



ECONOMIC IMPACT ANALYSIS

APPLIED
ANALYSIS



Economic Impact Analysis

RESEARCH METHODOLOGY

- **Data Collection:** IMPLAN data tracking domestic trade between Clark County, Nevada and five Southern California counties – San Bernardino, Los Angeles, Orange, Riverside and Ventura – was gathered for 2022, the most recent year available. Federal freight data was collected for 2019 through 2023.
- **Analysis:** Domestic freight shipment data were used to estimate the share of material goods moved by truck between Clark County and Southern California. For services, the share of trade conducted via physical travel was estimated on an industry-by-industry basis. In all categories of trade, it was assumed that 95 percent of travel by truck or car between the two regions used Interstate 15.

IMPLAN trade values assigned to Interstate 15 were inflated to 2025 dollars and assigned to corresponding industry supersectors. Tourism-related spending in Clark County was estimated using visitor volume and spending data from the Las Vegas Convention and Visitors Authority, while tourism-related spending in Southern California was measured using economic data from Visit California.

Region Analyzed

I-15 | INTERSTATE DOMESTIC TRADE

SOUTHERN NEVADA

Clark County

SOUTHERN CALIFORNIA

San Bernardino County

Los Angeles County

Riverside County

Ventura County

Orange County



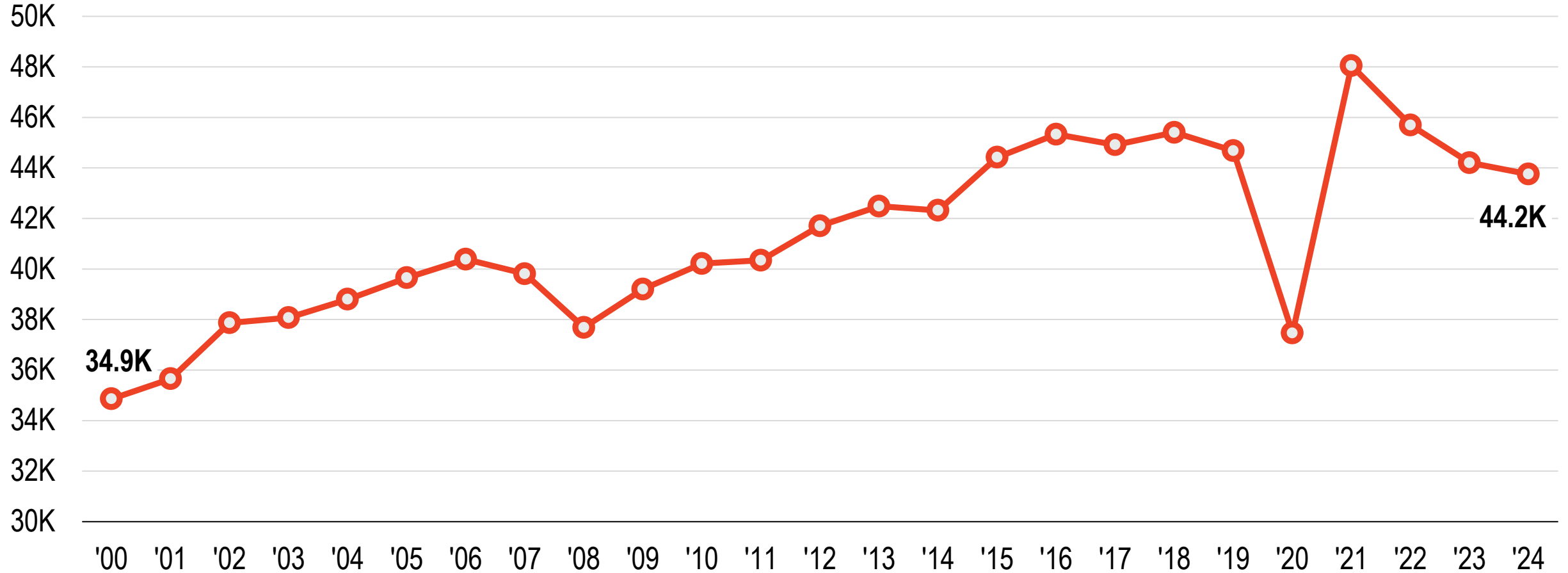
I-15 Trade | Annual Impact

	Clark County, NV	San Bernardino County, CA	Balance of SoCal	Total
Total Gross Domestic Product (GDP)	\$176.0B	\$136.8B	\$1.5T	\$1.8T
TRUCK FREIGHT RECEIVED ^[1]	<i>Includes Nye County</i>		<i>Represents all SoCal</i>	
Value	\$21.8B	<i>Not Available</i>	\$3.6B	\$25.4B
Tons	5.1M	<i>Not Available</i>	2.0M	7.1M
I-15 TRADE OUTPUT				
Direct	\$13.1B	\$2.4B	\$6.6B	\$22.2B
Indirect/Induced	\$8.0B	\$0.9B	\$3.3B	\$12.1B
Total	\$21.1B	\$3.3B	\$9.9B	\$34.3B
SHARE OF GRP				
Direct Output	7.5%	1.8%	0.4%	1.2%
Total Output	12.0%	2.4%	0.7%	1.9%
TRADE LOST PER HOUR				
Direct Output	\$1.5M	\$0.3M	\$0.8M	\$2.5M
Total Output	\$2.4M	\$0.4M	\$1.1M	\$3.9M

Source: Applied Analysis; IMPLAN; LVCVA; Visit California; U.S. Bureau of Transportation Statistics. Note: 2022 values adjusted to 2025 dollars. [1] Represents domestic/foreign freight movements, not point of consumption.

Average Daily Traffic

I-15 | NV-CA BORDER



Source: LVCVA. Note: Represents both northbound and southbound traffic.

Border Traffic

2024 | DAILY AVERAGE

37,458

Passenger Vehicles

7,459

Trucks



Source: Applied Analysis; LVCVA; Nevada Department of Transportation. Image Source: Las Vegas Review-Journal.
Note: Traffic shares approximated using 2023 measurements of vehicle types taken on I-15 between state line and Exit 12.

Annual I-15 Truck Freight

CLARK COUNTY | DOMESTIC & FOREIGN TRADE

Category	Value	Tons
Pharmaceuticals	\$3.8B	20.1K
Electronics	\$3.5B	335.8K
Mixed Freight	\$3.0B	581.8K
Misc. Manufacturing Products	\$1.6B	256.3K
Textiles & Leather	\$1.5B	152.8K
Machinery	\$1.2B	157.3K
Chemical Products	\$0.9B	164.8K
Motorized Vehicles	\$0.7B	54.5K
Furniture	\$0.7B	114.0K
Plastics & Rubber	\$0.7B	136.6K
All Other Good Types	\$4.2B	3.1M
TOTAL	\$21.8B	5.1M



Source: U.S. Bureau of Transportation Statistics.

Note: Represents trade in 2022. Values inflation adjusted to 2025 dollars. Listed location not always indicative of freight's final destination.

Annual I-15 Truck Freight

SOCAL | DOMESTIC & FOREIGN TRADE

Category	Value	Tons
Misc. Manufacturing Products	\$983.4M	19.8K
Other Foodstuffs	\$482.6M	281.6K
Electronics	\$282.2M	27.4K
Nonmetal Mineral Products	\$259.8M	1.2M
Plastics & Rubbers	\$255.9M	64.4K
Textiles & Leather	\$233.3M	13.2K
Milled Grain Products	\$151.3M	75.8K
Machinery	\$139.5M	10.5K
Mixed Freight	\$99.4M	9.8K
Paper Articles	\$98.2M	32.0K
All Other Good Types	\$639.0M	276.8K
TOTAL	\$3.6B	2.0M



Source: U.S. Bureau of Transportation Statistics.

