

**PHOENIX-MESA GATEWAY AIRPORT
VISITOR SURVEY**

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Prepared For
Phoenix-Mesa Gateway
Airport Authority

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INTRODUCTION

This study was commissioned by the Phoenix-Mesa Gateway Airport Authority. The primary purpose of this effort was to gather information about individuals who utilize the Phoenix-Mesa Gateway Airport. More specifically this research focused on the following issues:

- Visitor characteristic (age, income, employment status, place of residence)
- Trip characteristics (final destination, length of stay, city staying in, accommodations, party size, trip purpose, spending patterns)
- Activities participated in
- Reasons for selecting airport
- Personal interests
- Additional services needed
- Media preferences

This study is based on intercept interviews conducted at Phoenix-Mesa Gateway Airport with departing passengers. A total of 361 interviews were conducted during the interviewing cycle between December 10 and 27, 2015.

INTERCEPT SURVEY SCHEDULE

<u>DATE</u>	<u>DAY</u>	<u>HOURS</u>
12/10	Thursday	11:00 AM – 5:00 PM
12/11	Friday	6:00 am – 12:00 PM
12/13	Sunday	11:00 AM – 5:00 PM
12/16	Wednesday	6:00 AM – 12:00 PM
12/17	Thursday	11:00 AM – 5:00 PM
12/18	Friday	8:00 AM – 2:00 PM
12/21	Monday	9:00 AM – 3:00 PM
12/23	Wednesday	10:00 AM – 4:00 PM
12/27	Sunday	9:00 AM – 3:00 PM

The Behavior Research Center has presented all of the data germane to the basic research objectives of this project. However, if Authority management requires additional data retrieval or interpretation, we stand ready to provide such input.

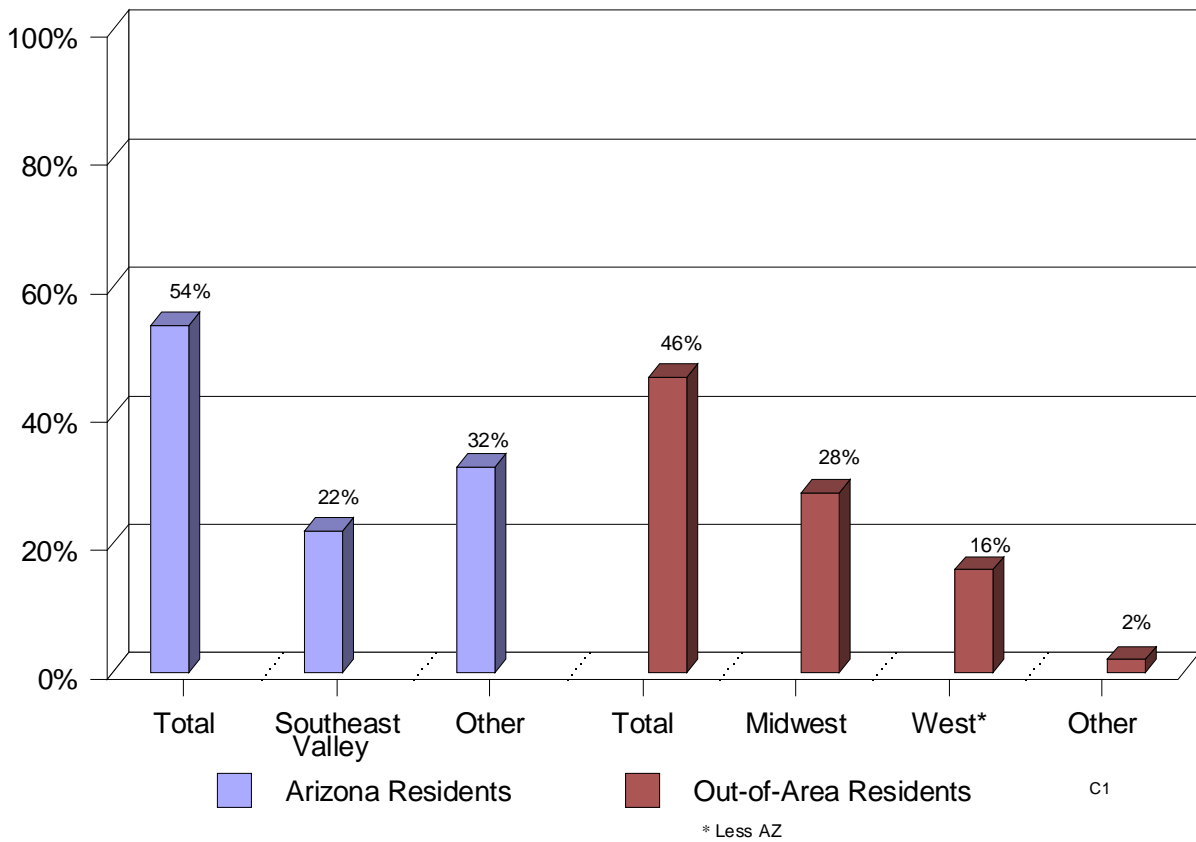
BEHAVIOR RESEARCH CENTER

SUMMARY OF THE FINDINGS

ORIGIN OF DEPARTING PASSENGERS (TABLE 1)

- Fifty-four percent of departing passengers were local Arizona residents, while 46 percent were out-of-area residents. The largest share of local residents were from the east valley (22%) and the largest share of out-of-area residents were from the Midwest (46%).

