



Cowboy Country

VISITOR PROFILE

2019 - 2023



NEVADA COMMISSION ON TOURISM

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Joe Lombardo

LT. GOVERNOR • CHAIR

Stavros Anthony

DIRECTOR

Brenda Scolari

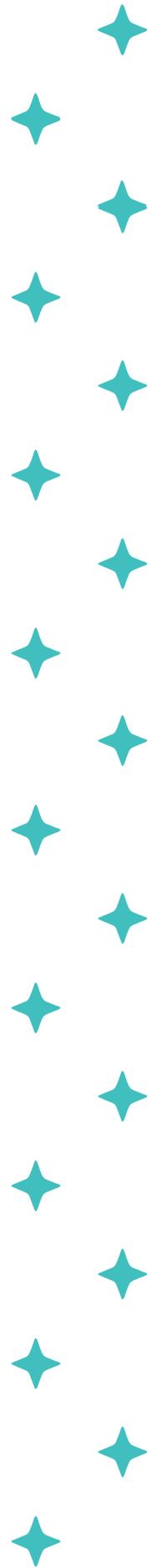
CEO

Rafael Villanueva

RESEARCH & ANALYSIS

Kyle Shulz, Gabriel Mortensen

Data Source: TNS Travels America / TravelTrak America



METHODOLOGY OVERVIEW

The 2023 Nevada Visitor Profile and Territory Profiles were compiled using data collected from the Travel Nevada Domestic Visitor Profile Survey administered monthly to qualified respondents.

Respondents are deemed qualified based on their responses to Omnitrak's monthly national TravelTrak America survey. Omnitrak has partnered with a single U.S. based managed panel provider to administer the monthly TravelTrakAmerica survey, as well as the follow-up Travel Nevada Visitor Profile Survey.

SURVEY QUALIFICATIONS

Each month, TravelTrakAmerica survey invitations are sent to a nationally representative sample of U.S. households based on the most recent U.S. census data for region, state, age, and household income.

Respondents are initially asked a series of questions (e.g., demographics, perceptions, past year travel, etc.) to determine whether they are a non-traveler or traveler. "Travelers" are defined as having taken one or more trips more than 50 miles from home (each way, excluding commuters) during the past 12 months.

Each month more than 9,000 respondents qualify as U.S. travelers. A wide variety of information (e.g., travel motivations, travel intent, vacation availability, trip timing, etc.) is collected from these travelers. Additional detailed information about trips taken during the past month is collected from approximately 4,000 travelers who took at least one trip in the prior month.

To qualify for the Travel Nevada monthly survey, respondents must have taken a leisure trip to or within Nevada during the previous month. Qualified respondents who took more than one Nevada leisure trip in the month prior are instructed to provide information about their most recent Nevada leisure trip.

WEIGHTING

Respondents are assigned a weight based on their demographic representation among the U.S. population. The demographic weight is based on all panelists responding to the qualification questions (i.e., travelers and non-travelers).

When the demo weight is applied, results generated reflect all travel by a demographically representative sample of the U.S. population. Applying the demo weight generates results weighted to ensure the respondent sample is demographically representative of the U.S. population.

NEVADA TERRITORY QUALIFICATIONS

To ensure the survey captures all Nevada destinations visited to the best of its ability, respondents are deemed a territory visitor based on their responses to questions asking what city they visited, events attended, and specific locations/attractions visited. If a respondent answers that they have been to a county, city, area, and/or participated in an event within a territory, then they are marked as a visitor to that territory.

Age



Annual Household Income



Ethnicity

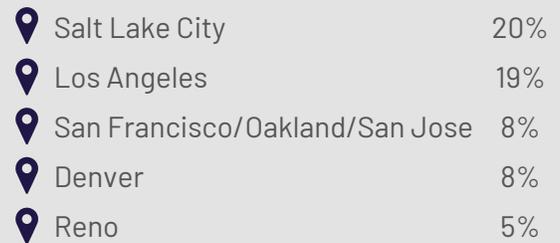


Day Trips



VISITOR SNAPSHOT

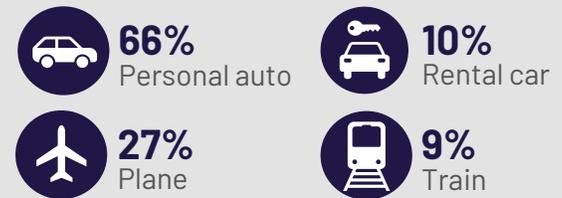
Top Origin Markets



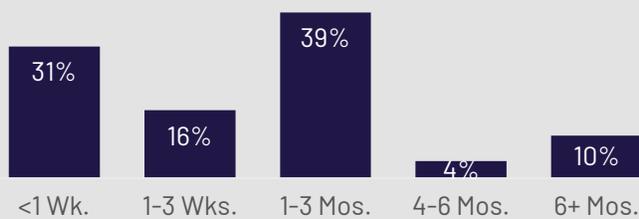
Top Primary Purposes of Nevada Trip

- 1 Visit friends and/or relatives - 23%
- 2 Vacation - 20%
- 3 Gaming - 16%
- 4 Entertainment - 14%
- 5 Road Trip - 11%