Note: Represents trade in 2022. Values inflation adjusted to 2025 dollars. Listed location not always indicative of freight's final destination.



“The 44-hour closure of I-15 about 25 miles east of Barstow was a major problem for weekend travelers on their way to Las Vegas.

A flatbed truck carrying six industrial-grade batteries overturned on the shoulder of northbound I-15, stopping traffic for miles in 110-degree heat.”

Image Source: San Bernardino County Fire Department



ECONOMIC OVERVIEW

SHUTDOWN IMPACT

RIPPLE EFFECT

OTHER CONSIDERATIONS

NEXT STEPS



ECONOMIC OVERVIEW

SHUTDOWN IMPACT

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All Counties

GROSS DOMESTIC PRODUCT

\$1.8T

Total GDP



Source: Applied Analysis; IMPLAN; LVCVA; Visit California; U.S. Bureau of Transportation Statistics. Note: 2022 Values adjusted to 2025 dollars.

All Counties

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$1.8T

Total GDP

\$22.2B

I-15 Trade



Source: Applied Analysis; IMPLAN; LVCVA; Visit California; U.S. Bureau of Transportation Statistics

All Counties

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$22.2B

I-15 Trade

1.2%

GDP Share



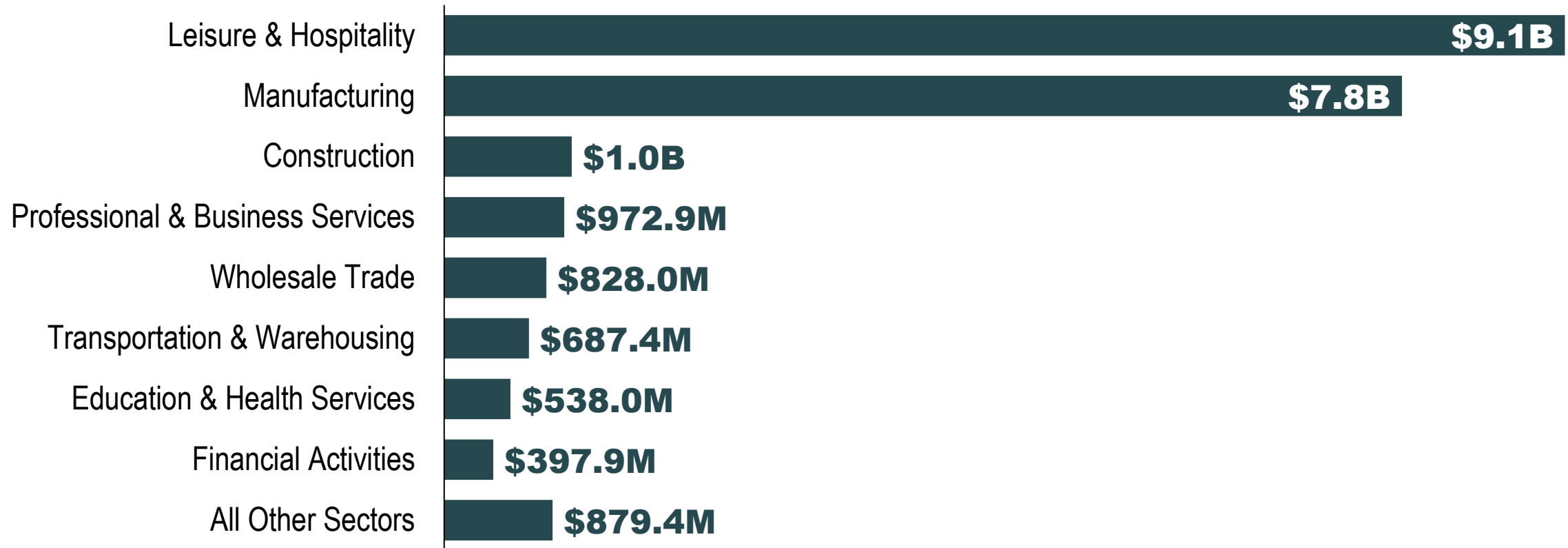
Source: Applied Analysis; IMPLAN; LVCVA; Visit California; U.S. Bureau of Transportation Statistics

All Counties

I-15 IMPACT | 2022 (IN 2025 DOLLARS)



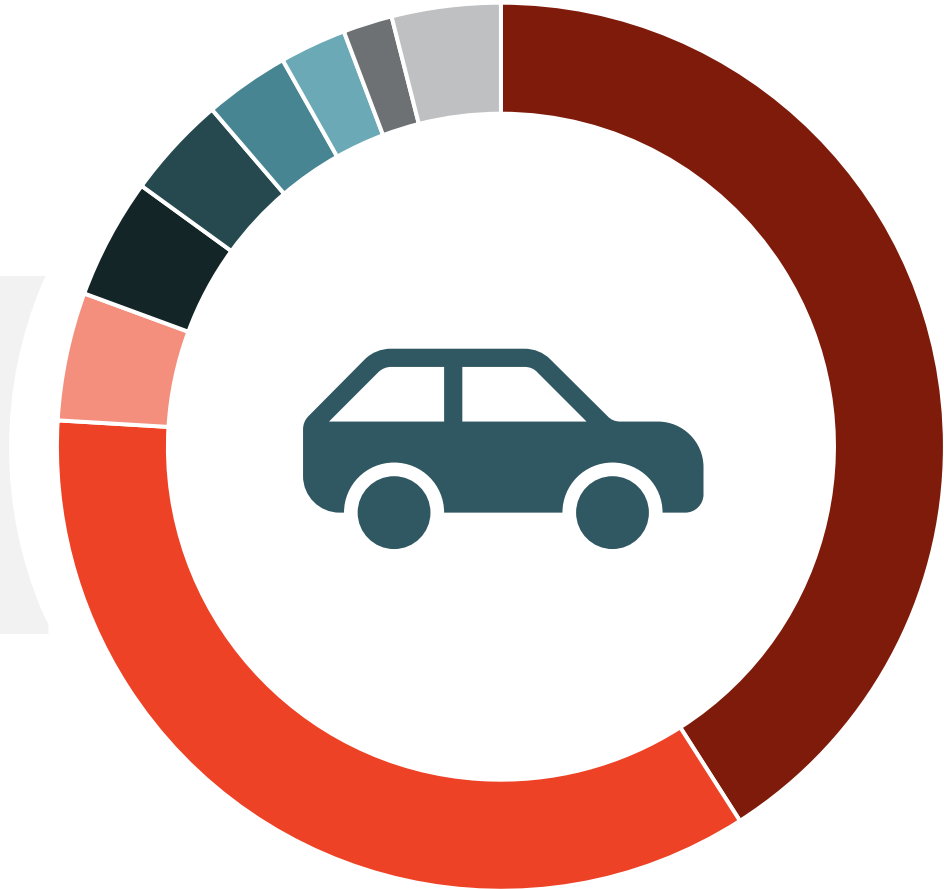
Annual Direct Output



Source: Applied Analysis; IMPLAN; LVCVA; Visit California; U.S. Bureau of Transportation Statistics

All Counties

I-15 IMPACT | 2022 (IN 2025 DOLLARS)



SHARE	INDUSTRY
41.0%	Leisure & Hospitality
35.0%	Manufacturing
4.7%	Construction
4.4%	Professional & Business Services
3.7%	Wholesale Trade
3.1%	Transportation & Warehousing
2.4%	Education & Health Services
1.8%	Financial Activities
4.0%	All Other Sectors

Source: Applied Analysis; IMPLAN; LVCVA; Visit California; U.S. Bureau of Transportation Statistics

All Counties

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$22.2B

I-15 Trade

1.2%

GDP Share



Source: Applied Analysis; IMPLAN; LVCVA; Visit California; U.S. Bureau of Transportation Statistics

Clark County

GROSS DOMESTIC PRODUCT

\$176B

Total GDP



Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics. Note: 2022 Values adjusted to 2025 dollars.