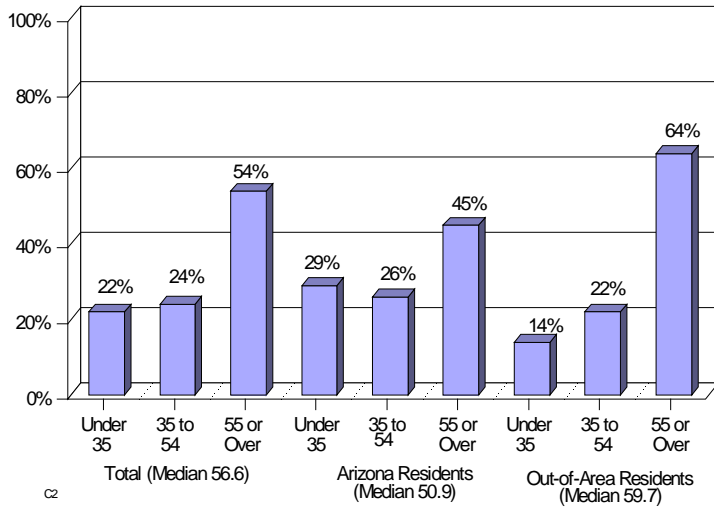
ORIGIN OF FLIERS



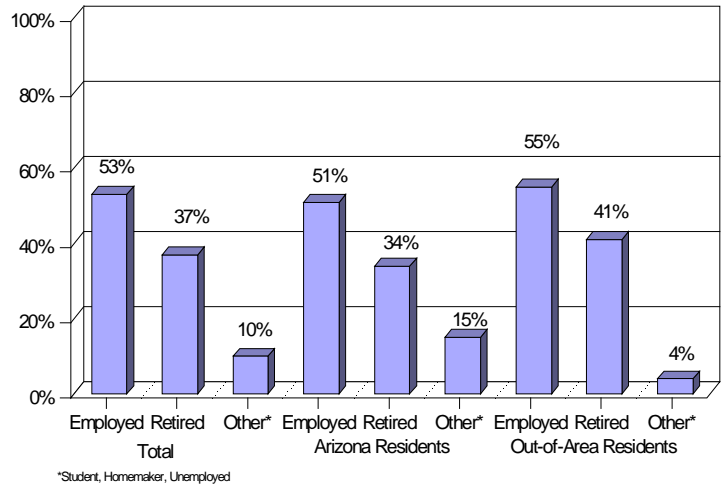
FLIER CHARACTERISTICS (TABLE 2)

- The typical flier was 57 years old with local fliers revealing a younger profile (51 years) than out-of-area fliers (60 years).
- Fifty-three percent of fliers were employed while 37percent were retired.
- The typical flier was affluent with a median annual income of \$77,100, a figure well above the national median of approximately \$50,000. Out-of-area fliers had particularly high median incomes of \$81,300.

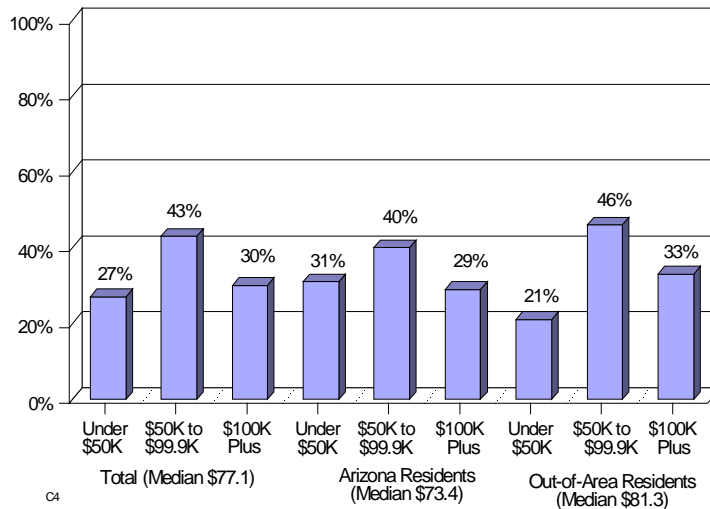
FLIER AGE



FLIER EMPLOYMENT STATUS

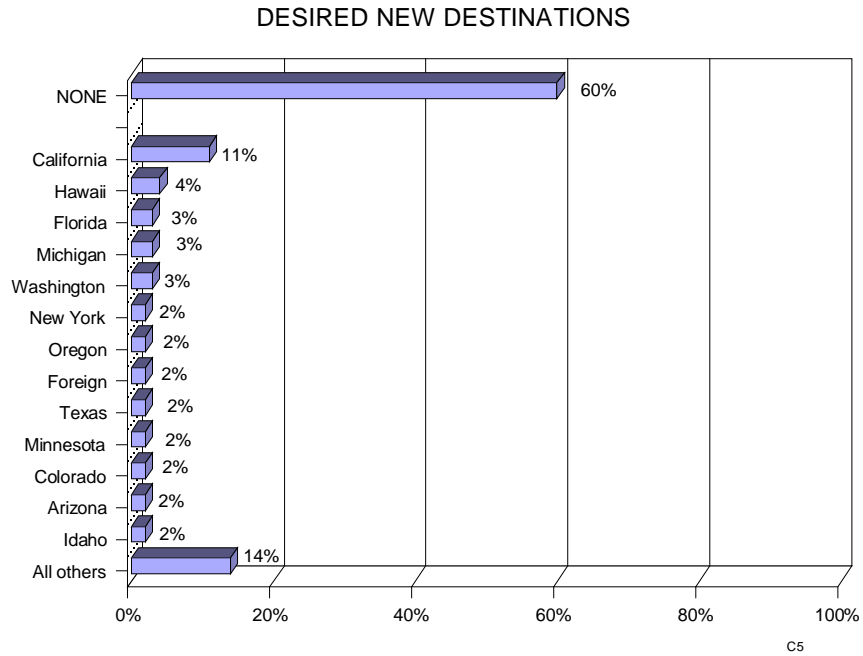


FLIERS INCOME



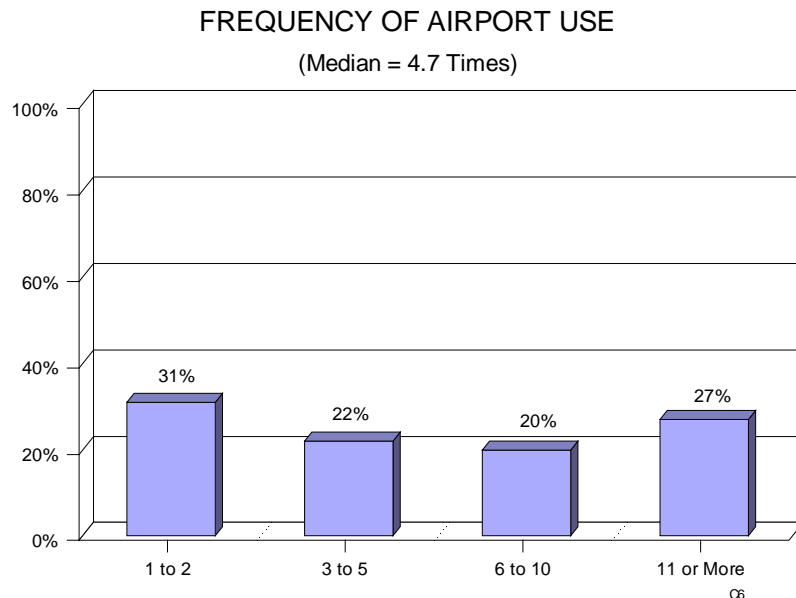
DESTINATIONS (TABLES 3-4)

- The most frequent destinations among fliers were California (12%), North Dakota (10%), South Dakota (10%), Iowa (10%) and Montana (9%).
- When fliers are asked to indicate what new destinations they would like to see serviced, 60 percent say none. Leading the list are California (11%) and Hawaii (4%).