Top Travel Modes to Nevada



Advance Decision for Nevada Trip



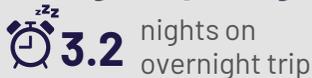
Average Nevada Trip Rating



Average Likelihood to Return



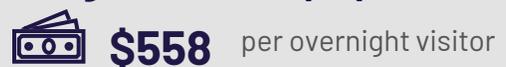
Average Trip Length



Average Party Size



Average Nevada Trip Spend



Cowboy Country Territory	2023	2022	2021	2020	2019
1) Average Non-Gaming & Gaming Trip Expenditure per Overnight Visitor	\$558	\$468	\$482	\$422	\$447
2) Average Non-Gaming & Gaming Daily Expenditure per Overnight Visitor	\$150	\$126	\$132	\$130	\$142
3) Average Travel Party Size	2.66	2.74	3.02	3.26	3.02
4) Average Length (Nights) per Overnight Trip	3.22	2.96	3.37	2.74	3.49
5) Percentage of Visits That Were Day Trips	19.7%	26.6%	32.3%	47.1%	24.3%
6) Average Rating of Trip to Nevada (Scale of 1 to 5)	4.27	4.25	4.22	4.38	4.37
7) Likelihood of Returning to Nevada Within the Next Two Years (Scale of 1 to 5)	4.22	4.2	4.19	4.24	4.32
8) What is the breakdown of advanced planning to make the decision to take a trip to this destination?					
same day	11.7%	2.8%	15.5%	20.1%	6.1%
2 - 6 days	19.1%	20.7%	24.4%	21.8%	24.5%
1 - 3 weeks	16.3%	24.6%	32.9%	26.0%	15.5%
1 - 3 months	38.7%	33.9%	14.6%	20.8%	35.0%
4 - 6 months	4.0%	7.5%	10.1%	5.3%	13.2%
more than 6 months	10.2%	10.5%	2.4%	6.0%	5.6%
9) Primary Source Used to Inspire Travel to the Destination					
own experience in nevada	35.7%	20.5%	27.0%	16.9%	-
other source	9.0%	19.8%	13.4%	7.6%	-
other websites	8.2%	5.5%	1.5%	0.0%	-
online travel agent (i.e. expedia, orbitz, etc.)	7.5%	4.7%	4.8%	1.9%	-
instagram	5.7%	4.5%	1.9%	5.8%	-
10) Primary Source Used to Plan Travel to the Destination					
own experience in nevada	24.5%	16.8%	26.3%	18.1%	-
online travel agent (i.e. expedia, orbitz, etc.)	12.5%	11.7%	4.3%	4.2%	-
other websites	9.0%	8.2%	0.0%	0.0%	-
other source	8.6%	18.7%	14.7%	10.3%	-
friends/relatives/other word of mouth	8.0%	1.8%	11.4%	13.5%	-
11) Primary Source Used to Book Travel to the Destination					
own experience in nevada	25.4%	18.0%	22.2%	14.9%	-
online travel agent (i.e. expedia, orbitz, etc.)	17.4%	12.5%	5.6%	3.9%	-
other source	17.3%	17.7%	15.8%	10.5%	-

