

THE “NEW NEVADA”

IMAGINING WHAT COMES NEXT



APPLIED
ANALYSIS 

July 17, 2013

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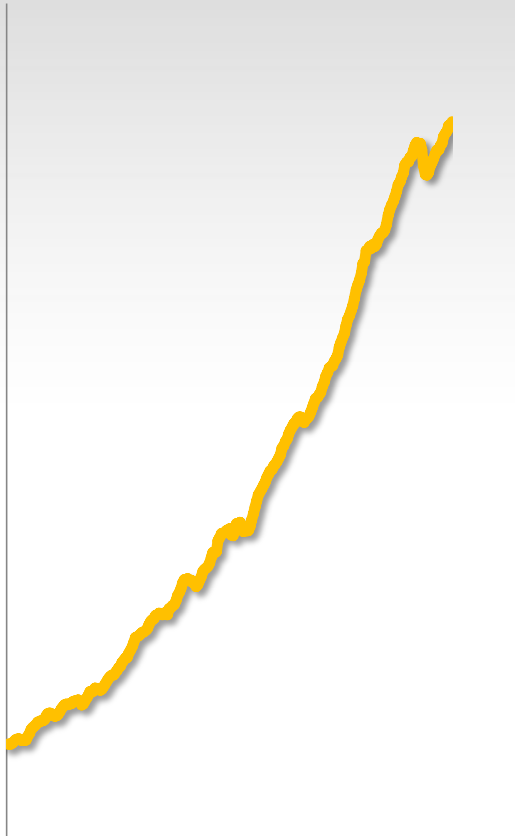
GENERAL OVERVIEW OF NEVADA'S ECONOMY



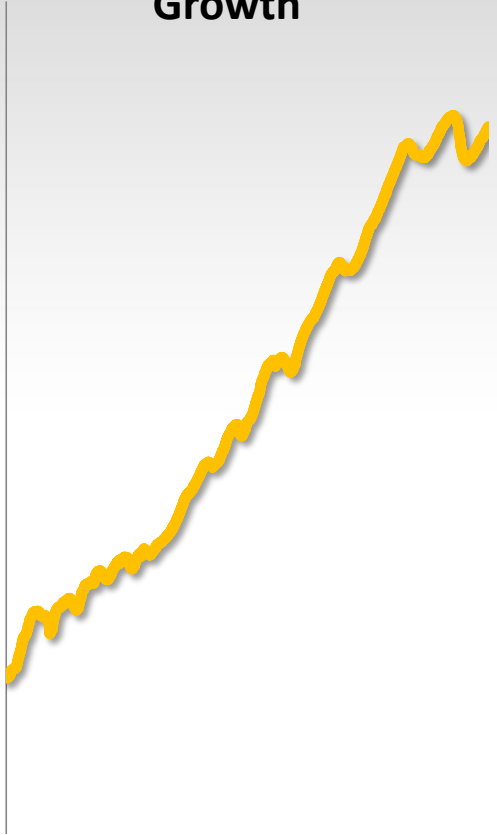
THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

APPLIED
ANALYSIS 

Real GDP



Employment Growth



S&P 500



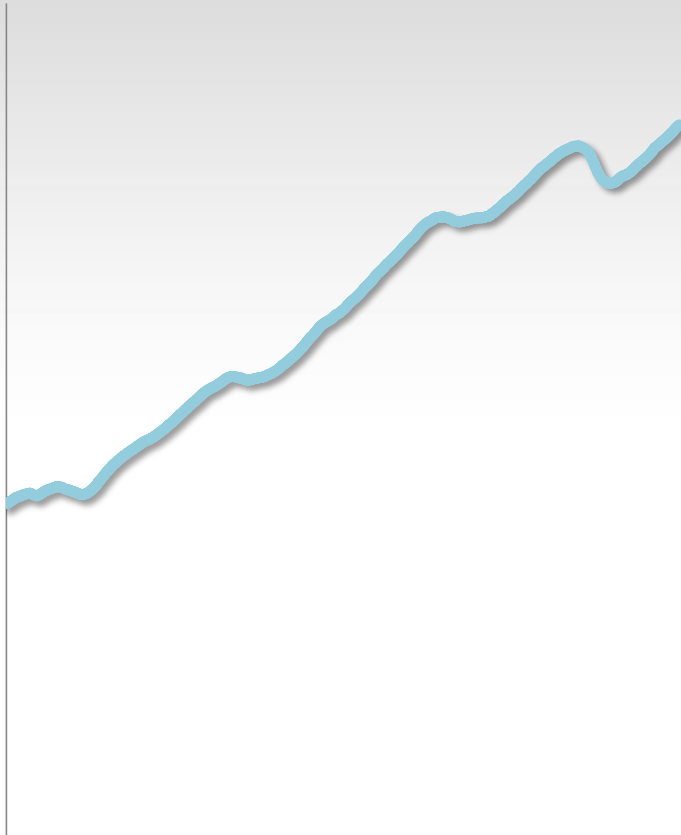
THE "NEW NEVADA"
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General Overview of Nevada's Economy