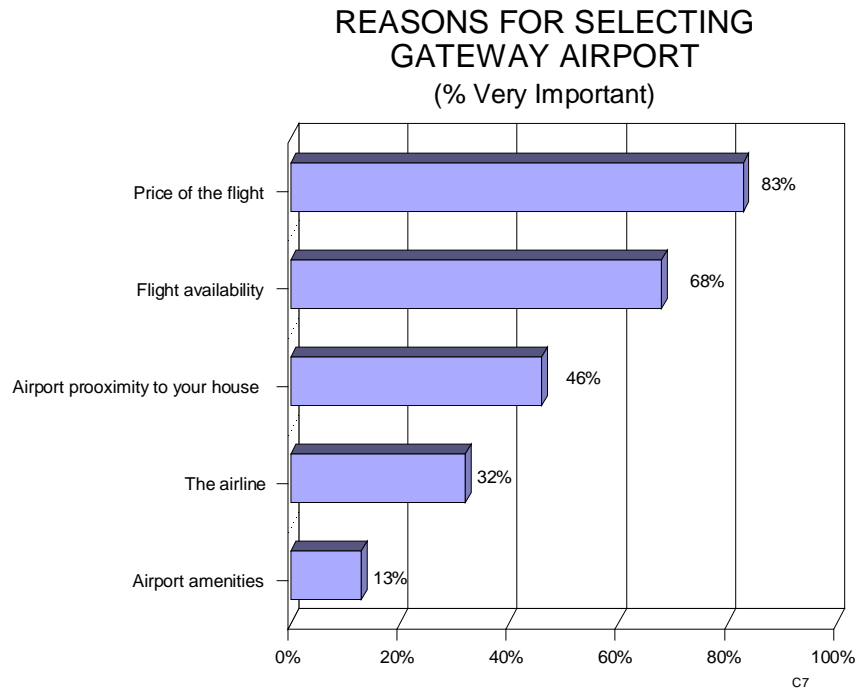
FREQUENCY OF AIRPORT USE (TABLE 5)

- The typical flier had flown out of Gateway an average of 4.7 times with over one-quarter (27%) having flown out over ten times.



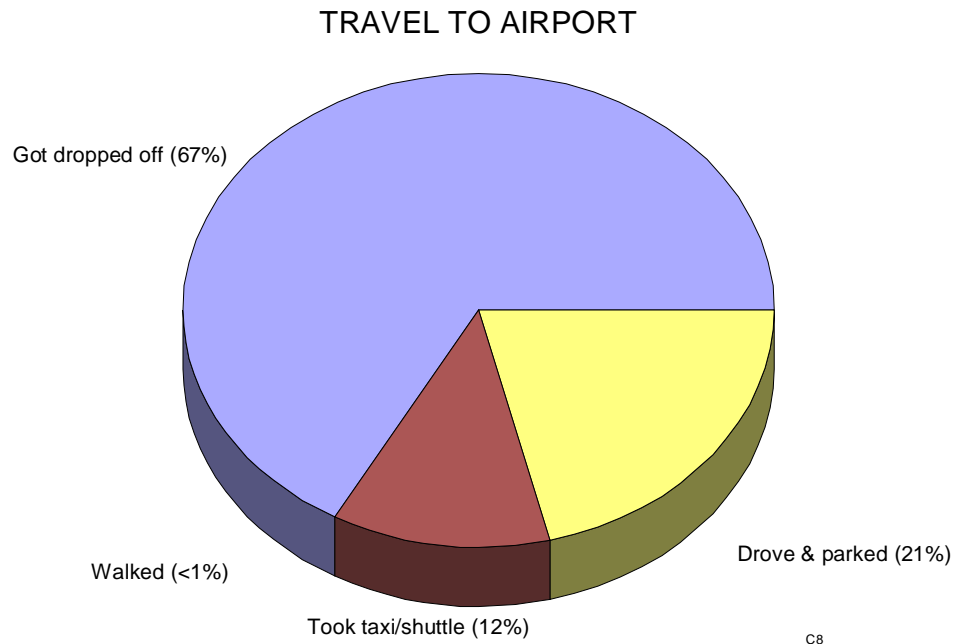
REASONS FOR SELECTING GATEWAY (TABLE 6)

- Price is the most important reason (83% very important) fliers give for selecting Gateway followed by flight availability (68%).



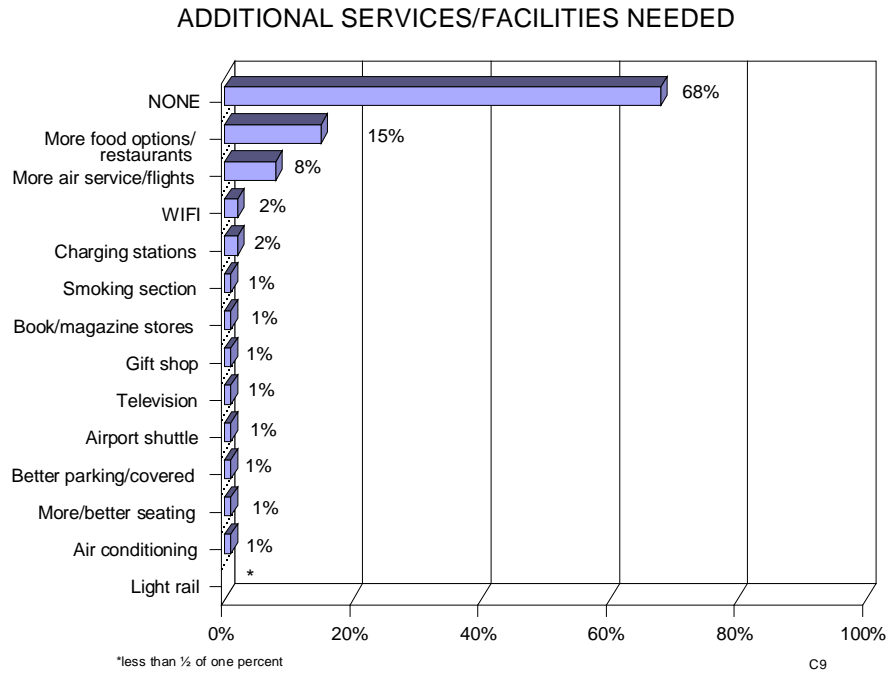
TRAVEL TO AIRPORT (TABLE 7)

- The most common manner by which fliers arrive at Gateway is to be dropped off with a reading of 67 percent.