Clark County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$176B

Total GDP

\$2.7B

I-15 Trade



Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics

Clark County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$2.7B

I-15 Trade

1.5%

GDP Share



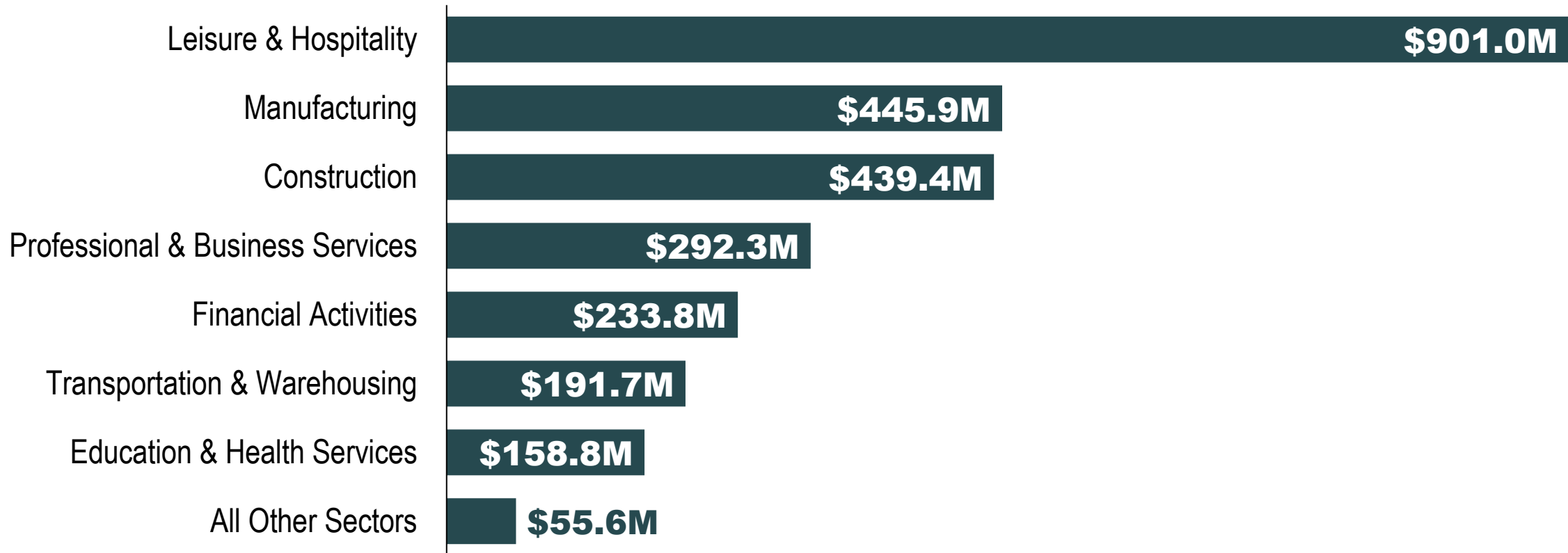
Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics

Clark County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)



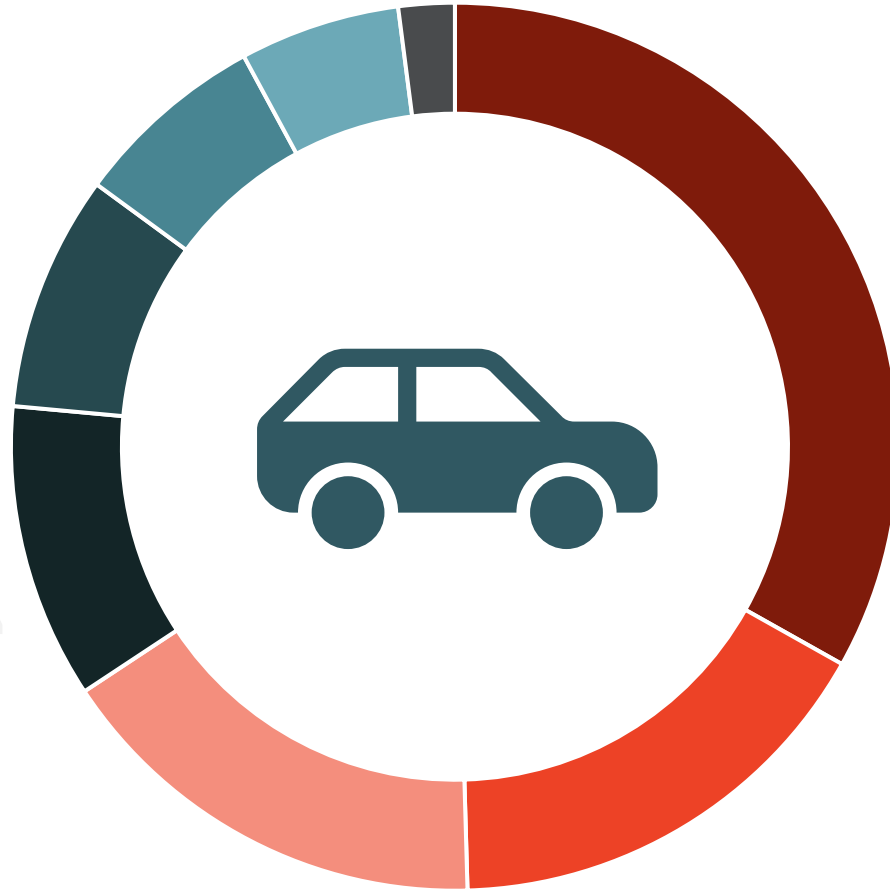
Annual Direct Output



Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics

Clark County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)



SHARE	INDUSTRY
33.1%	Leisure & Hospitality
16.4%	Manufacturing
16.2%	Construction
10.8%	Professional & Business Services
8.6%	Financial Activities
7.1%	Transportation & Warehousing
5.8%	Education & Health Services
2.0%	All Other Sectors

Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics

Clark County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$2.7B

I-15 Trade

1.5%

GDP Share



Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics

Clark County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$10.4B

I-15 Trade

5.9%

GDP Share



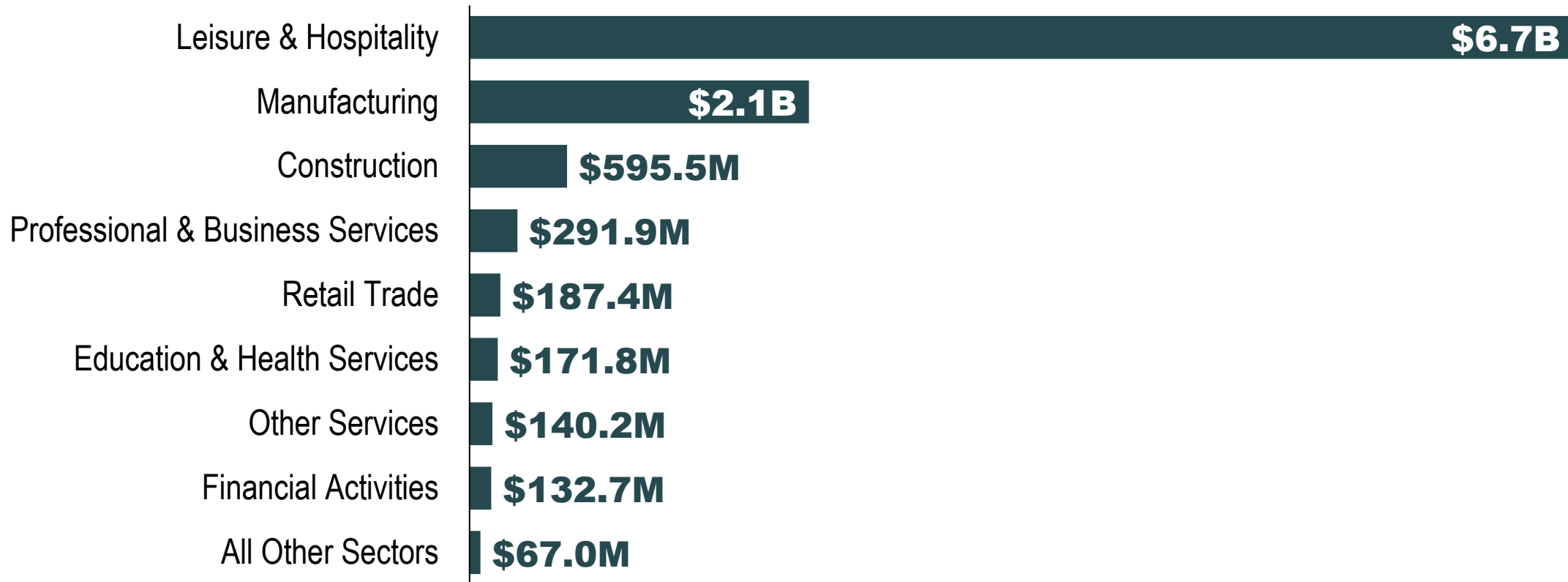
Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics

Clark County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)



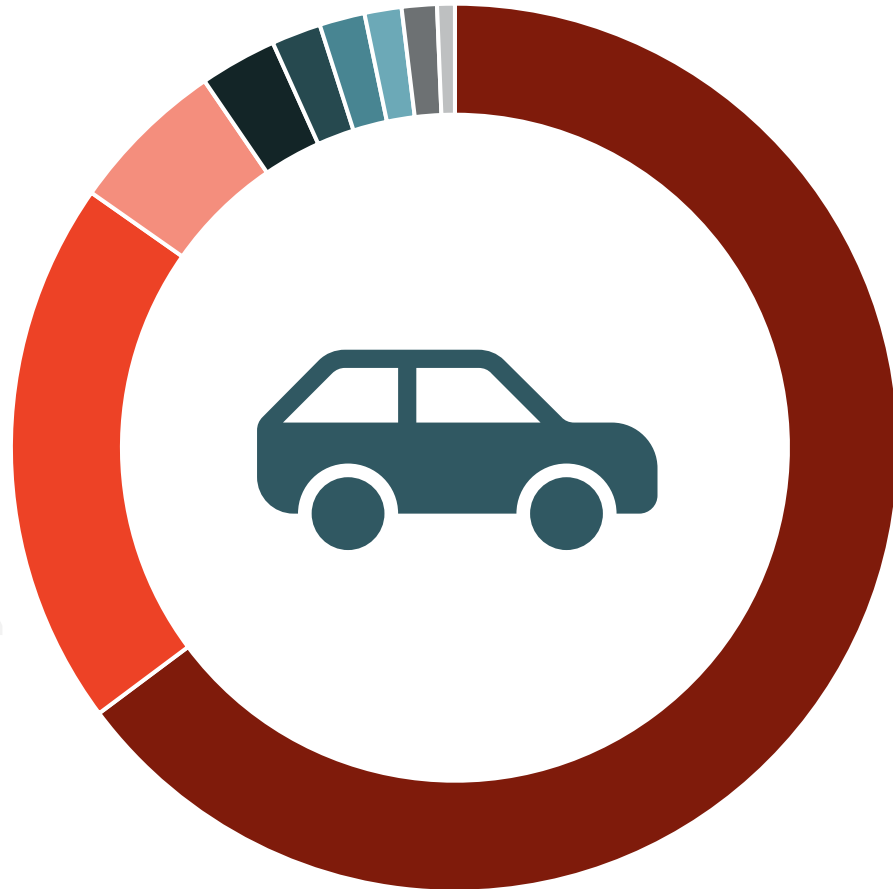
Annual Direct Output



Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics

Clark County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)



SHARE	INDUSTRY
64.8%	Leisure & Hospitality
19.9%	Manufacturing
5.7%	Construction
2.8%	Professional & Business Services
1.8%	Retail Trade
1.7%	Education & Health Services
1.3%	Other Services
1.3%	Financial Activities
0.6%	All Other Sectors

Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics

Clark County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$10.4B

I-15 Trade

5.9%

GDP Share



Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics

San Bernardino County

GROSS DOMESTIC PRODUCT

\$137B

Total GDP



Receives Trade

Provides Trade

Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics. Note: 2022 Values adjusted to 2025 dollars.

San Bernardino County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$137B

Total GDP

\$2.4B

I-15 Trade



Receives Trade

Provides Trade

Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics

San Bernardino County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$2.4B

I-15 Trade

1.8%

GDP Share



Receives Trade

Provides Trade

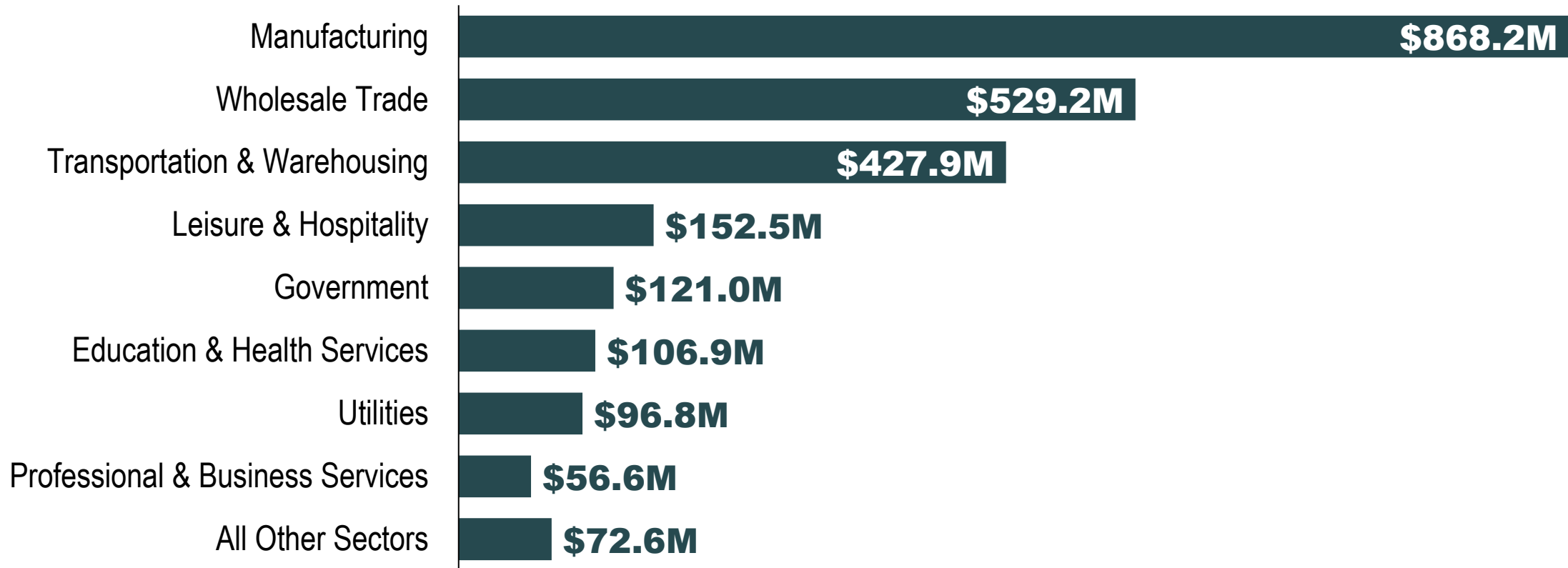
Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics