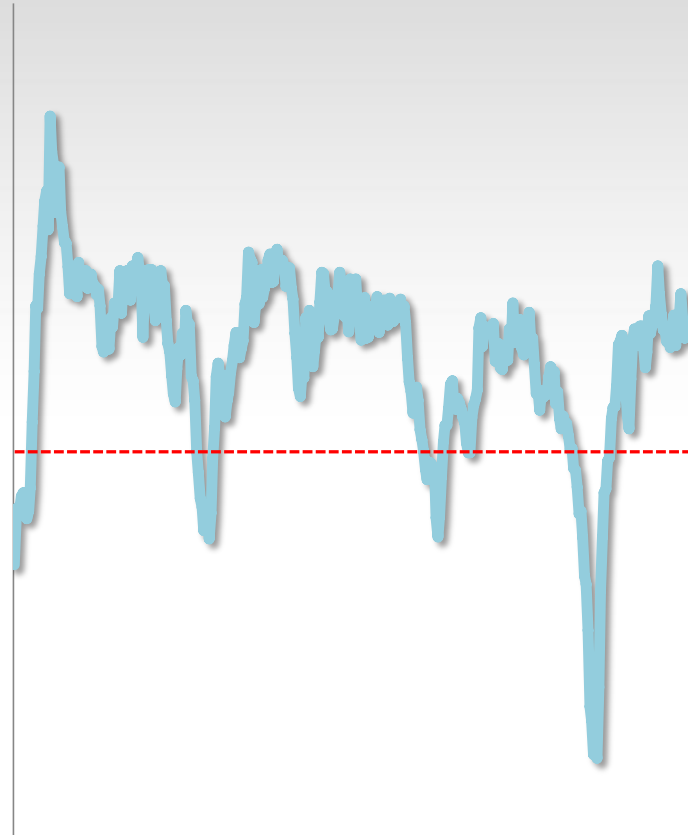
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Coincident Index