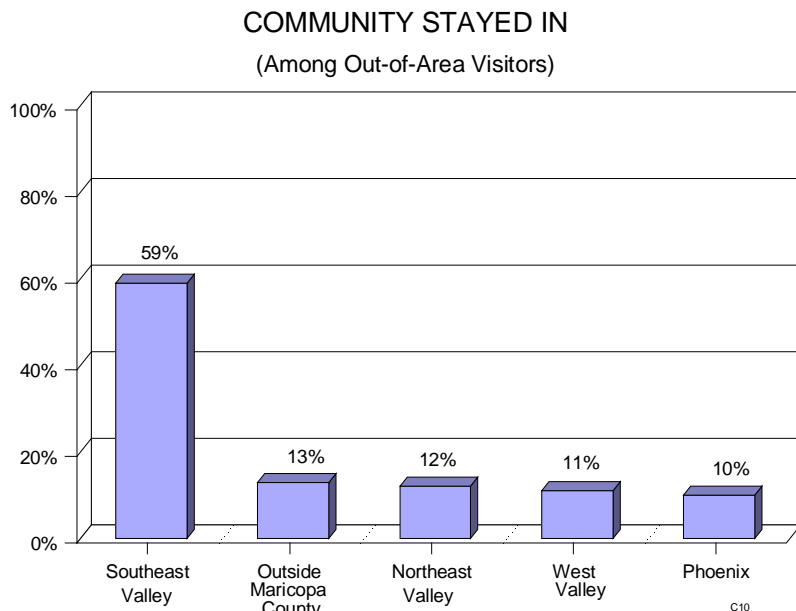
ADDITIONAL SERVICES/FACILITIES NEEDED (TABLE 8)

- The number one service/facility fliers would like to see available at Gateway are more food options (15%) followed by more flights (8%). Nearly seven out of ten fliers (68%) indicate that none are needed.



COMMUNITY STAYED IN (TABLES 9-10)

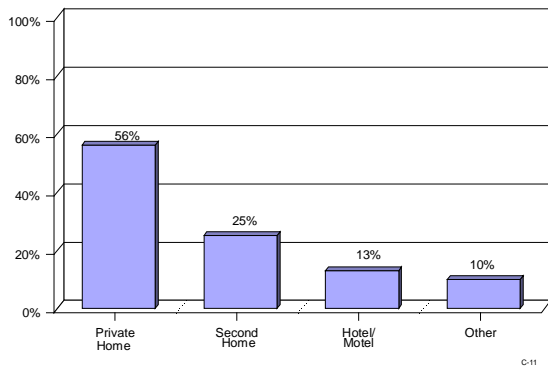
- Fifty-nine percent of out-of-area visitors stayed in the southeast valley during their stay with the largest number staying in Mesa (29%).
- Sixty-nine percent of out-of-area visitors made trips to other Arizona cities during their visit with the lion's share of these trips (82%) being made to other Maricopa County communities



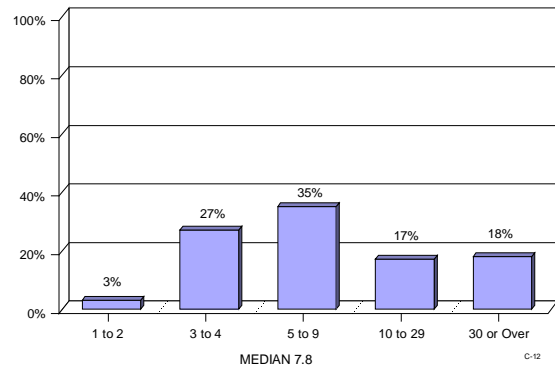
TRIP CHARACTERISTICS (TABLES 11-15)

- Fifty-six percent of out-of-area visitors stayed at a private home as a guest during their visit, while 25 percent stayed at their second home.
- The typical out-of-area visitor spent an average of 7.8 nights in Arizona during their visit.
- The typical out-of-area visitor party size was 1.9 people.
- Fifty-six percent of out-of-area visitors indicated they were in the area primarily to visit friends or relatives.
- The typical out-of-area visitor party spent under \$250 per day during their visit.

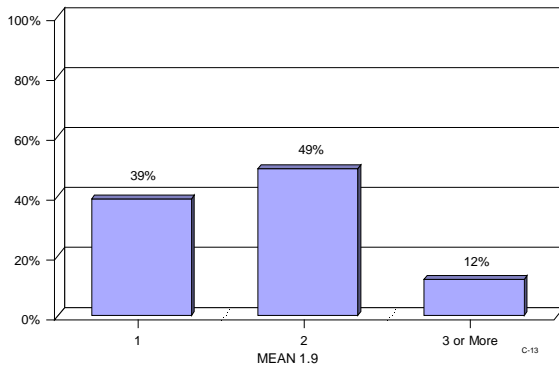
ACCOMMODATIONS
(Out-of-Area Visitors)



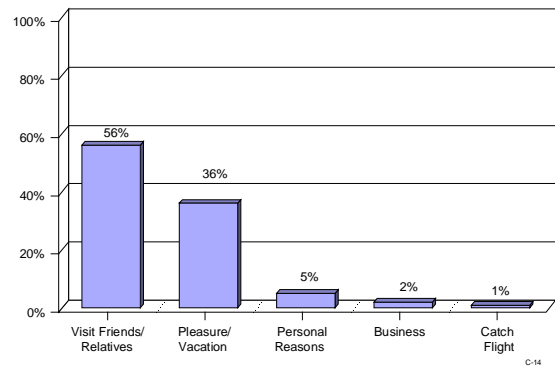
LENGTH OF STAY - NIGHTS
(Out-of-Area Visitors)



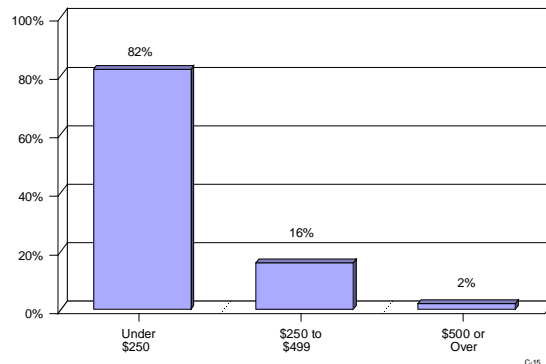
PARTY SIZE
(Out-of-Area Visitors)



