it can reduce crowding and provide a more authentic experience.

80%

of luxury travelers are willing to travel to destinations during the offseason so that it is less crowded

— AMERICAN EXPRESS GLOBAL TRAVEL TRENDS REPORT

“People will increasingly **want to be more traveler than tourist, desiring local events and experiences.**”

— KANTAR U.S. MONITOR

“People in the United States are searching for stays in

traditional Italian dammusos, Grecian cycladic homes, quaint English shepherd's huts, and even igloos.”

AIRBNB

7 in 10

consumers want to be able to filter for unique stays on Airbnb

— AIRBNB

68%

of consumers want to have authentic experiences that are representative of the local culture

— BOOKING.COM SURVEY

THE GREAT RESET

Confronting the realities of the pandemic and the uncertain economy, consumers are looking to reset their goals and redefine their life. They seek a fresh start and the ability to re-discover who they are and what is truly important to them.

81% of Gen Zers and 86% of Millennials said:

“THE PANDEMIC HAS MADE ME RE-EVALUATE WHAT IS IMPORTANT IN MY LIFE.”

– KANTAR U.S. MONITOR

11%

of Americans have chosen to make a major job or career change completely or partially due to the pandemic

– KANTAR U.S. MONITOR

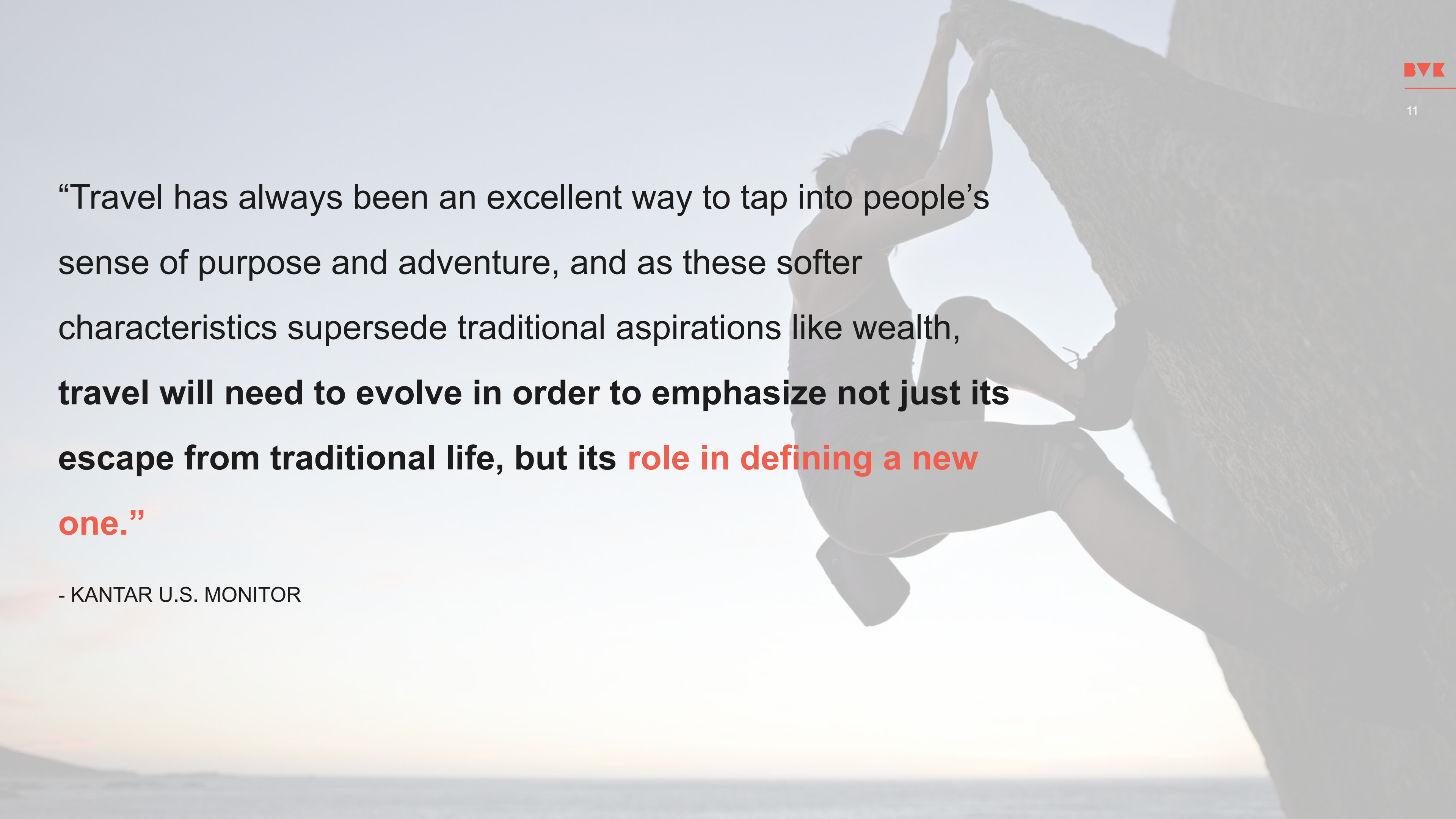
“SOME OF THE DREAMS I HAD FOR MYSELF BEFORE THE PANDEMIC ARE NOW PROBABLY OUT OF MY REACH.”

