

TRAVEL NEVADA

TOURISM & ECONOMICS

For Nevada to be successful, we must look at the entire ecosystem of how we are serving our citizens. This means infrastructure, education, economic development and more.

Travel Nevada is dedicated to ensuring that tourism supports the state's focus on these issues by developing and implementing a robust sales, marketing, and public relations strategic plan to attract travelers who spend time and money in the state.

Here are some points that may help you understand how Travel Nevada functions and the role of tourism throughout the state of Nevada.

- The Nevada Division of Tourism (Travel Nevada) is one of the only state entities to generate money for the General Fund each year without drawing any money from it. An increase in revenue generated for the General Fund will support key statewide initiatives such as education.
- Tourism impacts the entire state, not just metropolitan areas. **Total Lodging Taxes collected statewide in FY19 were more than \$933 million** according to the Department of Taxation's lodging receipt report. This is an increase of about 5.3% from the FY18 report.
- Tourism Economics, a leading research firm that specializes in the tourism industry anticipates that COVID-19 will have an impact on revenue in 2020. They indicate that the extent of the decline is unique due to the coronavirus, and illustrate that after other devastating crises (terrorism, hurricanes, wild fires, recessions), the travel industry has survived, recovered, and then flourished. While timing is a key variable, they anticipate the same to happen following the end of the current health crisis.
- Tourism Economics states that **83% of tourism businesses are small businesses.**
- Visitor spending directly generated 296,810 Nevada jobs in 2018, and a total of 463,440 jobs when indirect and induced impacts are considered — an increase of 1% from 2017, offering jobs at all levels of professional growth as well as entrepreneurial opportunities and jobs for retirees. **This makes up roughly 26% of Nevada's workforce.**
- In rural Nevada, total employment attributable to tourism is more than 28,000 jobs — an increase of about 0.6% from 2017.
- Total visitor-generated spending in rural Nevada in 2018 was about \$2.9B, an increase of about 3.4% from 2017.
- Travel and Tourism (including hospitality and gaming) continues to be Nevada's leading economic engine. **In 2019, more than 56 million travelers visited Nevada.** Visitor volume for rural Nevada (counties outside of Clark County and Washoe County) saw the largest increase in visitor volume compared to 2018, with an increase of about 2.3%.
- **Visitors spent \$40.8 billion in Nevada in 2018**, representing an increase of 18% since 2013. Direct visitor spending of \$40.8 billion translated into \$65.5 billion in business sales including indirect and induced impacts.
- Visitors generated \$10.3 billion in federal, state, and local taxes in FY18. Each household in Nevada would need to be taxed an additional \$4,630 per year to replace the state and local taxes generated by visitors.
- The \$4.9 billion in state and local taxes generated by tourism in fiscal year 2018 would cover the starting salaries of nearly 128,600 state school teachers in Nevada (~\$37,973, NEA 2016-2017).
- In 2018, \$20.7 billion in total income was generated by tourism — that is the equivalent of \$19,600 for every household in Nevada.
- In 2018, the \$40.8 billion in visitor spending meant that **\$111.6 million was spent EVERY DAY by visitors** to Nevada.

TRAVEL NEVADA REPORTS

1. ECONOMIC IMPACTS DASHBOARD

WHAT IT IS:

The **Economic Impacts Dashboard** provides statistics on the economic value of visitors to the state of Nevada, conducted by Tourism Economics.

HOW TO USE IT:

Partners can click on the different tabs available to view statistics measuring visitor spending by category, tourism employment, personal income, and taxes generated by visitor activity. The data is available for five years of history and can be viewed at the state and county level.

HOW TO GET THERE:

Go to the Research and Reports page on travelnevada.biz. Under "Interact With The Data," click "Economic Impacts By County."

Refer to #1 on the reference sheet.

1A. VISITOR SPENDING

WHAT IT IS:

Part of the **Economic Impacts Dashboard**, this report provides estimates for visitor spending, broken down into categories of accommodations, food and beverage, gaming, recreation, retail and transportation, available for each county of the state.