San Bernardino County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)



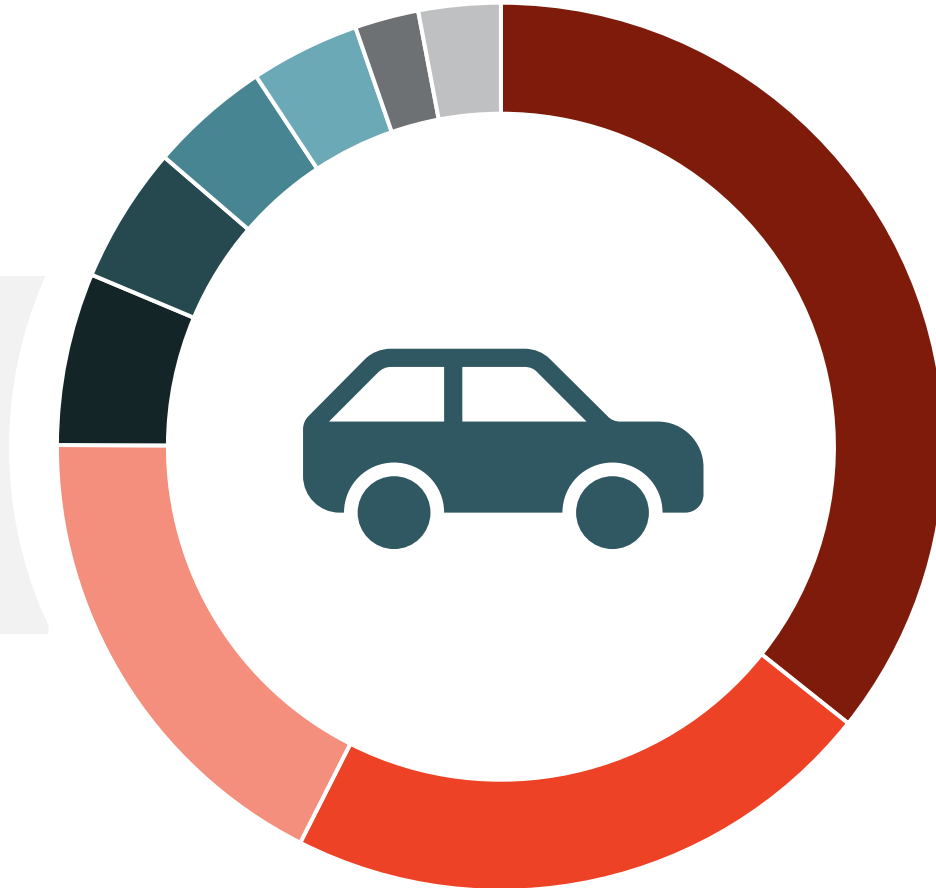
Annual Direct Output



Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics

San Bernardino County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)



SHARE	INDUSTRY
35.7%	Manufacturing
21.8%	Wholesale Trade
17.6%	Transportation & Warehousing
6.3%	Leisure & Hospitality
5.0%	Government
4.4%	Education & Health Services
4.0%	Utilities
2.3%	Professional & Business Services
3.0%	All Other Sectors

Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics

San Bernardino County

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$2.4B

I-15 Trade

1.8%

GDP Share



Receives Trade

Provides Trade

Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics

Balance of SoCal

GROSS DOMESTIC PRODUCT

\$1.5T

Total GDP



Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics. Note: 2022 Values adjusted to 2025 dollars.

Balance of SoCal

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$1.5T

Total GDP

\$6.6B

I-15 Trade



Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics

Balance of SoCal

I-15 IMPACT | 2022 (IN 2025 DOLLARS)

\$6.6B

I-15 Trade

0.4%

GDP Share



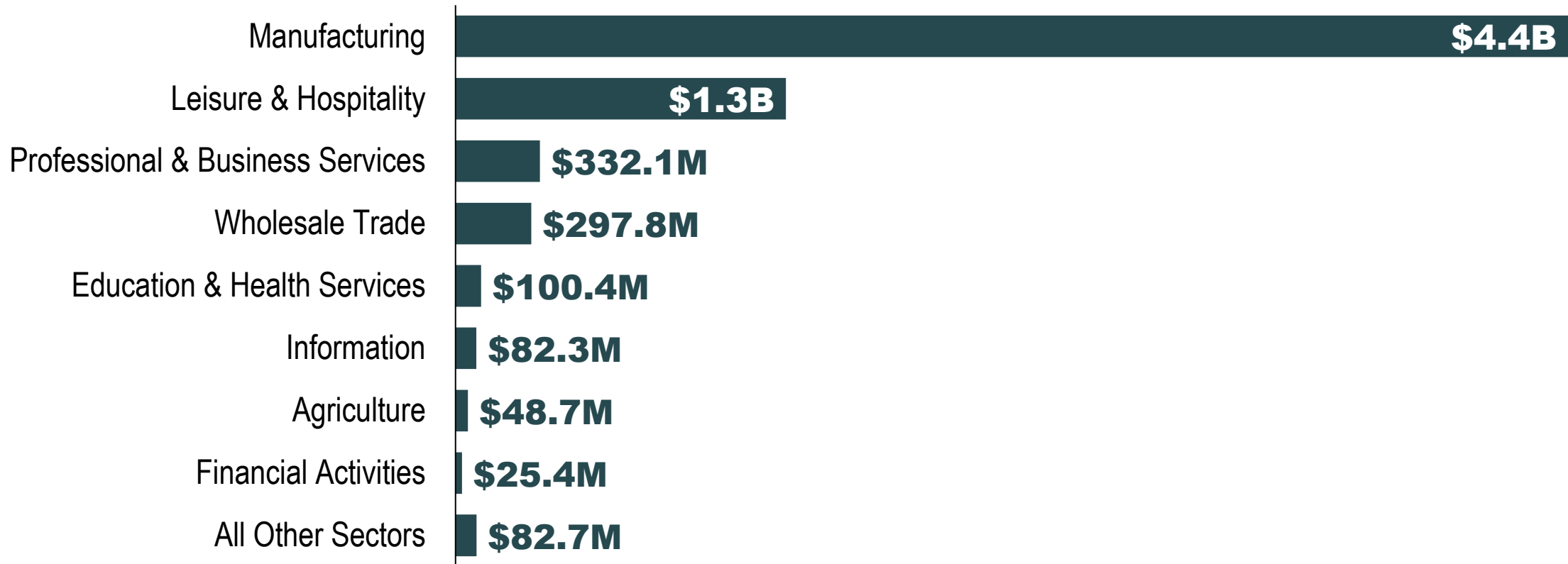
Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics

Balance of SoCal

I-15 IMPACT | 2022 (IN 2025 DOLLARS)



