

## Memorandum

**To:** Tina Quigley, General Manager of the Regional Transportation Commission of Southern Nevada  
**From:** Jeremy Aguero, Applied Analysis  
**Date:** January 6, 2016  
**Subject:** Analysis of Interstate 15 Traffic and Las Vegas Visitor Volume  
**CC:** Brian Gordon, Applied Analysis; Brian Haynes, Applied Analysis

During the December meeting of the Southern Nevada Tourism Infrastructure Committee, you asked about travel trends involving Las Vegas visitors and Interstate 15. This analysis seeks to answer your question as well as provide additional background information on the trends involving visitors from California.

### Analysis

The calculations included herein rely on the *2014 Las Vegas Visitor Profile Study* published by the Las Vegas Convention and Visitors Authority. Specifically, the figures used in this analysis are sourced to or calculated from the Airline Visitor Version of the survey (<http://www.lvcva.com/includes/content/images/media/docs/2014-LV-VPS-Air-vs-Ground.pdf>).

The table below illustrates the high percentage of visitors from California (nine out of 10) who drive to Las Vegas compared to other places of origin.

Las Vegas Visitors By Origin and Transportation Type				
	Air Travelers	% By Air	Ground Travelers	% By Ground
Las Vegas Visitors	17.3 million	42%	23.9 million	58%
United States	13.3 million	40%	20.0 million	60%
Western States	3.6 million	17%	17.9 million	83%
<b>California</b>	<b>1.2 million</b>	<b>9%</b>	<b>12.4 million</b>	<b>91%</b>
Southern California	690,900	6%	10.3 million	94%
Northern California	518,200	19%	2.1 million	81%
Arizona	172,700	7%	2.4 million	93%
Other Western States	2.2 million	40%	3.3 million	60%
International*	4.0 million	51%	3.8 million	49%

\* International visitors to Las Vegas, particularly those on extended trips to the U.S., frequently enter the country via major airports on the West Coast (e.g., Los Angeles and San Francisco) before traveling to Southern Nevada via car, bus, or other form of ground transportation.

Source: Las Vegas Convention and Visitors Authority

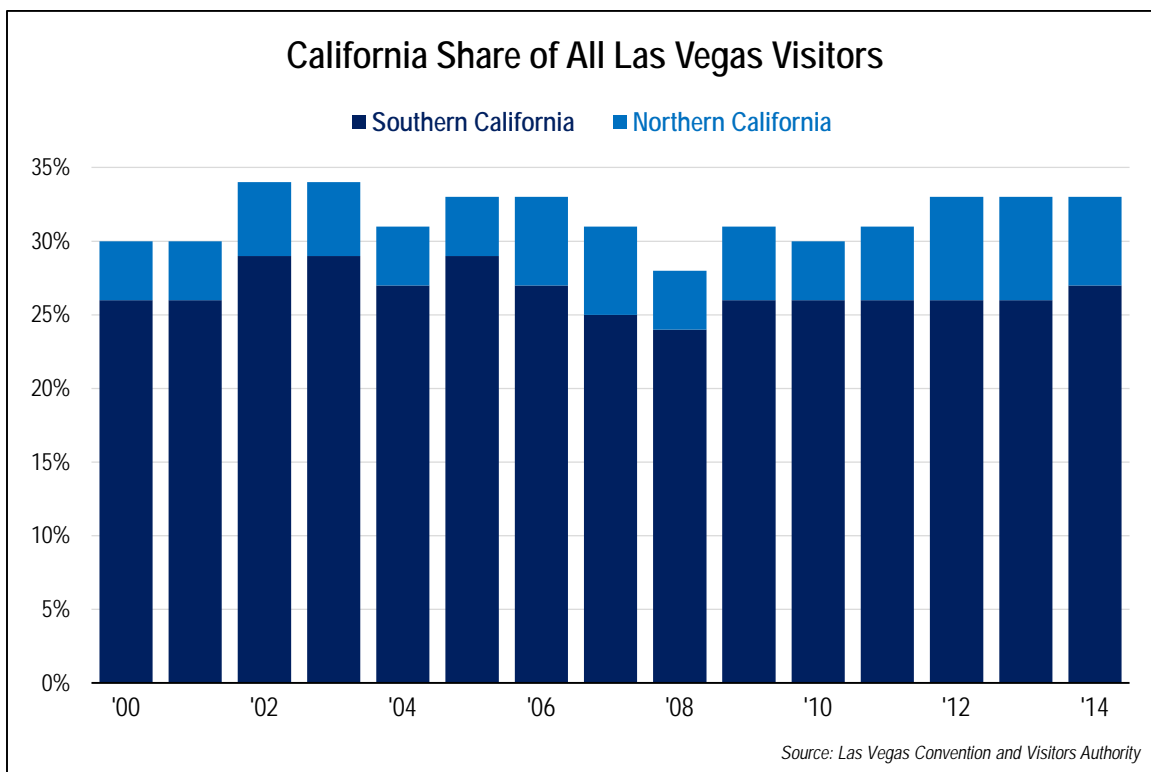
Ground transportation remains a popular mode of travel for visitors heading to Las Vegas, accounting for nearly six out of every 10 visitors. Californians using ground transportation make up 30 percent of all Las Vegas visitors.