HOW TO USE IT:

This data helps to illustrate the different sectors that visitors impact. If visitation is decreased, or funding to promote tourism is cut, this will not only affect the hotel sector,

it will also impact local restaurants, casinos, retailers, and more. This tab also illustrates estimates for total visitor spending over time for an individual county.

HOW TO GET THERE:

Go to the Research and Reports page on travelnevada.biz. Under "Interact With The Data," click "Economic Impacts By County," and navigate to the "County Focus — Visitor Spending" tab.

Refer to #1A on the reference sheet.

1B. ECONOMIC IMPACTS

WHAT IT IS:

Another tab on the **Economic Impacts Dashboard**, this estimates the level of employment, income, taxes generated, and spending generated by visitors available for each county of the state.

Impacts on this page are broken down by "Direct" impacts and "Total" impacts generated by visitation. "Direct" impacts are directly attributable to visitors. For example, if a visitor spends money on a hotel or dines at a local restaurant, these are considered "Direct" impacts as a visitor is directly spending money on these items.

"Total" impacts include the "Direct" impacts but also include secondary impacts. If a hotel, which receives money directly from visitors, purchases utilities (or any other business input), the utility company is impacted indirectly from visitors via spending by the hotel. Also, when an employee of that hotel spends money in the local economy on food, gas, clothes, etc., local companies who benefit from this spending are also not directly impacted by a visitor but are impacted by the employee's spending. These are both examples of secondary impacts of visitor spending and are included as part of the "Total" impacts.

HOW TO USE IT:

Impacts outlined in this tab help to tell the story of how much tourism and visitor spending contributes to an individual county, whether the impacts are directly attributable to visitors or include secondary impacts. This data can help inform how many members of the county, or how much business activity, is reliant on the travel industry through jobs, income, spending, and more.

HOW TO GET THERE:

Go to the Research and Reports page on travelnevada.biz. Under "Interact With The Data," click "Economic Impacts By County," and navigate to the "County Focus - Economic Impacts" tab.

Refer to #1B on the reference sheet.

2. VISITOR PROFILES

WHAT IT IS:

Profiles for each territory of the state detailing information such as spending per overnight visitor, advance travel planning time, trip planning information sources, trip activities experienced, and other statistics that can help aid in marketing efforts.

HOW TO USE IT:

These profiles can give a sense for how far in advance travelers typically plan travel, what information they use to plan a trip, what activities they experienced on their trip, and other statistics that can help aid in marketing efforts and how these have changed over time. Statistics such as spending per day for an overnight visitor (Question 2 in each profile) can also show the value that an extra overnight visitor can bring to a local economy. This can help to quantify how much money may be lost to a community by reductions in overnight visitation due to an event being cancelled, budgets being cut, and the like.

HOW TO GET THERE:

Go to the Research and Reports page on travelnevada.biz. Under "Browse Our Research," click "View Visitor Statistics and Profiles."

Refer to #2 on the reference sheet.

3. DISCOVER THE FACTS

WHAT IT IS:

Interactive data on room taxes, visitor volume, occupancy rates, room nights occupied, room inventory, gross gaming revenue, convention attendance, airport volume, vehicle traffic counts, and park usage.

HOW TO USE IT:

Partners can toggle between stats by clicking the arrow in the top left corner and can toggle by location in the state by clicking the "Location" box above the line chart. The data will show numbers for the most recent quarter, the last 12 months, show data over time, and more. This allows partners to see how the travel industry in Nevada is faring for the state as a whole and for different regions of the state. Though many of the statistics (but not all) for rural Nevada are aggregated due to sample size issues, the numbers can still be used to determine how tourism in rural Nevada is performing for a particular month, quarter, or year.

HOW TO GET THERE:

Go to the Research and Reports page on travelnevada.biz. Under "Interact With The Data," click "Discover The Facts Dashboard."

Refer to #3 on the reference sheet.

TRAVEL NEVADA REPORTS—REFERENCE

1. ECONOMIC IMPACTS DASHBOARD

The Economic Impacts Dashboard allows partners to toggle estimates of visitor spending by county.