TRIP PURPOSE
(Out-of-Area Visitors)

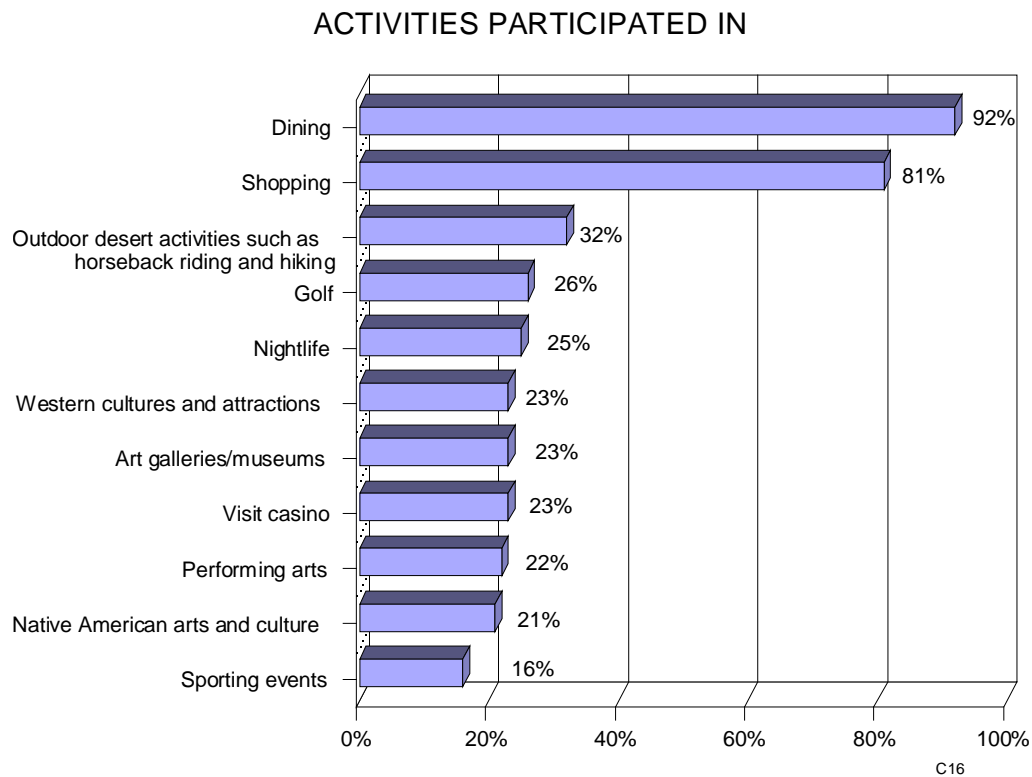


TRIP SPENDING - DAILY
(Out-of-Area Visitors)



ACTIVITIES PARTICIPATED IN (TABLE 16)

- Following dining (92%) and shopping (81%), the activities that out-of-area visitors most frequently participated in were outdoor desert activities (32%), golf (26%) and nightlife (25%).

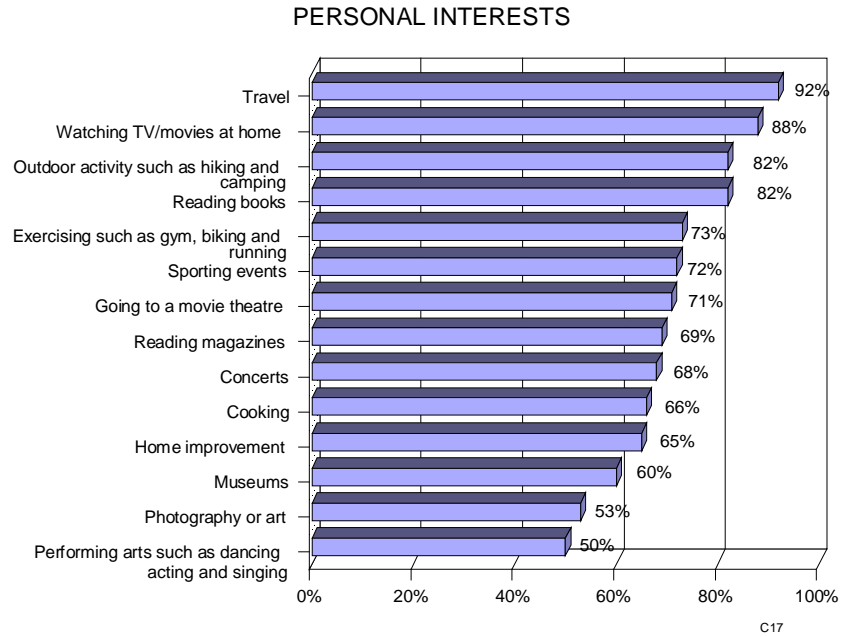


CAR RENTAL (TABLE 17)

- Seventeen percent of out-of-area visitors rented a car from a rental car company located at Gateway.

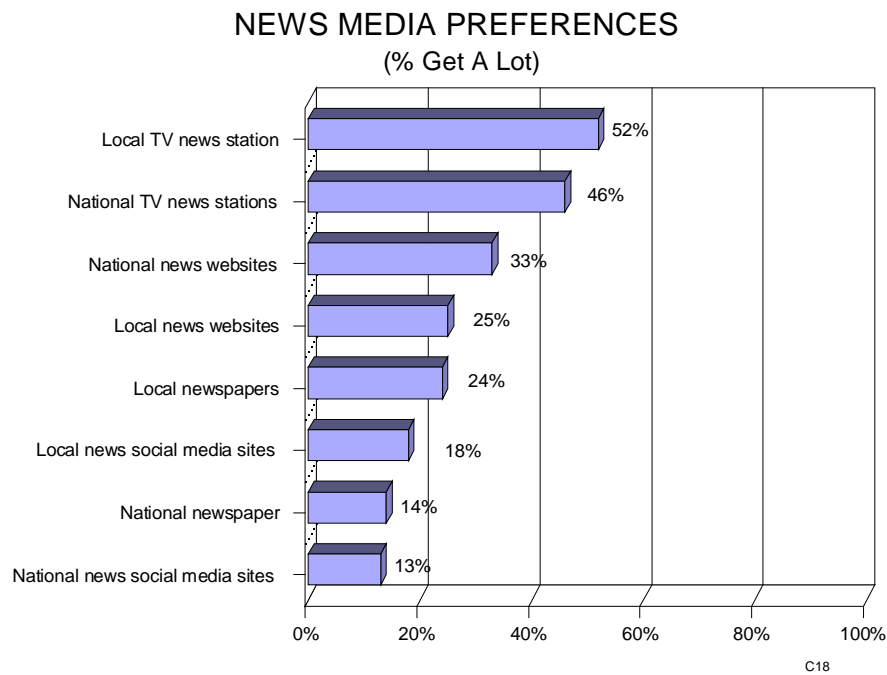
PERSONAL INTERESTS (TABLE 18)

- Those activities of most interest to fliers are travel (92%), watching TV (88%), outdoor activities (82%) and reading (82%).