39% of Gen Z and 41% of Millennials vs.
32% of Gen X and 24% of Boomers

– KANTAR U.S. MONITOR

“Increasingly, people are prioritizing community, happiness, travel, personal growth and having the ability to control more elements of their lives (e.g., designing your own work schedule) over traditional aspirations.”

– KANTAR U.S. MONITOR

A person is climbing a large, dark rock face. The person is wearing a dark tank top and shorts, and is using their hands and feet to grip the rock. The background shows a bright sunset or sunrise over a body of water, with the sky transitioning from orange to blue. The overall mood is adventurous and inspiring.

“Travel has always been an excellent way to tap into people’s sense of purpose and adventure, and as these softer characteristics supersede traditional aspirations like wealth, **travel will need to evolve in order to emphasize not just its escape from traditional life, but its role in defining a new one.”**

- KANTAR U.S. MONITOR

RECOMMENDATIONS

FREEDOM OF SELF-DISCOVERY

As the pandemic causes individuals to seek new experiences, re-set priorities and redefine their goals and aspirations, the Freedom of Self-Discovery is more important than ever.

STRATEGY SUMMARY

CONTENT FRAMEWORK RECOMMENDATIONS

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)	<ul style="list-style-type: none"> <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 	<ul style="list-style-type: none"> <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 	<ul style="list-style-type: none"> <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	<ul style="list-style-type: none"> Weird Nevada (Extraterrestrial, Republic of Molossia, Haunted Nevada) Ghost towns Stargazing Uncommon Overnights (Unique stays) Hot Springs 	<ul style="list-style-type: none"> Basque culture Outdoor art (Seven Magic Mountains, Art Cars, Goldwell Open Air Museum) Art districts Estate distilleries Sagebrush saloons 	<ul style="list-style-type: none"> 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
RECOMMENDATIONS	<ul style="list-style-type: none"> Opportunities exist to target Gen Z, Hispanic travelers and Business/Bleisure travelers as they seek spontaneity and new, unusual experiences Leverage the Unique Stays trend by increasing focus on Uncommon Overnights 	<ul style="list-style-type: none"> Position off-season travel as a way to have a positive impact on the destination while having a more authentic experience Develop opportunities for travelers to connect with locals 	<ul style="list-style-type: none"> In addition to family connection, emphasize how travelers can connect with locals and meet new people in Nevada
	<ul style="list-style-type: none"> Feature Nevada experiences that are simple, improve wellness and mental health and encourage self-care and discovery Demonstrate how a trip to Nevada can help travelers reset and re-define who they are and what is important to them 		

