DATE:	August 12, 2025
TO:	RTC – SNS Regional Planning Team
FROM:	ECOnorthwest
SUBJECT:	Activity Centers Analysis – Technical Memo

As a part of the broader effort to develop a regional planning strategy for the Southern Nevada region, ECOnorthwest completed an analysis that identified "activity centers" and compared these centers with policy-defined urban centers and transit-oriented communities throughout the region. This analysis will support the Regional Transportation Commission of Southern Nevada's (RTC) efforts as it updates the Southern Nevada Strong Regional Policy Plan, which guides future growth and strives to achieve access to housing, economic opportunity, and transportation choice for all Southern Nevadans.

This memo is technical in nature. It is written for an audience familiar with statistical methods and geospatial analysis. A final report will summarize the results for decision-makers and other interested parties and fully incorporate other aspects of the Activity Centers Analysis.

What is an activity center?

In October 2022, the Brookings Institution released a report entitled *Mapping America's Activity Centers: The Building Blocks of Prosperous, Equitable, and Sustainable Regions*. The report describes a methodology for identifying activity centers using data sets with a national scope so that results are comparable across different regions. The authors note that studies limited to a single region should take a finer-grained approach to the data and methods applied. ECOnorthwest draws on this methodology for our study of the Southern Nevada region, adapting it to the local context as needed.

Activity centers are places where people go when they are not at home. More specifically, they are places that have a diverse mix or concentration of services and uses. They are places where people go to work, shop, learn, get medical care, or recreate. They are often areas of outsized importance to the civic or economic life of a region and identifying and characterizing them helps identify places in the region that are currently valuable to residents and visitors.

Approach and methodology

The process of identifying activity centers starts with understanding and mapping different types of uses across the region and creating a method for measuring the relative concentrations of these uses. The steps ECOnorthwest completed for this analysis are described below.

Identifying and categorizing assets

The first step to identifying activity centers is to categorize the types of non-residential places that exist in a region. In this analysis, we refer to these places as "assets." Assets attract people because they serve some sort of utility, whether it is employment, commerce, community, leisure, education, or healthcare. Not all assets are measured in this analysis due to the large scope of such an undertaking. Instead, the assets Brookings used provided a foundation for this analysis. As suggested by Brookings, ECOnorthwest expanded on some these definitions as feasible to better reflect local conditions in the data used.

To effectively measure the mix of assets in an area, ECOnorthwest first grouped assets into broader categories. Asset categories simplify the huge diversity of particular uses into meaningful groups while also helping to identify concentrations of related uses. This analysis uses five asset categories, described below:

- **Community assets** are places like libraries, community centers, and places of worship that serve as community gathering spaces or places that are free, low-cost, and generally open to all community members.
- **Consumption assets** are places where people go to shop for clothes, eat at a restaurant, or see a movie. In general, they are places where people go to spend money on goods and services.
- **Tourism assets** are noteworthy and regionally unique places that attract visitors from outside the region to Southern Nevada, such as sports venues, casinos, and museums. These assets can also be hotels and motels, which are essential in supporting the flow of tourism in the area.
- **Institutional assets** include universities, hospitals, and state government buildings. They are sometimes large campuses but can also include smaller locations that are used by public sector or public-serving private sector organizations.
- **Economic assets** are places where people go for work. This analysis specifically focuses on "traded sector" employment, which produces goods and services that can be sold and consumed outside the region and are often location-agnostic types of jobs. For this analysis, we adopted Brooking's assumptions about traded sector employment, which assign a traded sector share to each 2-digit NAICS employment sector (e.g. 0% of the Construction industry is assumed to be traded sector, while 88% of the Manufacturing industry is assumed to be traded sector). These traded sector shares are applied to block group-level job counts by industry using LEHD data.

Data sources

ECOnorthwest used the below data sources to identify and provide geospatial information for assets and the specific assets and data sources for each used in this analysis are summarized in Exhibit 1.