NEWS MEDIA PREFERENCES (TABLE 19)

- A majority of fliers (52%) get “a lot” of their news from local TV news stations, while a near majority (46%) get “a lot” from national new stations.



DETAILED TABLES

TABLE 1: ORIGIN OF FLIERS

“Are you an Arizona resident or are you a visitor to the area?”

ARIZONA RESIDENT	54%
Southeast Valley	22
Mesa	10
Tempe	3
Gilbert	3
Chandler	3
Queen Creek	2
Apache Junction	1
Phoenix	10
Northeast Valley	7
West Valley	6
Southern Arizona	5
Northern Arizona	2
Central Arizona	1
Western Arizona	1
OUT-OF-AREA RESIDENTS	46%
Midwest	28
North Dakota	6
South Dakota	5
Missouri	3
Illinois	3
Iowa	3
Kansas	3
Michigan	2
Minnesota	1
Wisconsin	1
Indiana	1
Nebraska	*
West (Minus Arizona)	16
California	4
Washington	4
Montana	3
Oregon	2
Nevada	1
Idaho	1
Utah	1

(CONTINUED)

(CONT.) TABLE 1: ORIGIN OF FLIERS

South	2%
Mississippi	1
Arkansas	1
Texas	*
Oklahoma	*
Northeast	*
New York	*
Foreign	*

* Indicates % less than .5

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TABLE 2: FLIER DEMOGRAPHICS

|                              | <u>TOTAL</u> | <u>Local<br/>Residents</u> | <u>Out-of-Area<br/>Visitors</u> |
|------------------------------|--------------|----------------------------|---------------------------------|
| <u>AGE</u>                   |              |                            |                                 |
| Under 25                     | 8%           | 12%                        | 3%                              |
| 25 to 34                     | 14           | 17                         | 11                              |
| 35 to 44                     | 11           | 14                         | 8                               |
| 45 to 54                     | 13           | 12                         | 14                              |
| 55 to 64                     | 23           | 18                         | 29                              |
| 65 or over                   | <u>31</u>    | <u>27</u>                  | <u>35</u>                       |
|                              | 100%         | 100%                       | 100%                            |
| <br>MEDIAN AGE               | <br>56.6     | <br>50.9                   | <br>59.7                        |
| <br><u>EMPLOYMENT STATUS</u> |              |                            |                                 |
| Employed                     | 53%          | 51%                        | 55%                             |
| Retired                      | 37           | 34                         | 41                              |
| Student                      | 6            | 10                         | 1                               |
| Homemaker                    | 3            | 3                          | 2                               |
| Unemployed                   | <u>1</u>     | <u>2</u>                   | <u>1</u>                        |
|                              | 100%         | 100%                       | 100%                            |
| <br><u>INCOME</u>            |              |                            |                                 |
| Under \$50,000               | 27%          | 31%                        | 21%                             |
| \$50,000 to \$99,999         | 43           | 40                         | 46                              |
| \$100,000 or over            | <u>30</u>    | <u>29</u>                  | <u>33</u>                       |
|                              | 100%         | 100%                       | 100%                            |
| <br>MEDIAN INCOME (000)      | <br>\$77.1   | <br>\$73.4                 | <br>\$81.3                      |

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TABLE 3: FLIGHT DESTINATION

"What is the final destination of your flight today?"

	TOTAL	Local Residents	Out-of-Area Visitors
California	12%	15%	9%
San Francisco-Oakland	6	9	3
Fresno	3	3	4
Stockton	3	3	2
North Dakota	10%	6%	16%
Bismarck	4	2	7
Minot	4	3	5
Grand Forks	2	1	4
South Dakota	10%	9%	10%
Sioux Falls	7	6	8
Rapid City	3	3	2
Iowa	10%	13%	7%
Cedar Rapids	6	7	4
Des Moines	3	4	3
Moline/Quad Cities	1	2	0
Montana	9%	8%	8%
Billings	5	4	6
Bozeman	2	2	1
Great Falls	1	1	1
Missoula	1	1	0
Washington	7%	5%	8%
Pasco	7	5	8
Oregon	7%	9%	5%
Eugene	7	9	5
Kansas	6%	7%	4%
Wichita	6	7	4
Illinois	6%	3%	8%
Rockford	4	1	7
Peoria	2	2	1
Nevada	5%	8%	2%
Las Vegas	5	8	2
Utah	4%	6%	2%
Provo	3	5	1
Ogden	1	1	1
Missouri	4%	1%	8%
Springfield-Branson	4	1	8

(CONTINUED)

(CONT) TABLE 3: FLIGHT DESTINATION

	TOTAL	Local Residents	Out-of-Area Visitors
Michigan Grand Rapids	3% 3	2% 2	4% 4
Indiana South Bend	3% 3	3% 3	2% 2
Tennessee Memphis	2% 2	3% 3	3% 3
Idaho Idaho Falls	1% 1	1% 1	1% 1
Minnesota St. Cloud	1% 1	1% 1	2% 2
	100%	100%	100%

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TABLE 4: DESIRED NEW DESTINATIONS

“What destination, if any, would you like to see serviced out of Gateway that is not currently served?”

|                     |     |
|---------------------|-----|
| NONE                | 60% |
| California          | 11% |
| San Diego           | 3   |
| Los Angeles         | 2   |
| Sacramento          | 1   |
| San Jose            | 1   |
| Monterey            | 1   |
| Long Beach          | *   |
| San Bernardino      | *   |
| Bakersfield         | *   |
| Palm Springs        | *   |
| San Joaquin Valley  | *   |
| Carlsbad            | *   |
| Anaheim             | *   |
| Burbank             | *   |
| Hawaii              | 4%  |
| Honolulu            | 3   |
| Maui                | 1   |
| Florida             | 3%  |
| Orlando             | 1   |
| Tampa               | 1   |
| Ft. Lauderdale      | *   |
| Ft. Walton Beach    | *   |
| Destin              | *   |
| Fort Meyers         | *   |
| Michigan            | 3%  |
| Detroit             | 1   |
| Lansing             | 1   |
| Flint               | 1   |
| Kalamazoo           | *   |
| Washington          | 3%  |
| Seattle             | 1   |
| Spokane             | 1   |
| Redmond             | 1   |
| New York            | 2%  |
| NYC                 | 1   |
| Rochester           | *   |
| West Chester County | *   |