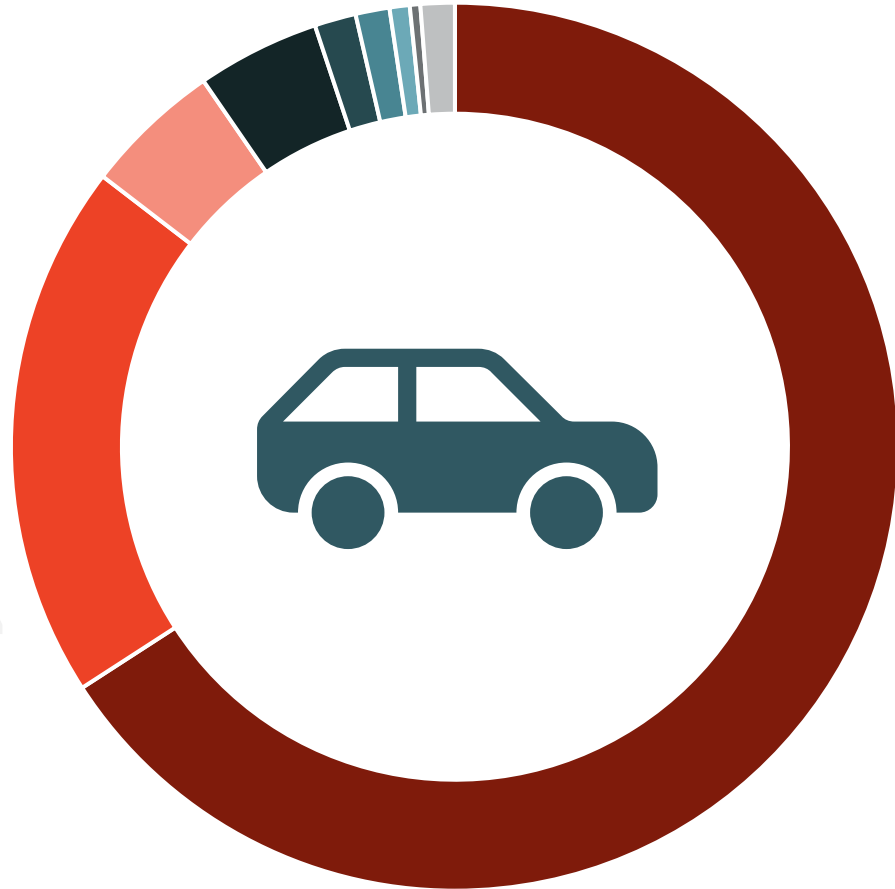
Annual Direct Output



Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics

Balance of SoCal

I-15 IMPACT | 2022 (IN 2025 DOLLARS)



SHARE	INDUSTRY
65.9%	Manufacturing
19.6%	Leisure & Hospitality
5.0%	Professional & Business Services
4.5%	Wholesale Trade
1.5%	Education & Health Services
1.2%	Information
0.7%	Agriculture
0.4%	Financial Activities
1.2%	All Other Sectors

Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics

ECONOMIC OVERVIEW

SHUTDOWN IMPACT

RIPPLE EFFECT

OTHER CONSIDERATIONS

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All Counties

SHUTDOWN IMPACT | 2022 (IN 2025 DOLLARS)



\$2.5M
One Hour



\$15.2M
Six Hours



\$121.6M
Two Days



\$1.8B
One Month



Source: Applied Analysis; IMPLAN; LVCVA; Visit California; U.S. Bureau of Transportation Statistics

Clark County

SHUTDOWN IMPACT | 2022 (IN 2025 DOLLARS)



\$310K
One Hour



\$1.9M
Six Hours



\$14.9M
Two Days



\$223.4M
One Month



Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics

Clark County

SHUTDOWN IMPACT | 2022 (IN 2025 DOLLARS)



Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics

San Bernardino County

SHUTDOWN IMPACT | 2022 (IN 2025 DOLLARS)



\$277K
One Hour



\$1.7M
Six Hours



\$13.3M
Two Days



\$199.9M
One Month



Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics

Balance of SoCal

SHUTDOWN IMPACT | 2022 (IN 2025 DOLLARS)



\$759K
One Hour



\$4.6M
Six Hours



\$36.4M
Two Days



\$546.5M
One Month



Source: Applied Analysis; IMPLAN; Visit California; U.S. Bureau of Transportation Statistics

ECONOMIC OVERVIEW

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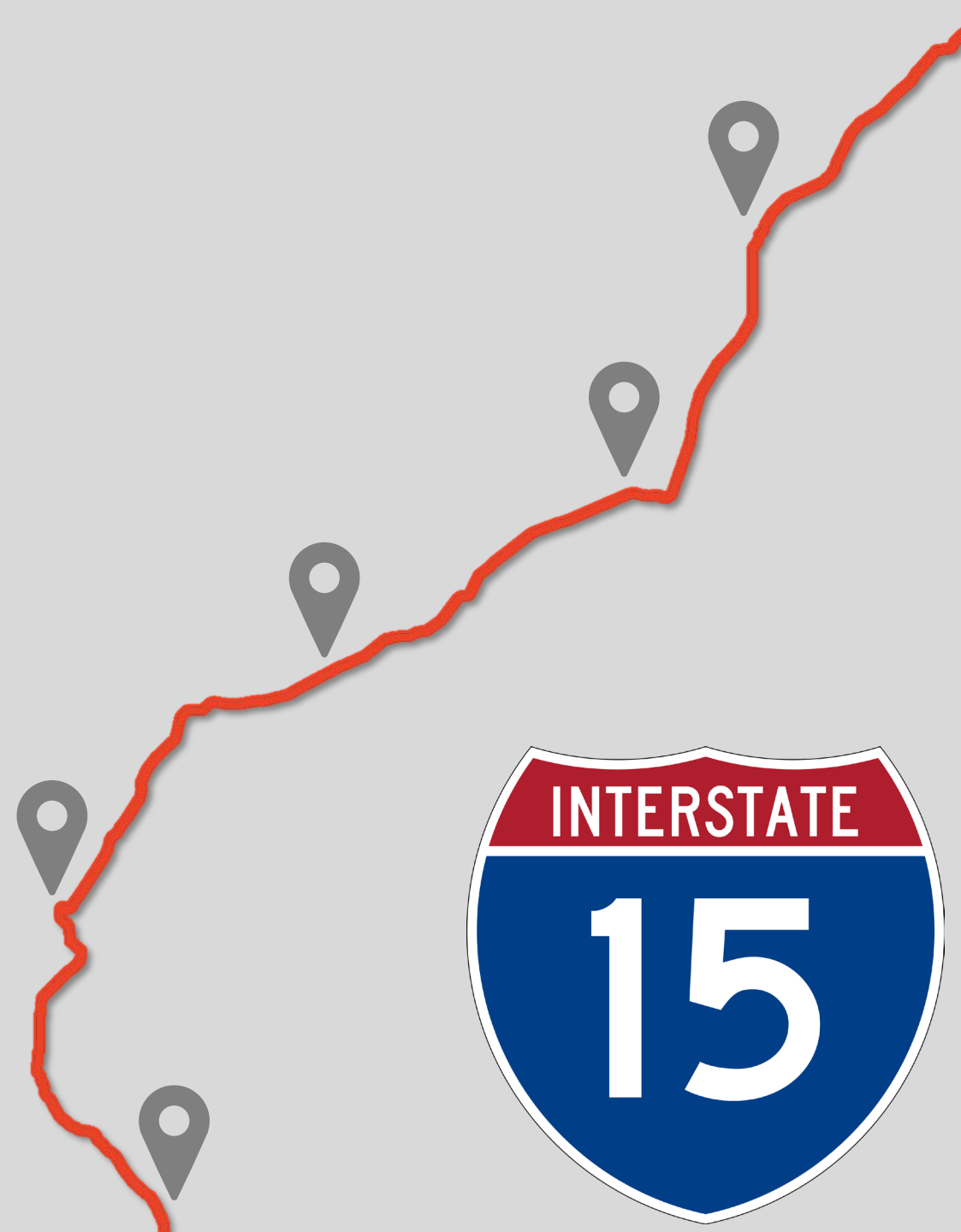
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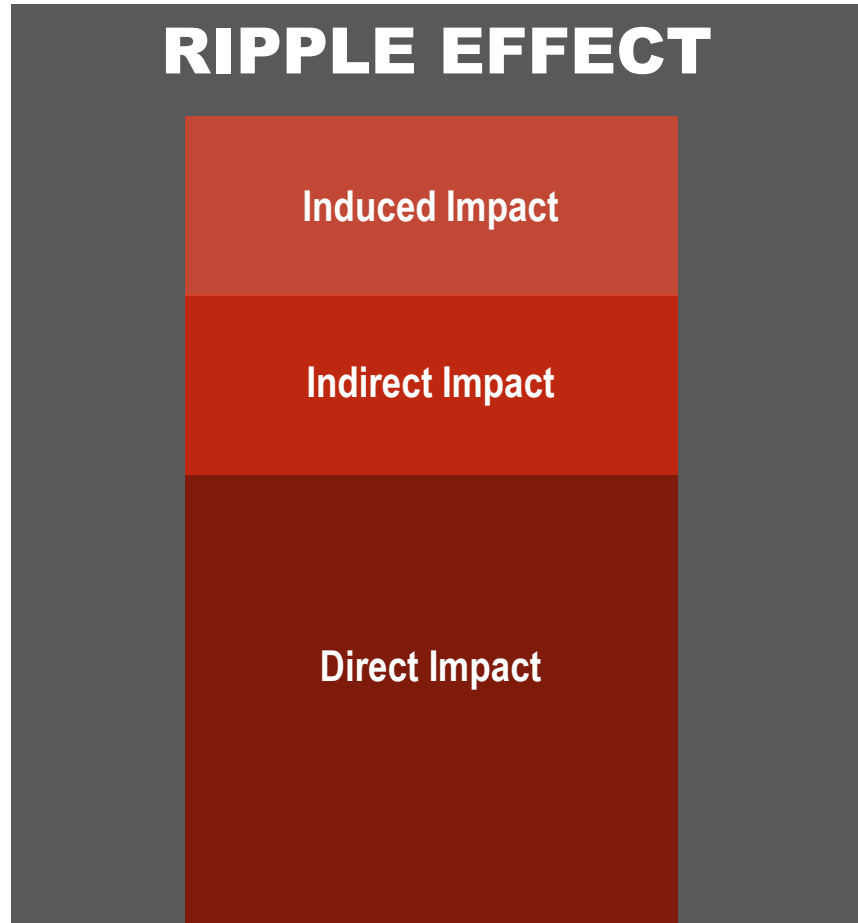
Economic Impact Analysis