- **Clark County GIS Management Office (GISMO) data catalog** was used in certain cases, where the merging of data points from multiple jurisdictions and levels of jurisdictions netted a more comprehensive dataset than other available means. Specifically, this included parks and K—12 schools. However, there are many types of assets that are not available from this source or are themselves not as comprehensive as alternative datasets such as Open Street Map, which ECOnorthwest employs when necessary.
- **Longitudinal Employer-Household Dynamics** (also known as LEHD), maintained by the U.S. Census, includes information on job location by industry.
    - ECOnorthwest referred to the work of J. Bradford Jensen to estimate the share of tradable sector jobs for each North American Industry Classification System (NAICS) code, as described in *Global Trade in Services: Fear, Facts, and Offshoring*. These estimates were applied to employment data from the LEHD.
- **Homeland Infrastructure Foundation-Level Data** (also known as HIFLD) is a dataset maintained by the U.S. Geospatial Management Office. It includes geospatial data on "critical infrastructure" within the United States, including universities and hospitals.
- The **National Register of Historic Places** is maintained by the U.S. National Park Service. Many of these places are destinations for tourism.
- The **Inventory of GSA Owned and Leased Properties** dataset (also known as IOLP) is maintained by the U.S. General Services Administration. The IOLP provides information on federally owned and leased properties across the country, including square footage.
- The **Intermodal Passenger Connectivity Database** (also known as IPCD) is maintained by the U.S. Bureau of Transportation Statistics. It gives information on major transportation terminals in the United States.
- **OpenStreetMap** is a free and open-source service that attempts to map the entire planet at a granular level by leveraging user-submitted data. It has the location of many assets of interest for this analysis and was used extensively to provide location information for assets not included in other data sources.

Exhibit 1. Asset Types and Data Sources

ASSET	DATA SOURCE
Community Assets	
Places of Worship	OpenStreetMap
Libraries	OpenStreetMap

ASSET	DATA SOURCE
Historic Places	National Register of Historic Places
Community Centers	OpenStreetMap
Playgrounds	OpenStreetMap
Schools	RTC Data Catalog
Land Area of Parks	RTC Data Catalog
Consumption Assets	
Healthcare Establishments	OpenStreetMap
Restaurant Establishments	OpenStreetMap
Retail Establishments	OpenStreetMap
Pharmacy Establishments	OpenStreetMap
Arts Centers	OpenStreetMap
Post Offices	OpenStreetMap
Retail Jobs	LEHD
Banks	OpenStreetMap
Tourism Assets	
Hotel Establishments	OpenStreetMap
Museums and Casinos	OpenStreetMap
Sports Venues	OpenStreetMap
Institutional Assets	
Square Feet of Federal Office Space	IOLP
University Students and Faculty	HIFLD
State Capitol Buildings and Municipal City Halls	OpenStreetMap
State, County, and Municipal Courthouses	OpenStreetMap
Hospital Beds	HIFLD
Intercity Train Stations and Airports	IPCD
Economic Assets	
Traded Sector Jobs	LEHD (adjusted for tradable share)

Source: ECOnorthwest

Identifying activity centers

Calculating asset density

The analysis uses 2020 U.S. Census block groups as the geographic unit for measuring concentrations of assets. The block groups were first run through a filter using U.S. Census urban areas to isolate the analysis within city areas, as open, rural areas inordinately affect activity center distribution.

The first step after filtering block groups through the urban areas is to count the assets in each block group. Because block groups can vary significantly in size, we adjusted this measure of assets to be able to identify concentrations rather than simply identifying the

largest block group (which we would expect to have a higher number of assets). To account for varying block group sizes, we divided the counts of assets by the area of the block group to arrive at a density for each specific type of asset.

We also normalized block group-level densities to account for expected variation in the absolute counts of different asset types. For example, traded sector jobs will have higher absolute counts than post offices. Without adjusting for this difference, assets with higher counts would be over-represented in the analysis. We normalized this variation by dividing each asset's density measure by the density of that asset across the entire region. Assets were indexed to the regional density and represented as a ratio. Assets with a score lower than 1 had a lower density in the block group compared to the region as a whole, while assets with scores greater than 1 were more concentrated in the block group compared to the region.

These normalized values for each specific type of asset were summed up for each asset category, giving a single value for each of the five asset categories for each block group. We then calculated a percentile ranking for each asset category score.

