



COWBOY COUNTRY

VISITOR PROFILE

2021 - 2025



NEVADA COMMISSION ON TOURISM

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Data Source: TNS Travels America / TravelTrak America



METHODOLOGY OVERVIEW

The 2025 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 “2025/2024” reflect combined responses from calendar years 2024 and 2025, representing a two-year aggregate for these territories.

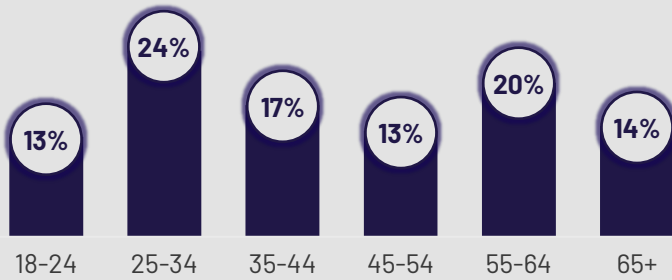
METHODOLOGICAL NOTE

Q2 in each territory profile notes that the average daily expenditure per overnight visitor is revised. This reflects a change from reporting in previous years where the expenditure figure was based on the number of nights spent in the state during the reported trip while the current figure is based on the number of days.

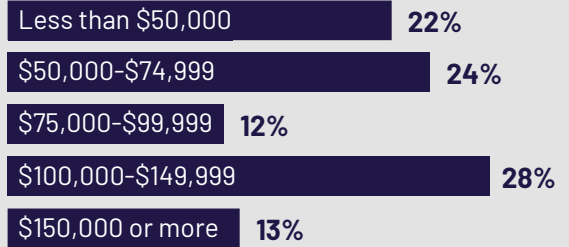
Additionally, Q16 in each territory profile outlines the proportion of visitor nights spent in various property types. Across some rural territories, the percentage of nights attributed to “casino hotel/motel” accommodations declined by seemingly wide margins from the previous year.

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. It’s worth noting that territories with smaller sample sizes are more susceptible to year-to-year fluctuations.

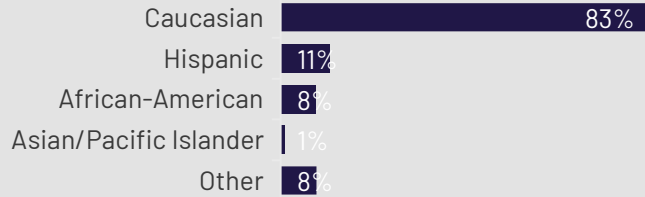
Age



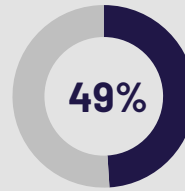
Annual Household Income



Ethnicity



Children in HH

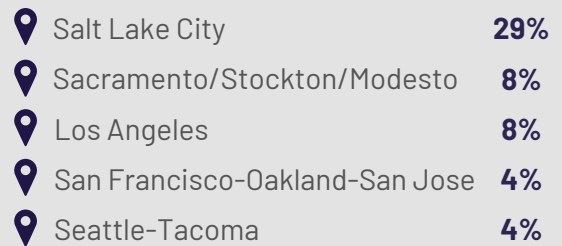


Day Trips



VISITOR SNAPSHOT

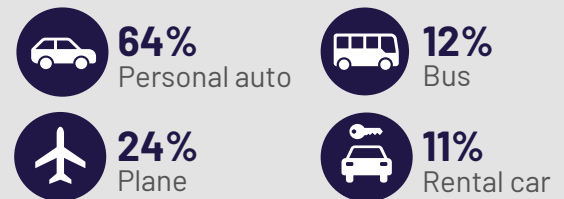
Top Origin Markets



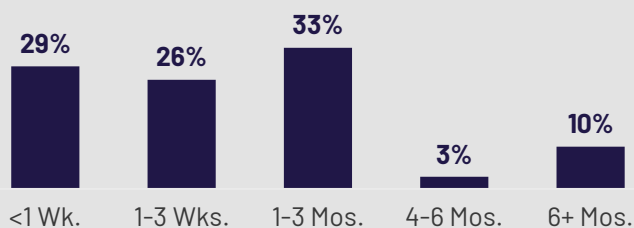
Top Primary Purposes of Nevada Trip

- 1 Visit friends and/or relatives - 25%
- 2 Gaming - 21%
- 3 Vacation - 18%
- 4 Entertainment - 11%
- 5 Special event/festival - 7%

