



COWBOY COUNTRY

VISITOR PROFILE

2021 - 2024



NEVADA COMMISSION ON TOURISM

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Data Source: TNS Travels America / TravelTrak America



METHODOLOGY OVERVIEW

The 2024 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. It should be noted that respondents can be marked as visitors to multiple territories. For example, a respondent who noted travel to Las Vegas and Tonopah would be marked as a visitor to both the Las Vegas and Nevada Silver Trails territories.

It should also be noted that, to enhance sample sizes, profiles for Nevada’s three rural territories are based on two-year aggregated data. For example, columns labeled “2024/2023” reflect combined responses from calendar years 2023 and 2024, representing a two-year aggregate for these territories.

METHODOLOGICAL NOTE

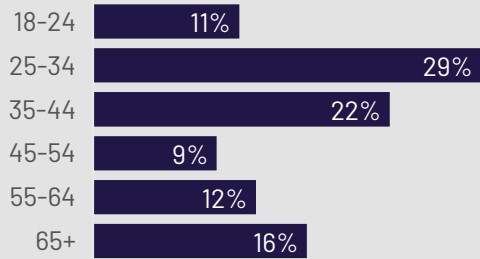
Q16 in each territory profile outlines the proportion of visitor nights spent in various property types. Across territories, the percentage of nights attributed to “casino hotel/motel” accommodations declined by seemingly wide margins from the previous year.

This proportion is derived by dividing the average number of nights spent in a specific accommodation type by the average length of stay among overnight visitors. Because the output is calculation-based, even small changes in the input metrics can lead to seemingly significant shifts in the resulting percentage.

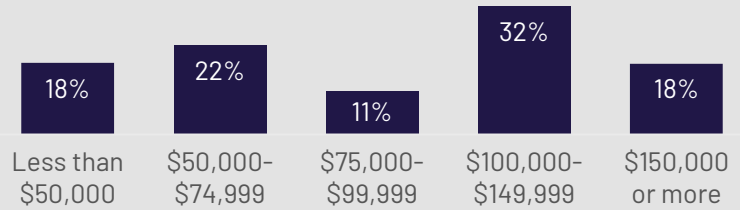
For example, statewide data shows that in 2023, the average length of stay among overnight visitors was 3.46 nights, with 2.31 nights attributed to casino hotel/motel stays—yielding a proportion of 66.8%. In 2024, although the average length of stay increased to 3.84 nights, the average attributed to casino hotel/motel stays declined slightly to 2.17 nights, resulting in a lower proportion of 56.5%.

It’s worth noting that territories with smaller sample sizes are more susceptible to year-to-year fluctuations. Additionally, while not explicitly stated in the profiles, the overall percentage of travelers who reported staying at a casino hotel/motel at any point during their trip remained relatively stable in 2024.