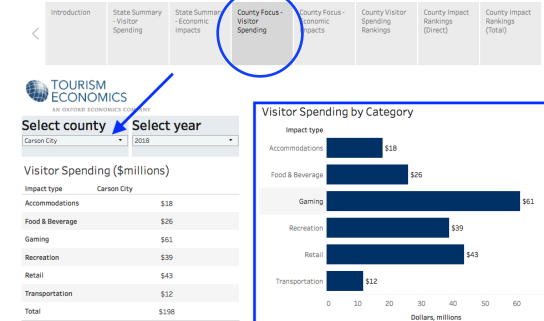
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1A. VISITOR SPENDING

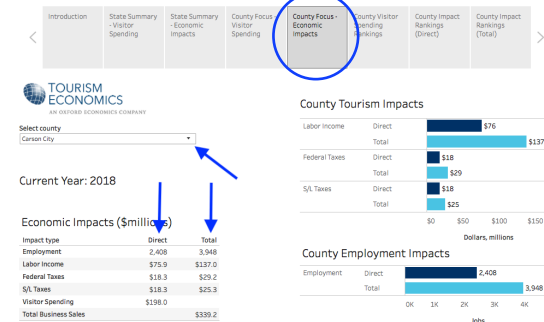
The Economic Impact of Tourism in Nevada



- Toggle by county and year
- Estimates visitation spending
- Categories such as accommodations, food and beverages, gaming, etc.

1B. ECONOMIC IMPACTS

The Economic Impact of Tourism in Nevada



- Level of employment
- Income and taxes generated
- Spending from visitors
- Able to be toggled by county

NOTE:

Impacts for each are broken down by **“Direct” impacts** (impacts that are directly affected by visitors) and **“Total” impacts** (direct plus secondary impacts) generated by visitation.

This data can help inform how many members of the community are reliant on the travel industry by county when it comes to jobs, income, spending on local businesses, and more.

TRAVEL NEVADA REPORTS—REFERENCE

2. VISITOR PROFILES

Visitor profiles for **each territory of Nevada**, as well as for **rural Nevada as a whole**, are available.



- See an overview of travel to each area over time
- Spending per day for an overnight visitor
- Day trip percentage
- Demographics
- Activities experienced on a particular trip and more

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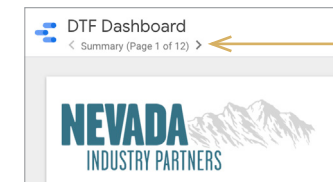
3. DISCOVER THE FACTS

The **Discover the Facts Dashboard** allows partners to see how the travel industry in Nevada is faring for the state as a whole and for different regions of the state.

NEVADA INDUSTRY PARTNERS		Discover the Facts Dashboard	
Room Tax Collections		Gross Gaming Revenue	
4th Quarter 2019 \$6,347,836 ↑ 6.9%	Rolling 12 Month Total (Jan '19 - Dec '19) \$25,886,990 ↑ 5.0%	4th Quarter 2019 \$3,016,984,313 ↓ -0.4%	Rolling 12 Month Total (Jan '19 - Dec '19) \$12,030,686,599 ↑ 1.0%
Visitor Volume		Convention Attendance	
4th Quarter 2019 13,799,206 ↑ 1.0%	Rolling 12 Month Total (Jan '19 - Dec '19) 56,092,230 ↑ 0.6%	4th Quarter 2019 1,573,131 ↑ 0.8%	Rolling 12 Month Total (Jan '19 - Dec '19) 6,991,371 ↑ 2.6%
Occupancy Level		Airport Volume	
4th Quarter 2019 81.3% ↑ 1.3%		4th Quarter 2019 14,207,188 ↑ 5.2%	Rolling 12 Month Total (Jan '19 - Dec '19) 56,386,348 ↑ 3.9%

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- Room Taxes
- Visitor Volume
- Occupancy Rates
- Gaming revenue and more
- Data shown for the most recent quarter, the last 12 months, over time and more



To toggle between stats, click the arrow in the top left corner.

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