Top Travel Modes to Nevada



Advance Decision for Nevada Trip



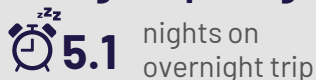
Average Nevada Trip Rating



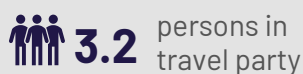
Average Likelihood to Return



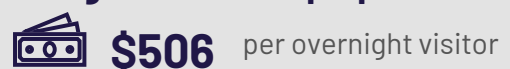
Average Trip Length



Average Party Size



Average Nevada Trip Spend



Cowboy Country Territory

2025/24

2024/23

2023/22

2022/21

1) Average Non-Gaming & Gaming Trip Expenditure per Overnight Visitor

\$506

\$563

\$509

\$475

2) Average Non-Gaming & Gaming Daily Expenditure per Overnight Visitor (revised)

\$145

\$152

\$137

\$129

3) Average Travel Party Size

3.19

3.14

2.71

2.88

4) Average Length (Nights) per Overnight Trip

5.1

4.65

3.08

3.16

5) Percentage of Visits That Were Day Trips

19.3%

17.8%

23.6%

29.5%

6) Average Rating of Trip to Nevada (Scale of 1 to 5)

4.3

4.27

4.26

4.24

7) Likelihood of Returning to Nevada Within the Next Two Years (Scale of 1 to 5)

4.15

4.11

4.21

4.19

8) What is the breakdown of advanced planning to make the decision to take a trip to this destination?

same day

9.0%

11.1%

6.6%

9.1%

2 - 6 days

19.7%

21.3%

20.0%

22.6%

1 - 3 weeks

25.5%

15.7%

21.0%

28.8%

1 - 3 months

33.0%

38.8%

35.9%

24.3%

4 - 6 months

2.8%

3.2%

6.0%

8.8%

more than 6 months

9.9%

9.9%

10.3%

6.5%

9) Primary Source Used to Inspire Travel to the Destination

own experience in nevada

21.8%

28.0%

27.0%

23.7%

other source

14.8%

9.5%

15.2%

16.6%

hotel website

11.0%

3.7%

5.0%

7.5%

friends/relatives/other word of mouth

10.2%

8.2%

5.0%

8.3%

search engine

7.9%

5.9%

5.5%

5.5%

10) Primary Source Used to Plan Travel to the Destination

own experience in nevada

23.5%

22.3%

20.1%

21.5%

other source

13.1%

9.3%

14.3%

16.7%

friends/relatives/other word of mouth

10.2%

10.6%

4.5%

6.6%

search engine

7.4%

6.4%

8.3%

11.7%

online travel agency (i.e. expedia, trivago, booking.com, etc.)

6.6%

12.6%

12.1%

8.0%

11) Primary Source Used to Book Travel to the Destination

own experience in nevada

21.1%

20.8%

21.2%

20.1%

hotel website

13.7%

15.2%

12.5%

12.5%

Cowboy Country Territory	2025/24	2024/23	2023/22	2022/21
<i>other source</i>	11.8%	14.0%	17.5%	16.8%
<i>online travel agency (i.e. expedia, trivago, booking.com, etc.)</i>	8.2%	12.7%	14.6%	9.1%
<i>friends/relatives/other word of mouth</i>	8.0%	2.9%	1.8%	4.9%
12) Top Nevada Activities and Attractions Experienced (Entire Trip)				
<i>casino-resorts</i>	49.1%	48.9%	46.5%	45.9%
<i>dining and restaurants</i>	40.4%	44.1%	42.2%	37.8%
<i>historic sites</i>	23.0%	22.9%	17.9%	22.8%
<i>gaming</i>	23.0%	35.0%	33.2%	27.7%
<i>family/friends event/reunion</i>	21.3%	20.6%	18.2%	20.8%
<i>ghost towns</i>	18.2%	17.6%	9.3%	10.1%
<i>road trip/scenic drive</i>	17.7%	21.0%	24.9%	27.4%
<i>special events/festival</i>	16.0%	12.1%	14.7%	9.7%
<i>hiking</i>	15.8%	15.6%	15.2%	13.6%
<i>agricultural tourism</i>	15.3%	6.8%	-	-
13) Likelihood of Recommending Nevada as a Vacation Destination to Friends/Family				
<i>not at all likely</i>	2.7%	2.6%	1.7%	2.2%
<i>not very likely</i>	4.1%	6.9%	8.8%	7.7%
<i>somewhat likely</i>	19.9%	21.8%	20.6%	16.1%
<i>very likely</i>	34.1%	26.2%	21.7%	27.7%
<i>extremely likely</i>	39.2%	42.4%	47.2%	46.3%
14) Top Five Primary Purposes for the Trip to Nevada				
<i>visit friends or relatives</i>	24.7%	24.4%	21.1%	24.2%
<i>gaming</i>	20.6%	14.3%	17.5%	18.8%
<i>vacation</i>	18.1%	21.5%	19.1%	15.4%
<i>entertainment</i>	11.0%	12.5%	12.2%	7.8%
<i>special event/festival (e.g. music festival, balloon race, etc.)</i>	6.6%	5.4%	5.1%	5.4%
15) Top Five Metropolitan Areas of Origin				
<i>salt lake city</i>	29.2%	20.1%	19.8%	25.6%
<i>sacramento-stockton-modesto</i>	7.9%	5.7%	4.6%	8.2%
<i>los angeles</i>	7.7%	15.8%	11.7%	7.8%