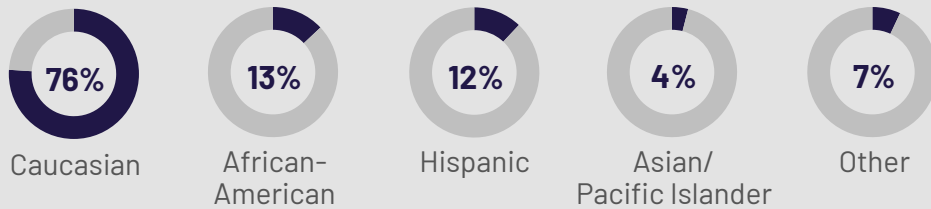
Age



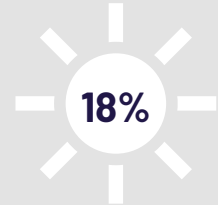
Annual Household Income



Ethnicity

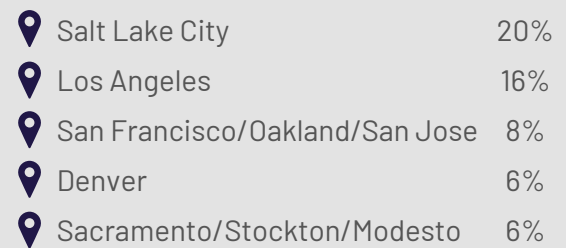


Day Trips



VISITOR SNAPSHOT

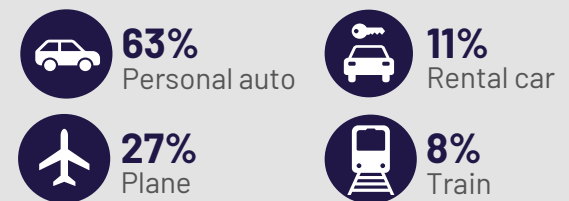
Top Origin Markets



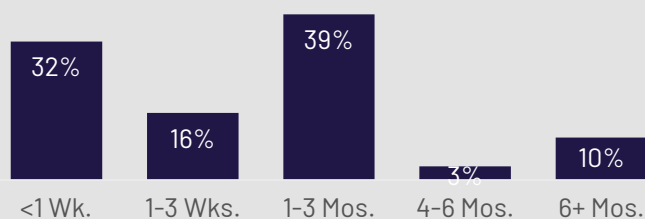
Top Primary Purposes of Nevada Trip

- 1 Visit friends and/or relatives - 24%
- 2 Vacation - 21%
- 3 Gaming - 14%
- 4 Entertainment - 13%
- 5 Road Trip - 8%

Top Travel Modes to Nevada



Advance Decision for Nevada Trip



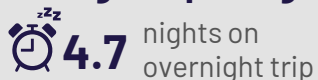
Average Nevada Trip Rating



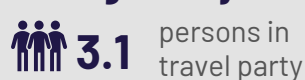
Average Likelihood to Return



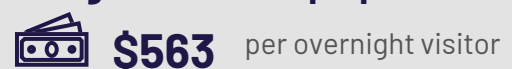
Average Trip Length



Average Party Size



Average Nevada Trip Spend



Cowboy Country Territory	2024/23	2023/22	2022/21	2021/20
1) Average Non-Gaming & Gaming Trip Expenditure per Overnight Visitor	\$563	\$509	\$475	\$454
2) Average Non-Gaming & Gaming Daily Expenditure per Overnight Visitor	\$148	\$138	\$121	\$125
3) Average Travel Party Size	3.14	2.71	2.88	3.15
4) Average Length (Nights) per Overnight Trip	4.65	3.08	3.16	3.08
5) Percentage of Visits That Were Day Trips	17.8%	23.6%	29.5%	40.1%
6) Average Rating of Trip to Nevada (Scale of 1 to 5)	4.27	4.26	4.24	4.3
7) Likelihood of Returning to Nevada Within the Next Two Years (Scale of 1 to 5)	4.11	4.21	4.19	4.22
8) What is the breakdown of advanced planning to make the decision to take a trip to this destination?				
same day	11.1%	6.6%	9.1%	17.9%
2 - 6 days	21.3%	20.0%	22.6%	23.0%
1 - 3 weeks	15.7%	21.0%	28.8%	29.3%
1 - 3 months	38.8%	35.9%	24.3%	17.9%
4 - 6 months	3.2%	6.0%	8.8%	7.5%
more than 6 months	9.9%	10.3%	6.5%	4.3%
9) Primary Source Used to Inspire Travel to the Destination				
own experience in nevada	28.0%	27.0%	23.7%	21.7%
other source	9.5%	15.2%	16.6%	10.3%
friends/relatives/other word of mouth	8.2%	5.0%	8.3%	12.0%
online travel agent (e.g., expedia, trivago, booking.com, etc.)	8.1%	5.9%	4.7%	3.2%
search engine	5.9%	5.5%	5.5%	5.5%
10) Primary Source Used to Plan Travel to the Destination				
own experience in nevada	22.3%	20.1%	21.5%	22.0%
online travel agent (e.g., expedia, trivago, booking.com, etc.)	12.6%	12.1%	8.0%	4.2%
friends/relatives/other word of mouth	10.6%	4.5%	6.6%	12.5%
other source	9.3%	14.3%	16.7%	12.4%
search engine	6.4%	8.3%	11.7%	6.2%
11) Primary Source Used to Book Travel to the Destination				
own experience in nevada	20.8%	21.2%	20.1%	18.3%
hotel website	15.2%	12.5%	12.5%	13.8%