THANK YOU

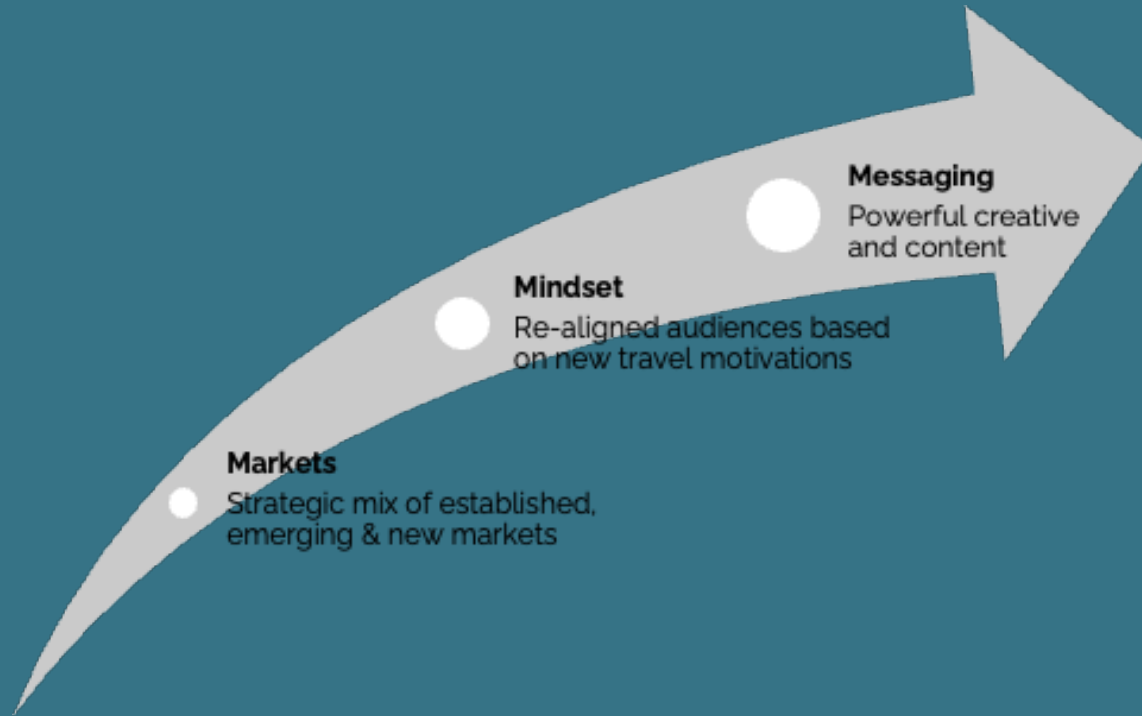


**TRAVEL NEVADA
MARKETING COMMITTEE
FAHLGREN MORTINE UPDATE**

November 18, 2021



CAPITALIZE ON DISRUPTION



FY22 Paid Media - 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

Market examples: LA, San Francisco, San Diego, Sacramento, Salt Lake City, Boise and Phoenix

- **Stake our claim in emerging markets:**

Increase our market share where travel intenders are increasingly raising their hands since pandemic

Market examples: Dallas-Ft. Worth, Houston, Portland

- **Capitalize on disruption in new markets:**

Strategically invest in markets where pandemic disruption has created opportunity for Nevada to enter the consideration set

Market examples: Denver, Chicago, Seattle, Atlanta, Minneapolis-St. Paul

High audience index + avg length of stay + competitive separation + access

FY22 Paid Media - Market Approach

DREAMER



Intrigue & Inspire

Marketing objective:
Spark inspiration by connecting
audience interest with
Nevada experience

KPIs:

- Reach
- Video Views/Completions
- Engagements/ER%

PLANNER



Research & Discovery

Marketing objective:
Highlight unique points of
interest to ensure Nevada
experience stays top of mind

KPIs:

- Publisher Content Engagement
- Landing Page Engagement
- Action Rate

ADVENTURER



Booking & Experiencing

Marketing objective:
Drive conversion by reinforcing
Nevada where intenders make
travel decisions

KPIs:

- OTA & Partner Referrals
- 3P Studies & ROAS

AMBASSADOR



Sharing & Engagement

Marketing objective:
Encourage engagement, amplify
influencers and content (always
on)

KPIs:

- Social Engagement
- Newsletter Engagement



Paid Media – FY22 Q1/Q2
Initial Results/Trends



FY22 Paid Media - July Extension Campaign

- The primary objective of our July extension campaign was to continue FY21 momentum while the inter-agency team completed work on new materials for FY22
- As restrictions lifted and leisure travel continued to increase, it was important that Travel Nevada not go dark and continue to reach potential travelers as they looked for more information
- Using existing FY21 assets, we deployed targeted display, native, OTA placements and paid social
- In-state, our Discover Your Nevada creative ran during the 2021 Summer Olympics