Ground Travelers as Share of All Las Vegas Visitors		
	Ground Travelers	% of All Visitors
Las Vegas Visitors	23.9 million	58%
United States	20.0 million	49%
Western States	17.9 million	44%
<b>California</b>	<b>12.4 million</b>	<b>30%</b>
Southern California	10.3 million	25%
Northern California	2.1 million	5%
Arizona	2.4 million	6%
Other Western States	3.3 million	8%
International	3.8 million	9%

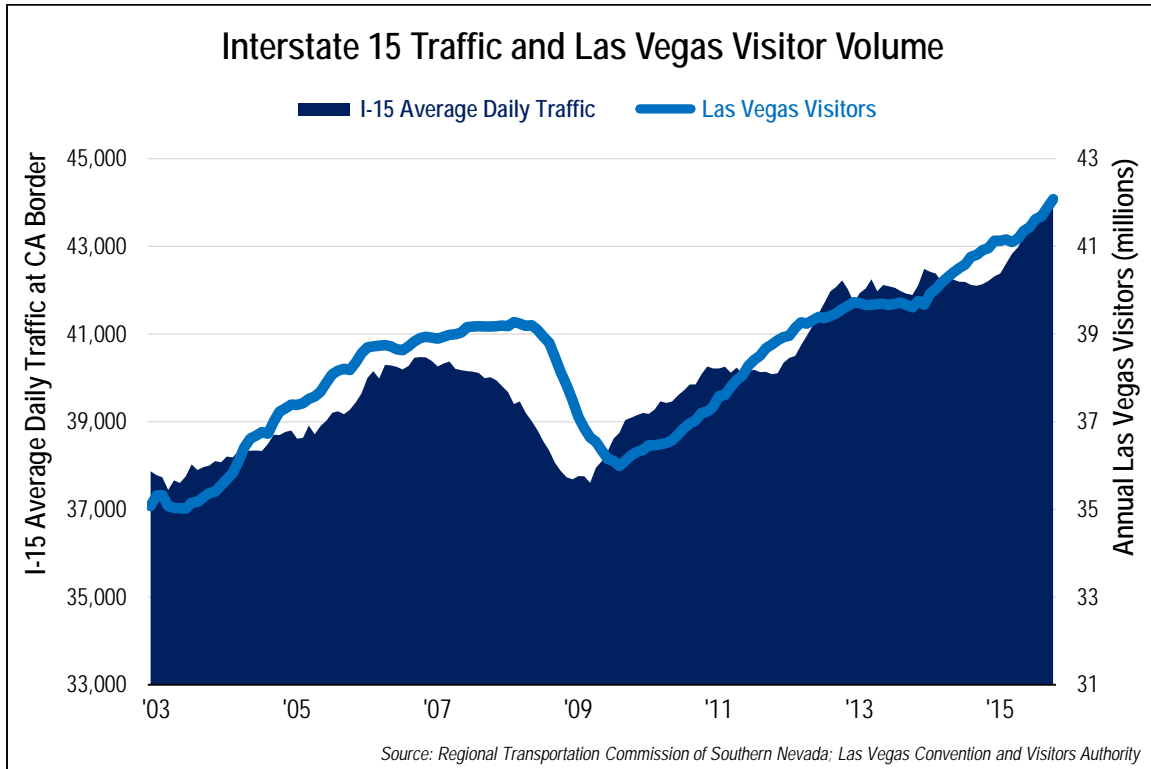
*Source: Las Vegas Convention and Visitors Authority*

### California Visitation Trend

Californians account for a large share of visitors to Las Vegas each year. Since 2000, about a third of all Las Vegas visitors hailed from California, with the majority of them originating in Southern California.



For more than a decade, there has been a strong correlation between daily traffic volume on Interstate 15 at the California border and Las Vegas visitor volume. The largest divergence in that trend occurred during the economic downturn, when traffic volume on I-15 began to fall earlier than visitor volume. That relationship is illustrated in the graph below.



### Summary

- Ground transportation remains the most popular mode of travel for visitors coming to Las Vegas, accounting for nearly six out of every 10 visitors. Ground transportation is popular with both domestic (60 percent) and international (49 percent) visitors.
- Ground transportation is preferred by visitors traveling from nearby Western states, who can reach Las Vegas via Interstate 15, U.S. 95, and U.S. 93. More than 80 percent of visitors from Western states drive rather than fly.
- Visitors from California overwhelmingly prefer ground transportation (91 percent). Californians account for two-thirds of visitors driving in from Western states and half of all visitors using ground transportation.
- Although specific numbers on how many Las Vegas visitors use I-15 are unavailable, drivers from California can be used to provide a reasonable approximation. Under that assumption, the southern leg of I-15 brings roughly 30 percent of visitors to Las Vegas.
- The significant influence of Californians on Las Vegas visitor volume is evident in the strong relationship between daily traffic volume on I-15 and overall visitation trends. The two numbers have climbed and fallen together for the past decade.