Cowboy Country Territory	2023	2022	2021	2020	2019
hotel website	11.6%	13.1%	11.8%	15.6%	-
other websites	6.7%	8.2%	2.2%	0.9%	-
12) Top Nevada Activities and Attractions Experienced (Entire Trip)					
dining and restaurants	49.7%	36.5%	39.1%	34.3%	33.1%
casino-resorts	48.5%	45.0%	46.7%	32.4%	42.8%
gaming	41.6%	26.9%	28.5%	18.1%	17.1%
shopping-malls & outlets	22.3%	18.9%	24.1%	9.1%	-
road trip/scenic drive	20.6%	28.2%	26.6%	10.7%	-
historic sites	20.2%	16.1%	29.6%	6.4%	-
parks/recreation areas	19.3%	14.1%	17.5%	0.0%	15.3%
family/friends event/reunion	18.6%	17.9%	23.7%	29.7%	9.5%
visit friends/relatives	17.7%	22.1%	20.0%	20.3%	6.5%
live performance – concert or show	17.6%	15.6%	15.1%	6.1%	12.0%
13) Likelihood of Recommending Nevada as a Vacation Destination to Friends/Family					
not at all likely	0.0%	3.0%	1.4%	2.0%	1.2%
not very likely	9.6%	8.2%	7.1%	4.1%	7.1%
somewhat likely	23.0%	18.7%	13.4%	24.0%	14.2%
very likely	19.3%	23.6%	31.9%	23.4%	19.1%
extremely likely	48.1%	46.5%	46.1%	46.5%	58.3%
14) Top Five Primary Purposes for the Trip to Nevada					
visit friends or relatives	22.6%	20.0%	28.4%	19.9%	28.1%
vacation	19.6%	18.7%	12.1%	27.1%	21.8%
gaming	16.1%	18.6%	18.9%	10.9%	17.5%
entertainment	14.5%	10.5%	5.0%	13.1%	9.7%
road trip	10.7%	12.7%	4.3%	3.9%	-
15) Top Five Metropolitan Areas of Origin					
salt lake city	20.3%	19.3%	32.0%	16.2%	15.0%
los angeles	19.0%	6.2%	9.4%	17.7%	16.5%
san francisco-oakland-san jose	8.0%	13.0%	8.3%	0.0%	5.9%
denver	7.6%	0.0%	0.0%	0.0%	1.0%