Cowboy Country Territory

2025/24

2024/23

2023/22

2022/21

san francisco-oakland-san jose

4.2%

8.5%

10.8%

10.6%

seattle-tacoma

3.8%

-

1.3%

1.1%

16) Top Five Places Visitors Are Staying (Entire Trip)

friends or relatives residence

31.7%

36.0%

16.8%

7.9%

casino hotel/motel

22.2%

37.8%

51.7%

55.9%

non-casino hotel/motel

21.0%

17.8%

13.0%

16.3%

undeveloped campgrounds/parks

14.6%

0.3%

4.0%

4.4%

bed & breakfast or inn

2.9%

3.5%

2.5%

1.5%

17) Annual Household Income Breakdown of Visitors

under \$50,000

22.1%

17.7%

19.0%

24.1%

\$50,000 - \$74,999

24.3%

22.2%

19.7%

16.6%

\$75,000 - \$99,999

12.5%

10.8%

11.6%

16.6%

\$100,000 - \$124,999

19.9%

16.5%

14.7%

16.9%

\$125,000 - \$149,999

7.9%

15.2%

19.6%

12.4%

\$150,000 or more

13.4%

17.6%

15.5%

13.5%

18) Top Five Modes of Travel to Nevada

personal auto

63.5%

62.7%

65.3%

69.4%

plane

23.7%

27.1%

26.0%

24.5%

bus

11.5%

6.3%

7.5%

7.4%

rental car

11.3%

11.3%

16.8%

18.2%

train

8.6%

8.5%

10.0%

9.5%

19) Top Five Modes of Travel Within Nevada

personal auto

65.3%

60.8%

67.1%

72.2%

rental car

23.6%

27.3%

22.6%

19.1%

taxi

8.8%

5.6%

8.0%

12.6%

bus

8.8%

9.2%

12.4%

11.3%

motorcycle

7.9%

4.8%

5.3%

8.1%

20) Ethnicity Breakdown of Visitors

white

82.8%

76.2%

72.2%

80.3%

hispanic

11.2%

12.3%

16.2%

14.6%

Cowboy Country Territory	2025/24	2024/23	2023/22	2022/21
<i>other</i>	8.3%	7.3%	7.4%	4.7%
<i>black/african american</i>	7.6%	13.0%	11.6%	4.5%
<i>asian or pacific islander</i>	1.3%	3.6%	8.7%	8.2%
<i>american indian, aleut eskimo</i>	-	-	-	1.8%
<i>prefer not to answer</i>	-	-	-	0.5%
21) Age Breakdown of Visitors				
18-24	12.7%	11.0%	8.4%	8.2%
25-34	23.6%	29.2%	24.3%	28.1%
35-44	16.7%	22.3%	24.5%	25.7%
45-54	13.4%	9.3%	16.7%	18.1%
55-64	19.5%	12.2%	12.2%	12.1%
65-74	12.7%	13.4%	11.7%	7.8%
75+	1.4%	2.6%	2.1%	-
Sample Size	109*	112*	142*	161

* Small sample size, exercise caution when using data.