(CONTINUED)

(CONT.) TABLE 4: DESIRED DESTINATIONS

|                |    |
|----------------|----|
| Oregon         | 2% |
| Portland       | 1  |
| Medford        | 1  |
| Redmond        | *  |
| Bend           | *  |
| Foreign        | 2% |
| Canada         | 1  |
| Costa Rica     | *  |
| Russia         | *  |
| Mexico         | *  |
| Texas          | 2% |
| Dallas         | 1  |
| Houston        | 1  |
| El Paso        | *  |
| Waco           | *  |
| Austin         | *  |
| Minnesota      | 2% |
| Minneapolis    | 1  |
| St. Paul       | *  |
| Duluth         | *  |
| Mankato        | *  |
| Colorado       | 2% |
| Denver         | 1  |
| Pueblo         | 1  |
| Durango        | *  |
| Arizona        | 2% |
| Tucson         | 1  |
| Page           | *  |
| Sun City West  | *  |
| Idaho          | 2% |
| Boise          | 1  |
| Lewiston       | *  |
| Twin Falls     | *  |
| Coeur d'Alene  | *  |
| Utah           | 1% |
| Salt Lake City | 1  |
| St. George     | *  |
| Vernal         | *  |
| North Dakota   | 1% |
| Williston      | 1  |
| Dickinson      | *  |
| Nevada         | 1% |
| Reno/Tahoe     | 1  |

(CONTINUED)

(CONT.) TABLE 4: DESIRED DESTINATIONS

|                |    |
|----------------|----|
| Wyoming        | 1% |
| Casper         | 1  |
| Georgia        | 1% |
| Atlanta        | 1  |
| Savannah       | *  |
| New Mexico     | 1% |
| Albuquerque    | 1  |
| Farmington     | *  |
| Taos           | *  |
| Alabama        | 1% |
| Huntsville     | 1  |
| Ft. Rucker     | *  |
| Arkansas       | 1% |
| Little Rock    | 1  |
| Jonesboro      | *  |
| Iowa           | 1% |
| Sioux City     | *  |
| Mason City     | *  |
| Illinois       | 1% |
| Chicago        | *  |
| Marion         | *  |
| Carbondale     | *  |
| Missouri       | 1% |
| Branson        | 1  |
| New Jersey     | 1% |
| Newark         | 1  |
| North Carolina | 1% |
| Charlotte      | *  |
| Raleigh        | *  |
| Durham         | *  |
| Kansas         | *% |
| Manhattan      | *  |
| Montana        | *% |
| Kalispell      | *  |

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TABLE 5: FREQUENCY OF AIRPORT USE

“Including this trip, how many times have you flown into or out of Gateway Airport?”

	TOTAL	Local Resident	Out-of-Area Visitors
1 to 2	31%	26%	37%
3 to 5	22	25	19
6 to 10	20	21	19
11 or more	27	28	25
	100%	100%	100%
MEDIAN	4.7	4.9	4.4

~~~~~

TABLE 6: REASONS FOR SELECTING GATEWAY

“Were each of the following factors very important, somewhat important or not important in your decision to fly out of Gateway Airport for this trip?”

|                                 | Very | Some-what | Not | Not Sure |
|---------------------------------|------|-----------|-----|----------|
| Price of the flight             | 83%  | 14%       | 3%  | *%       |
| Flight availability             | 68   | 19        | 13  | *        |
| Airport proximity to your house | 46   | 14        | 38  | 2        |
| The airline                     | 32   | 27        | 38  | 3        |
| Airport amenities               | 13   | 24        | 60  | 3        |

\*Indicates % less than .5

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TABLE 7: TRAVEL TO AIRPORT

“How did you arrive at Gateway today? Did you...”

	TOTAL	Local Resident	Out-of-Area Visitors
Got dropped off	67%	62%	72%
Drive and park	21	21	21
Took a taxi or shuttle	12	17	7
Walked	*	*	*
	100%	100%	100%

*Indicates % Less than .5

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TABLE 8: ADDITIONAL SERVICES/FACILITIES NEEDED

“What additional services or facilities would you like to see available at Gateway Airport?”

|                                     | TOTAL | Local Resident | Out-of-Area Visitors |
|-------------------------------------|-------|----------------|----------------------|
| NONE                                | 68%   | 68%            | 68%                  |
| More food options/<br>restaurants   | 15    | 16             | 13                   |
| More air service/flights            | 8     | 8              | 9                    |
| WIFI                                | 2     | 3              | 1                    |
| Charging stations                   | 2     | 1              | 2                    |
| Smoking section                     | 1     | 2              | 1                    |
| Book/magazine stores                | 1     | 2              | 1                    |
| Gift shop                           | 1     | 1              | 1                    |
| Television                          | 1     | 0              | 2                    |
| Airport shuttle                     | 1     | 2              | 1                    |
| Better parking/covered              | 1     | 2              | 1                    |
| More/better seating                 | 1     | 0              | 2                    |
| Air conditioning – more comfortable | 1     | 1              | 1                    |
| Light rail                          | *     | 0              | 1                    |

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TABLE 9: COMMUNITY STAYED IN

(AMONG OUT-OF-AREA VISITORS)

“In which local community did you stay during your visit to Arizona?”

<u>SOUTHEAST VALLEY</u>	59%
Mesa	29
Gilbert	8
Queen Creek	8
Apache Junction/Gold Canyon	7
Chandler	4
Tempe	2
Ahwatukee	1
<u>OUTSIDE MARICOPA</u>	13
<u>NORTHEAST VALLEY</u>	12
Scottsdale	10
Fountain Hills	1
Cave Creek/Carefree	1
<u>WEST VALLEY</u>	11
<u>PHOENIX</u>	10
Not applicable – drove in from outside Arizona to catch flight	1

Total may exceed 100% due to multiple responses

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TABLE 10: OTHER AREAS VISITED

(AMONG OUT-OF-AREA VISITORS)

“And what other cities in Arizona, if any, did you visit on your trip?”

|                             |     |
|-----------------------------|-----|
| NONE                        | 31% |
| Other local Maricopa County | 82  |
| Pinal County                | 4   |
| Yavapai County              | 4   |
| Pima County                 | 3   |
| Gila County                 | 2   |
| Coconino County             | 1   |
| Mohave County               | 1   |
| La Paz County               | 1   |
| Yuma County                 | *   |

Total exceeds 100% due to multiple responses

~~~~~

TABLE 11: ACCOMMODATIONS

(AMONG OUT-OF-AREA VISITORS)

“During your visit to Arizona did you stay in...?”