Cowboy Country Territory	2024/23	2023/22	2022/21	2021/20
other source	14.0%	17.5%	16.8%	13.0%
online travel agent (e.g., expedia, trivago, booking.com, etc.)	12.7%	14.6%	9.1%	4.7%
tv/streaming program or show	5.5%	7.2%	4.4%	1.7%
12) Top Nevada Activities and Attractions Experienced (Entire Trip)				
casino-resorts	48.9%	46.5%	45.9%	39.2%
dining and restaurants	44.1%	42.2%	37.8%	36.6%
gaming	35.0%	33.2%	27.7%	23.0%
historic sites	22.9%	17.9%	22.8%	26.1%
road trip/scenic drive	21.0%	24.9%	27.4%	20.1%
family/friends event/reunion	20.6%	18.2%	20.8%	26.9%
shopping-malls & outlets	19.4%	20.4%	21.5%	22.1%
visit friends/relatives	18.6%	20.2%	21.0%	14.0%
ghost towns	17.6%	9.3%	10.1%	12.2%
museums	16.6%	17.6%	13.8%	9.5%
13) Likelihood of Recommending Nevada as a Vacation Destination to Friends/Family				
not at all likely	2.6%	1.7%	2.2%	1.7%
not very likely	6.9%	8.8%	7.7%	5.6%
somewhat likely	21.8%	20.6%	16.1%	19.0%
very likely	26.2%	21.7%	27.7%	27.4%
extremely likely	42.4%	47.2%	46.3%	46.3%
14) Top Five Primary Purposes for the Trip to Nevada				
visit friends or relatives	24.4%	21.1%	24.2%	23.9%
vacation	21.5%	19.1%	15.4%	20.0%
gaming	14.3%	17.5%	18.8%	14.7%
entertainment	12.5%	12.2%	7.8%	9.3%
road trip	7.7%	11.9%	8.5%	4.1%
15) Top Five Metropolitan Areas of Origin				
salt lake city	20.1%	19.8%	25.6%	23.6%
los angeles	15.8%	11.7%	7.8%	13.8%
san francisco-oakland-san jose	8.5%	10.8%	10.6%	3.9%

Cowboy Country Territory	2024/23	2023/22	2022/21	2021/20
denver	6.3%	3.3%	-	-
sacramento-stockton-modesto	5.7%	4.6%	8.2%	7.8%
16) Top Five Places Visitors Are Staying (Entire Trip)				
casino hotel/motel	37.8%	51.7%	55.9%	57.0%
friends or relatives residence	36.0%	16.8%	7.9%	9.0%
non-casino hotel/motel	17.8%	13.0%	16.3%	17.7%
bed & breakfast or inn	3.5%	2.5%	1.5%	2.3%
vacation home or rental unit	2.0%	5.1%	6.9%	4.3%
17) Annual Household Income Breakdown of Visitors				
under \$50,000	17.7%	19.0%	24.1%	24.0%
\$50,000 - \$74,999	22.2%	19.7%	16.6%	14.1%
\$75,000 - \$99,999	10.8%	11.6%	16.6%	23.7%
\$100,000 - \$124,999	16.5%	14.7%	16.9%	14.9%
\$125,000 - \$149,999	15.2%	19.6%	12.4%	8.3%
\$150,000 or more	17.6%	15.5%	13.5%	15.1%
18) Top Five Modes of Travel to Nevada				
personal auto	62.7%	65.3%	69.4%	64.7%
plane	27.1%	26.0%	24.5%	24.5%
rental car	11.3%	16.8%	18.2%	17.4%
train	8.5%	10.0%	9.5%	11.5%
bus	6.3%	7.5%	7.4%	8.8%
19) Top Five Modes of Travel Within Nevada				
personal auto	60.8%	67.1%	72.2%	67.3%
rental car	27.3%	22.6%	19.1%	22.8%
ride share (e.g., uber, lyft, etc.)	12.2%	12.9%	9.7%	7.9%
bus	9.2%	12.4%	11.3%	12.2%
hotel/motel shuttle	5.8%	6.5%	8.7%	10.7%
20) Ethnicity Breakdown of Visitors				
white	76.2%	72.2%	80.3%	87.0%
black/african american	13.0%	11.6%	4.5%	2.5%

Cowboy Country Territory	2024/23	2023/22	2022/21	2021/20
hispanic	12.3%	16.2%	14.6%	12.0%
other	7.3%	7.4%	4.7%	3.5%
asian or pacific islander	3.6%	8.7%	8.2%	4.4%
american indian, aleut eskimo	-	-	1.8%	2.1%
prefer not to answer	-	-	0.5%	0.5%
21) Age Breakdown of Visitors				
18-24	11.0%	8.4%	8.2%	7.3%
25-34	29.2%	24.3%	28.1%	29.1%
35-44	22.3%	24.5%	25.7%	34.1%
45-54	9.3%	16.7%	18.1%	12.5%
55-64	12.2%	12.2%	12.1%	8.9%
65-74	13.4%	11.7%	7.8%	8.2%
75+	2.6%	2.1%	-	-
Sample Size	112*	142*	161	170

* Small smaple size, exercise caution when using data.

O R E G O N

I D A H O

U T A H

C A L I F O R N I A

A R I Z O N A

Nevada's Territories

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