IMPLAN METHODOLOGY



IMPLAN MODEL

- 1 of 3 nationally recognized impact analysis software tools
- Developed by Minnesota IMPLAN Group, Inc. and used by more than 1,000 public and private institutions
- IMPLAN is an input-output model that utilizes complex economic equations to explain how the “outputs” of one industry become the “inputs” of others, and vice versa
- This relationship is sometimes referred to as the “multiplier effect,” illustrating how changes in one sector of the economy can affect other sectors



Economic Impact Analysis

IMPLAN METHODOLOGY

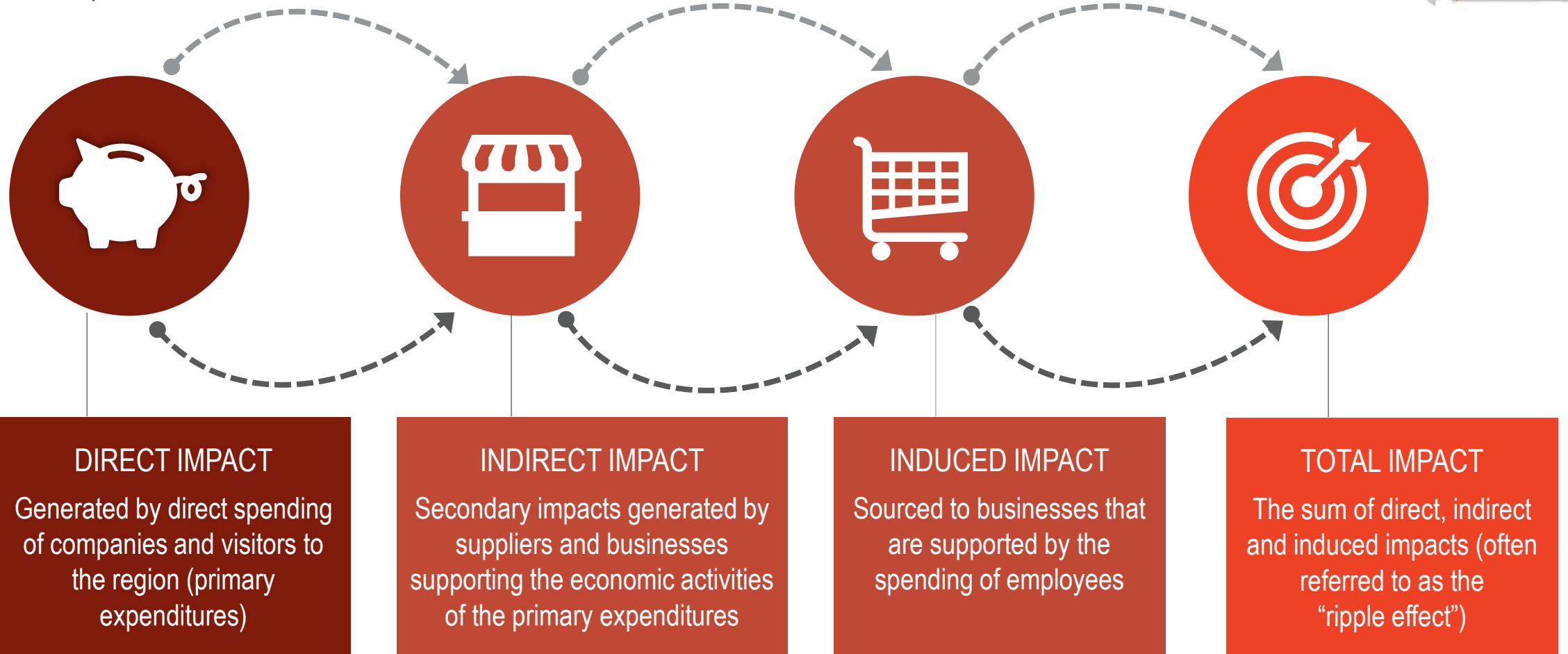


LIMITATIONS AND ASSUMPTIONS

- Input-output models, as is the case with all econometric models, are not without their limitations; the statistical model used in this analysis, IMPLAN, for example, assumes that capital and labor are used in fixed proportions
- This means that for every job created or lost, a fixed change in investment, income and employment results
- In reality, developers, consumers and governments respond to stimuli in complex ways, including changing the mix of capital or labor as well as the types and frequencies of investment
- Importantly, each impacting force has its own unique characteristics, affecting how consumers and businesses respond to the given change

The Ripple Effect

DIRECT, INDIRECT AND INDUCED IMPACTS



Annual Impact of I-15 Trade

ALL COUNTIES



	Direct	Indirect	Induced	Total
ECONOMIC OUTPUT				
Clark County	\$13.1B	\$3.6B	\$4.4B	\$21.1B
SoCal (All Counties)	\$9.1B	\$2.4B	\$1.8B	\$13.2B
Total	\$22.2B	\$6.0B	\$6.1B	\$34.3B
SALARIES & WAGES				
Clark County	\$4.7B	\$1.2B	\$1.4B	\$7.2B
SoCal (All Counties)	\$2.3B	\$0.9B	\$0.6B	\$3.8B
Total	\$7.0B	\$2.0B	\$2.0B	\$11.0B
EMPLOYMENT ^[1]				
Clark County	73,913 Jobs	17,637 Jobs	23,759 Jobs	115,320 Jobs
SoCal (All Counties)	29,953 Jobs	11,308 Jobs	9,930 Jobs	51,192 Jobs
Total	103,867 Jobs	28,946 Jobs	33,690 Jobs	166,502 Jobs

Source: Applied Analysis; IMPLAN; LVCVA; Visit California; U.S. Bureau of Transportation Statistics. Note: [1] Employment impacts are stated in person-years of employment (i.e., one person employed full-time for one year).