A private home as a guest	56%
Personal second home	25
A full-service hotel	8
A luxury resort	4
RV park/camp A time share	4
A rental home, apartment or condo	2
A timeshare	2
A limited-service hotel or motel	1
Air Force base/dorm	1
Not applicable – drove in from out of state	1

Total exceeds 100% due to multiple responses.

* Total exceeds 100% due to rounding

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TABLE 12: LENGTH OF STAY

(AMONG OUT-OF-AREA VISITORS)

“How many nights, in total, did you spend in Arizona on your visit?”

|            |      |
|------------|------|
| 1 to 2     | 3%   |
| 3 to 4     | 27   |
| 5 to 9     | 35   |
| 10 to 14   | 13   |
| 15 to 29   | 4    |
| 30 to 59   | 9    |
| 60 or over | 9    |
|            | 100% |
| MEDIAN     | 7.8  |

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TABLE 13: PARTY SIZE

(AMONG OUT-OF-AREA VISITORS)

“Including yourself, how many people are there in your travel party to Arizona?”

1	39%
2	49
3 to 4	10
5 or more	<u>2</u>
	100%

MEAN 1.9

~~~~~

TABLE 14: TRIP PURPOSE

(AMONG OUT-OF-AREA VISITORS)

“Next, which one of the following categories best describes the primary purpose of your visit to Arizona?”

|                                   |          |
|-----------------------------------|----------|
| Visit friends or relatives        | 56%      |
| Pleasure or vacation              | 36       |
| Business meetings or a convention | 2        |
| Personal reasons such as health   | 5        |
| Catch flight out of Arizona       | <u>1</u> |
|                                   | 100%     |

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TABLE 15: TRIP SPENDING PATTERNS - DAILY

(AMONG OUT-OF-AREA VISITORS)

“Now I’d like to get some idea of your spending patterns during your visit. Thinking about a typical day during your visit, on average, how much did you and your travel party spend each day on lodging, food and beverage, entertainment, shopping and public transportation? When responding, please include the combined daily spending for all members of your travel party.”

Under \$250	82%
\$250 to \$499	16
\$500 or over	<u>2</u>
	100%

MEDIAN

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TABLE 16: ACTIVITIES PARTICIPATED IN

(AMONG OUT-OF-AREA VISITORS)

“Next, during your visit to Arizona, did you participate in any of the following activities?”

|                                                                     | <u>AGE</u>   |                     |                   |                       |
|---------------------------------------------------------------------|--------------|---------------------|-------------------|-----------------------|
|                                                                     | <u>TOTAL</u> | <u>Under<br/>35</u> | <u>35-<br/>54</u> | <u>55 or<br/>Over</u> |
| Dining                                                              | 92%          | 78%                 | 95%               | 94%                   |
| Shopping                                                            | 81           | 70                  | 71                | 88                    |
| Outdoor desert activities<br>such as horseback riding<br>and hiking | 32           | 44                  | 18                | 34                    |
| Golf                                                                | 26           | 9                   | 8                 | 36                    |
| Nightlife                                                           | 25           | 22                  | 21                | 27                    |
| Western culture and<br>attractions                                  | 23           | 4                   | 24                | 26                    |
| Art galleries and museums                                           | 23           | 9                   | 21                | 27                    |
| Visit a casino                                                      | 23           | 9                   | 13                | 29                    |
| Performing arts                                                     | 22           | 13                  | 11                | 28                    |
| Native American arts and<br>culture                                 | 21           | 9                   | 8                 | 28                    |
| Sporting events                                                     | 16           | 9                   | 16                | 18                    |

TABLE 17: CAR RENTAL

(AMONG OUT-OF-AREA VISITORS)

“Did you rent a car from one of the rental car companies here at Gateway Airport?” (IF YES)  
“Which one?”

|                |     |
|----------------|-----|
| No             | 83% |
| Yes            | 17  |
| Hertz          | 7%  |
| Alamo/National | 5   |
| Enterprise     | 5   |

TABLE 18: PERSONAL INTERESTS

“Next, do each of the following hobbies or activities interest you or not interest you?”

|                                                     | HAVE INTEREST IN |                 |                      |
|-----------------------------------------------------|------------------|-----------------|----------------------|
|                                                     | TOTAL            | Local Residents | Out-of-Area Visitors |
| Travel                                              | 92%              | 94%             | 89%                  |
| Watching TV/movies at home                          | 88               | 90              | 87                   |
| Outdoor activity such as hiking and camping         | 82               | 83              | 80                   |
| Reading books                                       | 82               | 86              | 78                   |
| Exercising such as gym, biking and running          | 73               | 75              | 71                   |
| Sporting events                                     | 72               | 74              | 71                   |
| Going to a movie theatre                            | 71               | 73              | 68                   |
| Reading magazines                                   | 69               | 67              | 71                   |
| Concerts                                            | 68               | 71              | 65                   |
| Cooking                                             | 66               | 65              | 67                   |
| Home improvement                                    | 65               | 64              | 66                   |
| Museums                                             | 60               | 62              | 56                   |
| Photography or art                                  | 53               | 57              | 50                   |
| Performing arts such as dancing, acting and singing | 50               | 50              | 50                   |
| Playing sports                                      | 49               | 53              | 45                   |
| Gardening                                           | 41               | 36              | 47                   |
| Mechanics/cars                                      | 36               | 37              | 36                   |
| Nightlife such as dancing and clubs                 | 34               | 38              | 30                   |
| Sewing/knitting                                     | 23               | 20              | 26                   |
| Video games                                         | 21               | 26              | 14                   |

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TABLE 19: MEDIA PREFERENCES

“Do you get a lot, some or none of your news from each of the following sources?”

	A Lot	Some	None
Local TV news stations	52%	29%	19%
National TV news stations	46	30	24
National news websites	33	29	38
Local news websites	25	35	40
Local newspapers	24	25	51
Local news social media sites	18	25	57
National newspapers	14	19	67
National news social media sites	13	25	62

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