FY22 Paid Media – Sept-Nov Flight

DREAMER



PLANNER



ADVENTURER

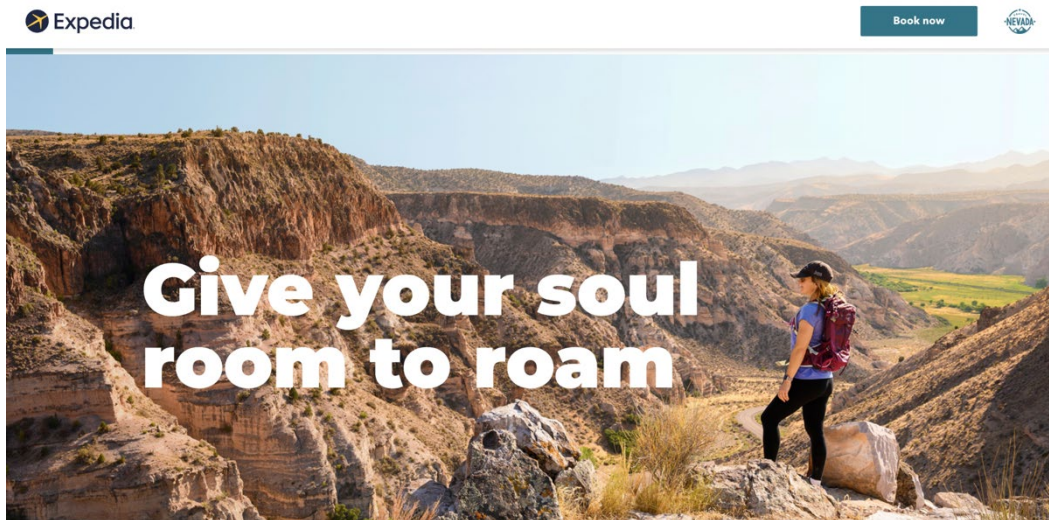


FY22 Paid Media – Key Learnings - OTA

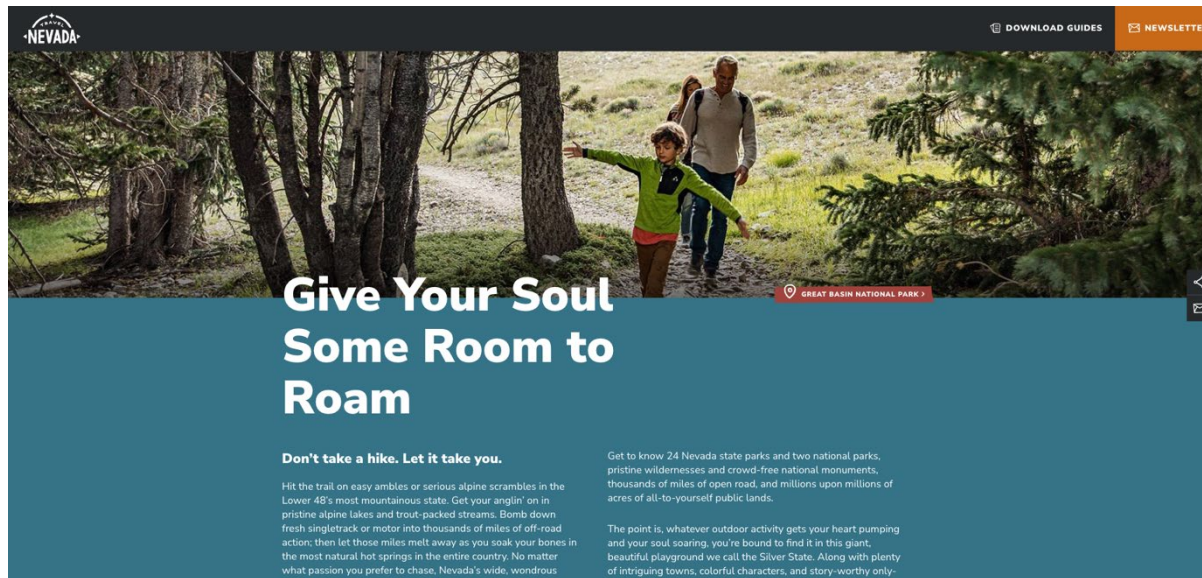


New Creative

New "Spotlight" Landing Page



FY22 Paid Media – Key Learnings – Landing Page



137% increase* in Conversion Rate

- **Custom content development continues!**
 - Thrillist continues to roll out
 - Culture Trip will be fully launched
 - Lonely Planet video and content editing, rolls out
- **Discover Your Nevada**
 - In-state flight kicks off this month
- **Landing Page Optimization**
 - Additional customization
- **Tier 2 Budget Level**
 - Identify market priorities and primary objective for the additional investment