Annual Impact of I-15 Trade

CLARK COUNTY & SAN BERNARDINO COUNTY



	Direct	Indirect	Induced	Total
ECONOMIC OUTPUT				
Clark County	\$2.7B	\$0.9B	\$0.9B	\$4.5B
San Bernardino County	\$2.4B	\$0.5B	\$0.3B	\$3.3B
Total	\$5.2B	\$1.4B	\$1.2B	\$7.8B
SALARIES & WAGES				
Clark County	\$0.9B	\$0.3B	\$0.3B	\$1.5B
San Bernardino County	\$0.6B	\$0.02B	\$0.1B	\$0.9B
Total	\$1.6B	\$0.5B	\$0.4B	\$2.4B
EMPLOYMENT ^[1]				
Clark County	16,944 Jobs	4,464 Jobs	4,916 Jobs	26,324 Jobs
San Bernardino County	8,398 Jobs	3,126 Jobs	2,123 Jobs	13,647 Jobs
Total	25,343 Jobs	7,590 Jobs	7,039 Jobs	39,971 Jobs

Source: Applied Analysis; IMPLAN; LVCVA; Visit California; U.S. Bureau of Transportation Statistics. Note: [1] Employment impacts are stated in person-years of employment (i.e., one person employed full-time for one year).

Annual Impact of I-15 Trade

CLARK COUNTY & BALANCE OF SOCAL



	Direct	Indirect	Induced	Total
ECONOMIC OUTPUT				
Clark County	\$10.4B	\$2.7B	\$3.5B	\$16.6B
Balance of SoCal	\$6.6B	\$1.9B	\$1.4B	\$9.9B
Total	\$17.0B	\$4.6B	\$4.9B	\$26.5B
SALARIES & WAGES				
Clark County	\$3.8B	\$0.9B	\$1.1B	\$5.7B
Balance of SoCal	\$1.7B	\$0.7B	\$0.5B	\$2.9B
Total	\$5.4B	\$1.6B	\$1.6B	\$8.6B
EMPLOYMENT ^[1]				
Clark County	56,969 Jobs	13,174 Jobs	18,844 Jobs	88,986 Jobs
Balance of SoCal	21,555 Jobs	8,182 Jobs	7,808 Jobs	37,545 Jobs
Total	78,524 Jobs	21,356 Jobs	26,651 Jobs	126,531 Jobs

Source: Applied Analysis; IMPLAN; LVCVA; Visit California; U.S. Bureau of Transportation Statistics. Note: [1] Employment impacts are stated in person-years of employment (i.e., one person employed full-time for one year).

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Recession Impact

CLARK COUNTY | ANNUAL GDP DECREASE



Source: Applied Analysis; IMPLAN; LVCVA; U.S. Bureau of Transportation Statistics; U.S. Bureau of Economic Analysis.

Note: COVID-19 represents Las Vegas MSA decrease in annual GDP from 2019 to 2020; Great Recession represents MSA decrease in GDP from annual 2007 to 2008. Values have been inflation adjusted to 2025 dollars.

The Tipping Point?

Image Source: Tod Seelig / The Guardian

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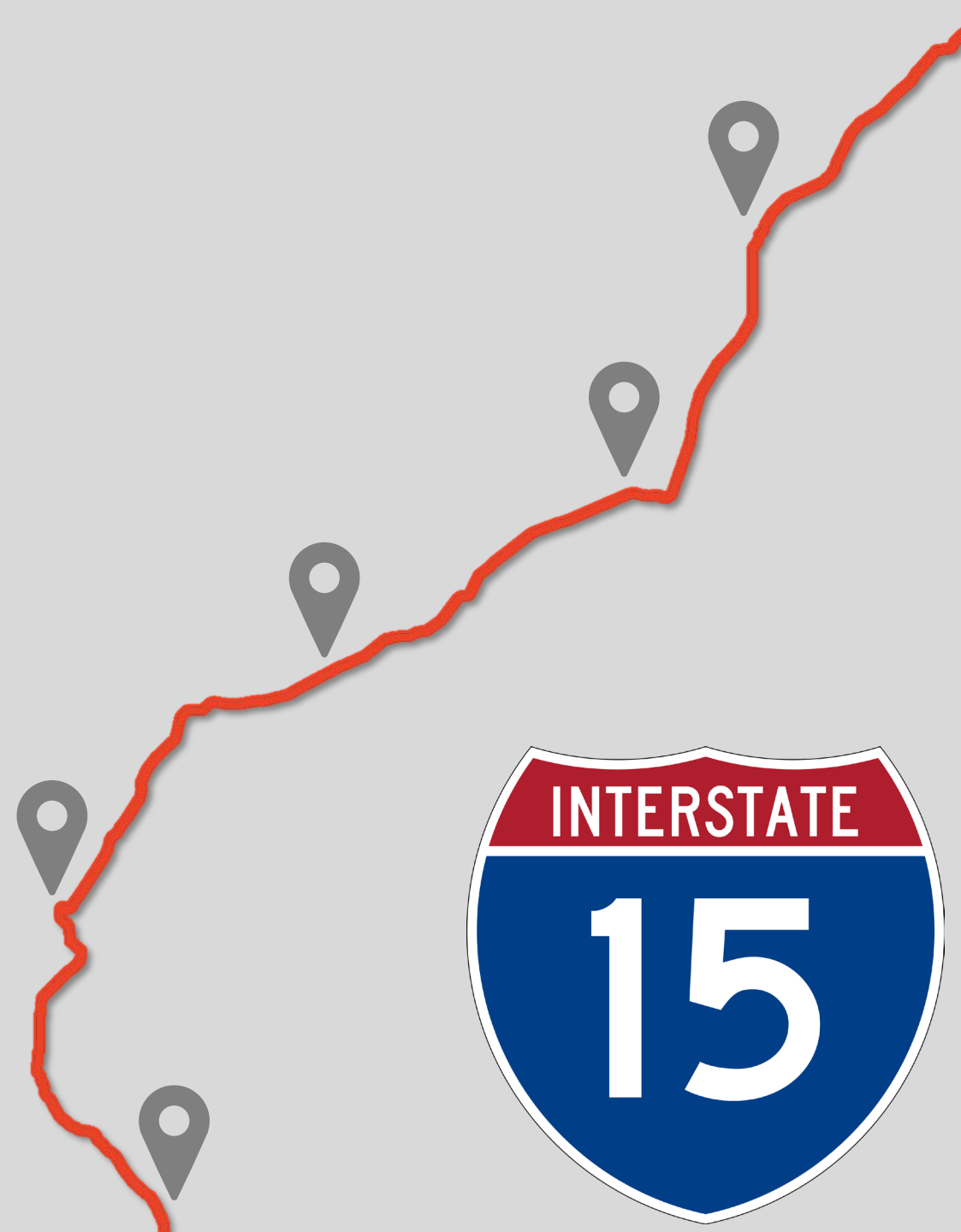
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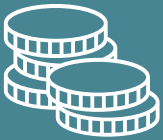


I-15 Analysis

NEXT STEPS



Track past I-15 closures



Analyze intrastate trade impact



Calculate emergency services spending



Gather annual operational and maintenance costs



Assess past and planned infrastructure investments

APPLIED ANALYSIS



For more information, please visit our website at appliedanalysis.com