Locating concentrated activity

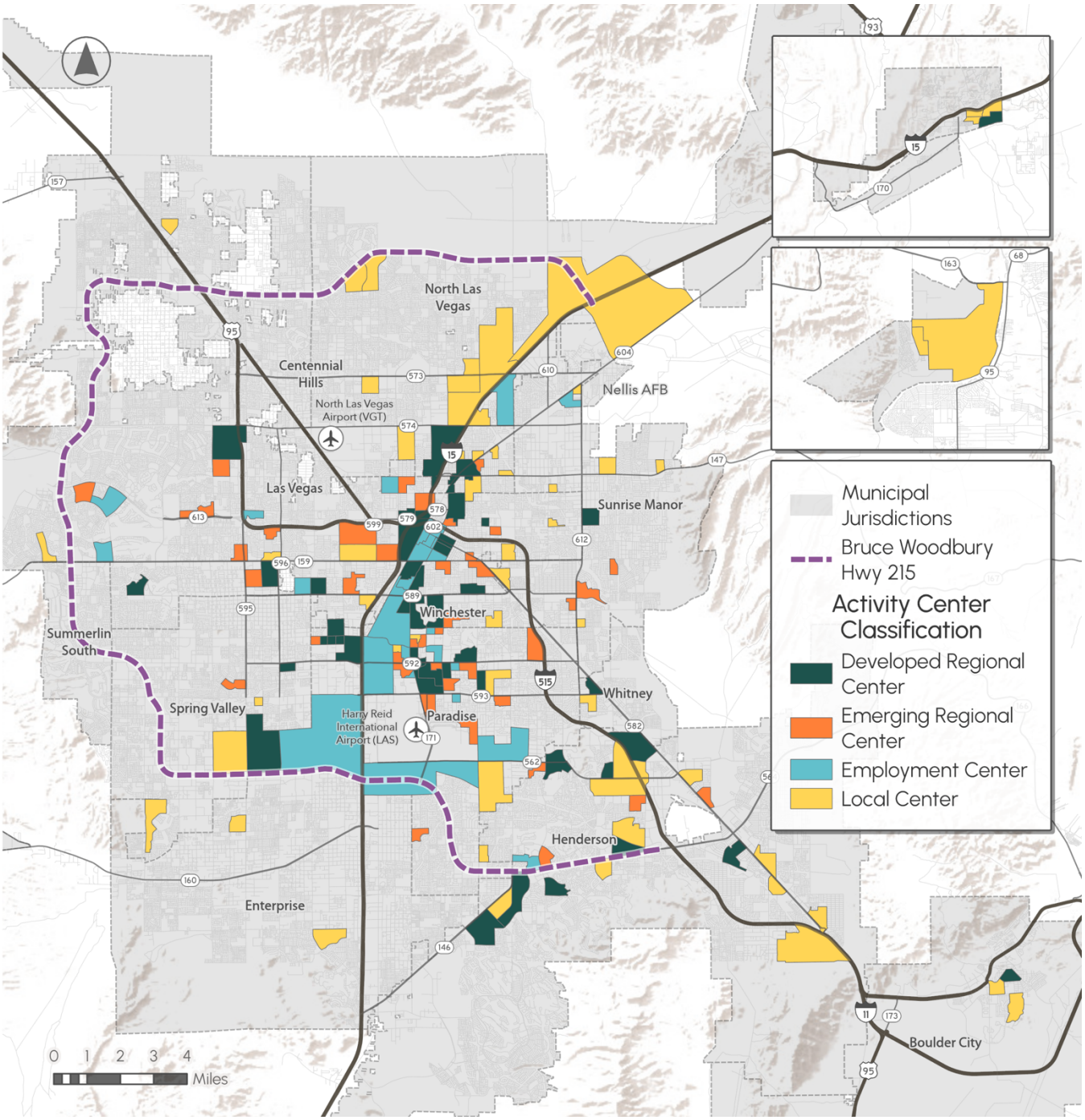
Using these percent ranked values, ECOnorthwest identified four types of activity centers in the Southern Nevada region using thresholds derived in part from the Brookings method but adapted for regional economic development contexts specific to the Southern Nevada region.

- **Developed regional centers** have high concentrations of multiple types of assets. Specifically, block groups with at least two asset categories in the 95th percentile or higher were categorized as regional developed centers.
- **Emerging regional centers** have very high concentrations of one type of asset. Specifically, block groups with exactly one asset category with a 95th percentile or higher concentration were classified as regional emerging centers.
- **Employment centers** have a high concentration of economic assets, with a concentration of traded sector jobs in at least the 98th percentile
- The centers described above are scored on a regional basis in which their percentile scores are calculated against the entire set of regional block groups. **Local centers**, however, are scored only against other block groups in each jurisdiction. This allows more sensitivity to local economic strengths that may not show up under a regional lens. To be classified as a local center, a block group must have one or more assets in the 94th percentile for their jurisdiction (the five incorporated cities plus unincorporated Clark County) and are not already identified as a regional or employment center. Local centers can show smaller concentrations of assets that meaningful contribute to local access, but do not meet a threshold for regional activity. These areas can also show early asset activity from recent city, regional, and partner investments in identified growth areas.

Results

Exhibit 2 shows the results of the activity centers analysis mapped across the Southern Nevada region.

Exhibit 2. Map of Activity Centers within Southern Nevada Region



Source: ECOnorthwest