Cowboy Country Territory	2023	2022	2021	2020	2019
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reno	5.5%	2.3%	4.2%	3.3%	2.5%
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16) Top Five Places Visitors Are Staying (Entire Trip)					
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casino hotel/motel	66.2%	38.0%	72.6%	35.7%	39.9%
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friends or relatives residence	21.4%	12.3%	3.4%	16.3%	27.3%
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non-casino hotel/motel	7.9%	17.9%	15.5%	21.8%	16.9%
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bed & breakfast or inn	2.5%	2.5%	0.6%	4.8%	3.2%
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other accommodations	1.2%	4.6%	0.0%	1.6%	1.8%
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17) Annual Household Income Breakdown of Visitors					
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under \$50,000	14.7%	22.2%	26.1%	22.2%	17.4%
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\$50,000 - \$74,999	20.4%	19.1%	14.0%	14.2%	24.7%
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\$75,000 - \$99,999	10.3%	12.6%	20.6%	26.5%	17.8%
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\$100,000 - \$124,999	15.5%	14.1%	19.6%	10.6%	15.6%
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\$125,000 - \$149,999	22.3%	17.5%	7.2%	9.2%	9.5%
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\$150,000 or more	16.8%	14.4%	12.5%	17.4%	15.0%
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18) Top Five Modes of Travel to Nevada					
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personal auto	65.8%	64.9%	74.0%	56.3%	-
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plane	26.8%	25.4%	23.6%	25.4%	-
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rental car	10.0%	21.9%	14.5%	19.9%	-
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train	9.2%	10.6%	8.5%	14.1%	-
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bus	4.6%	9.6%	5.2%	12.1%	-
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19) Top Five Modes of Travel Within Nevada					
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personal auto	63.6%	69.8%	74.6%	60.7%	-
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rental car	26.5%	19.6%	18.6%	26.5%	-
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shared economy(uber, lyft, etc.)	14.0%	12.0%	7.3%	8.4%	-
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bus	13.1%	11.9%	10.7%	13.6%	-
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hotel/motel shuttle	5.2%	7.5%	9.9%	11.4%	-
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20) Ethnicity Breakdown of Visitors					
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white	68.4%	75.2%	85.6%	88.3%	76.8%
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black/african american	19.0%	6.0%	3.0%	2.1%	10.6%
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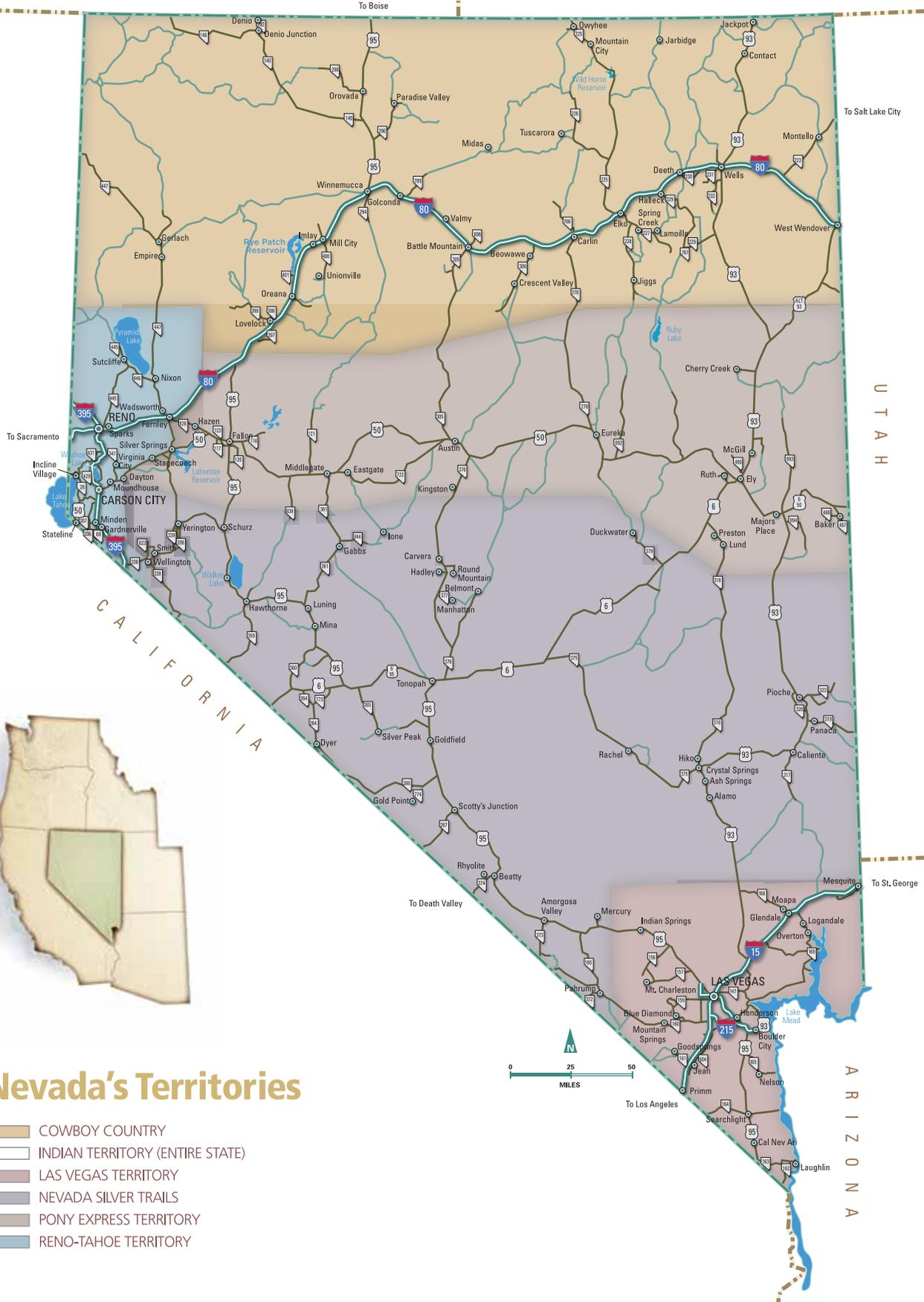
hispanic	15.8%	16.4%	12.8%	11.2%	9.1%
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Cowboy Country Territory	2023	2022	2021	2020	2019
<i>other</i>	8.4%	6.7%	2.7%	4.3%	2.3%
<i>asian or pacific islander</i>	4.2%	12.1%	4.1%	4.6%	6.0%
<i>american indian, aleut eskimo</i>	0.0%	0.0%	3.6%	0.8%	1.5%
<i>prefer not to answer</i>	0.0%	0.0%	1.1%	0.0%	2.8%
21) Age Breakdown of Visitors					
18-24	11.8%	5.8%	10.5%	4.4%	6.3%
25-34	26.2%	23.0%	33.3%	25.3%	40.0%
35-44	25.6%	23.7%	27.8%	39.7%	21.2%
45-54	6.2%	24.7%	11.5%	13.4%	8.8%
55-64	10.0%	13.9%	10.2%	7.6%	13.1%
65-74	15.4%	8.9%	6.6%	9.6%	10.2%
75+	4.8%	0.0%	0.0%	0.0%	0.4%
Sample Size	61*	81*	80*	90*	143*

* Small sample size, exercise caution when using data.

OREGON

IDAHO



Nevada's Territories

- COWBOY COUNTRY
- INDIAN TERRITORY (ENTIRE STATE)
- LAS VEGAS TERRITORY
- NEVADA SILVER TRAILS
- PONY EXPRESS TERRITORY
- RENO-TAHOE TERRITORY