Leading Index

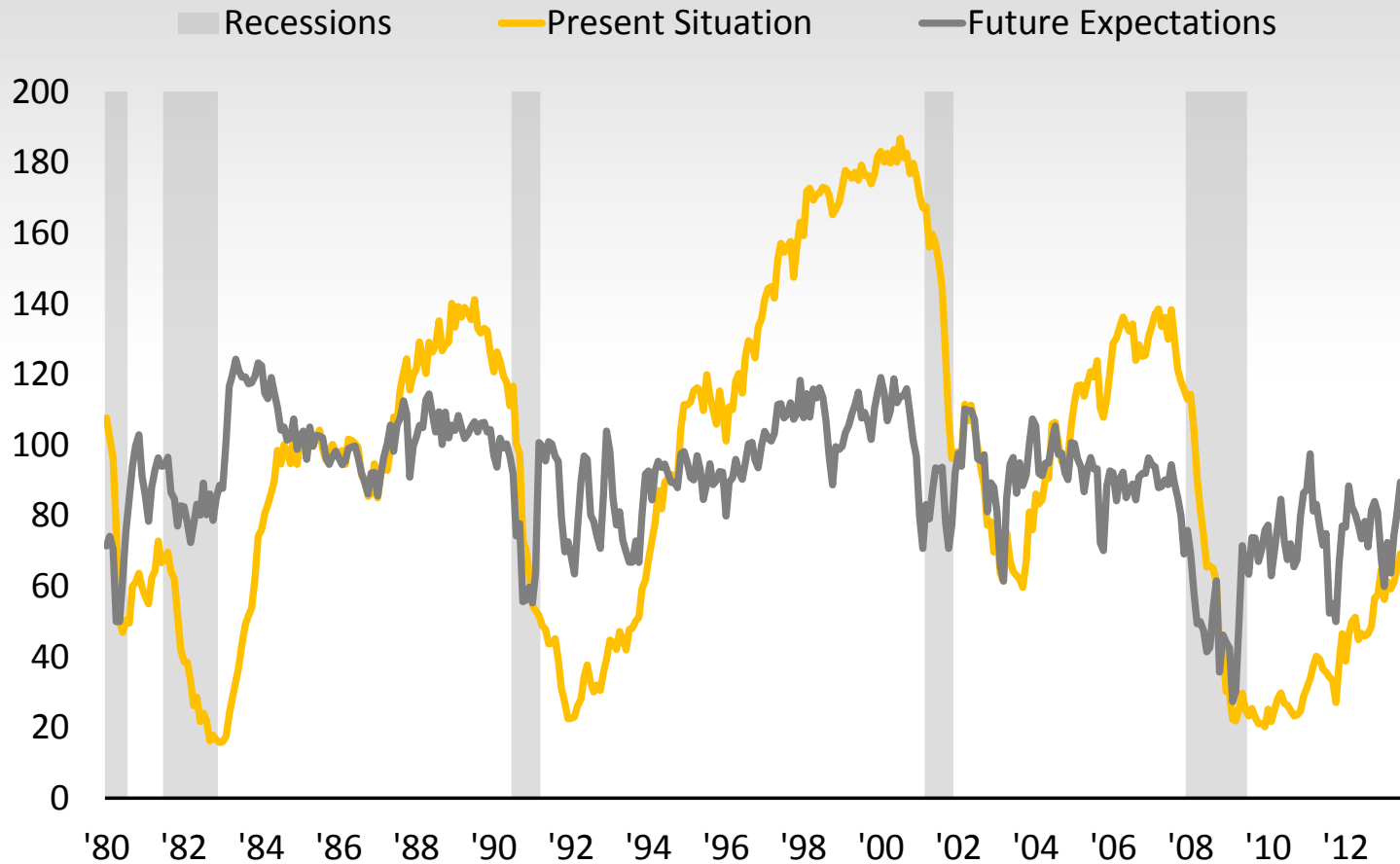


THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy

APPLIED ANALYSIS 

Consumer Confidence Index



THE "NEW NEVADA"
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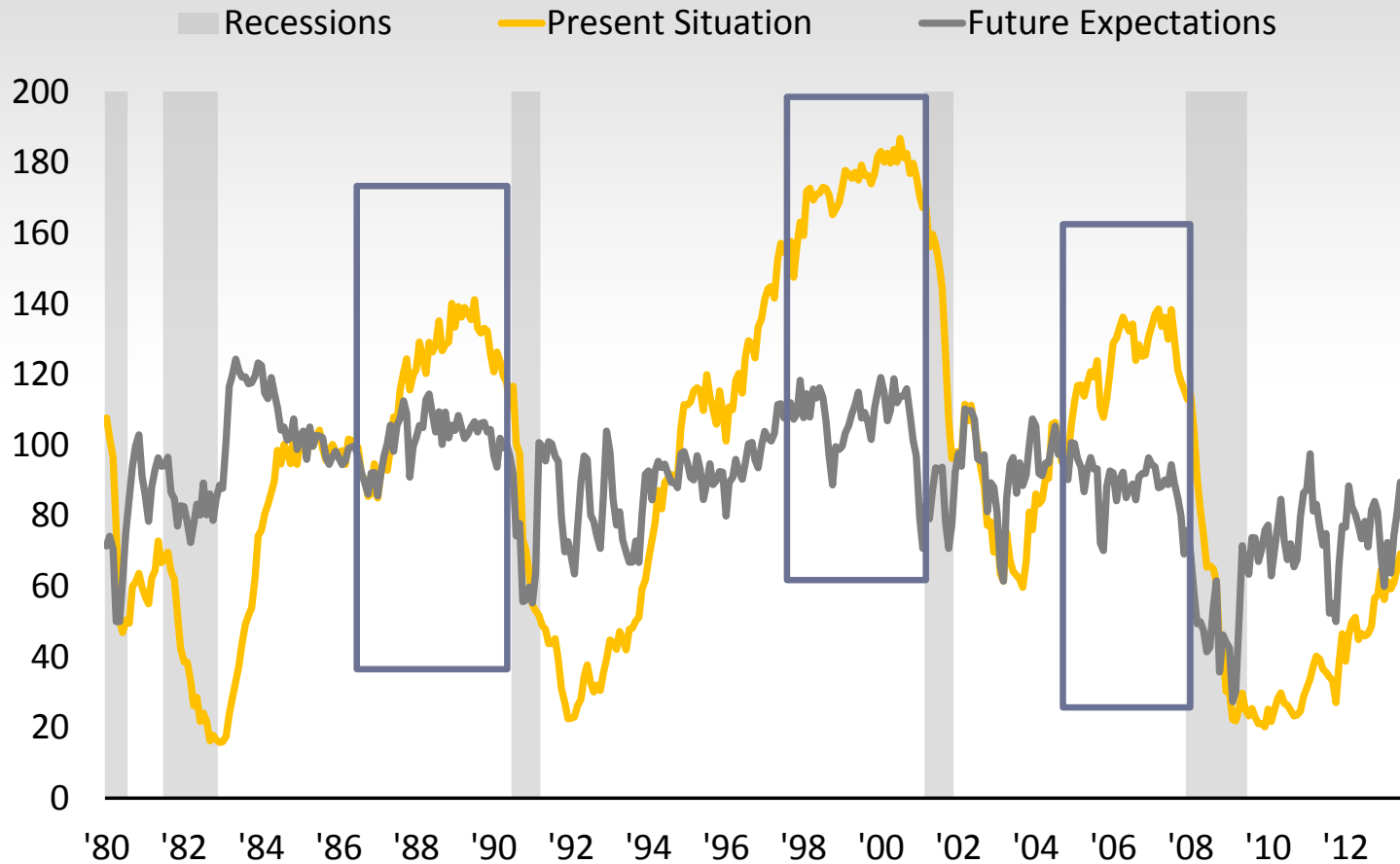
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Consumer Confidence Index



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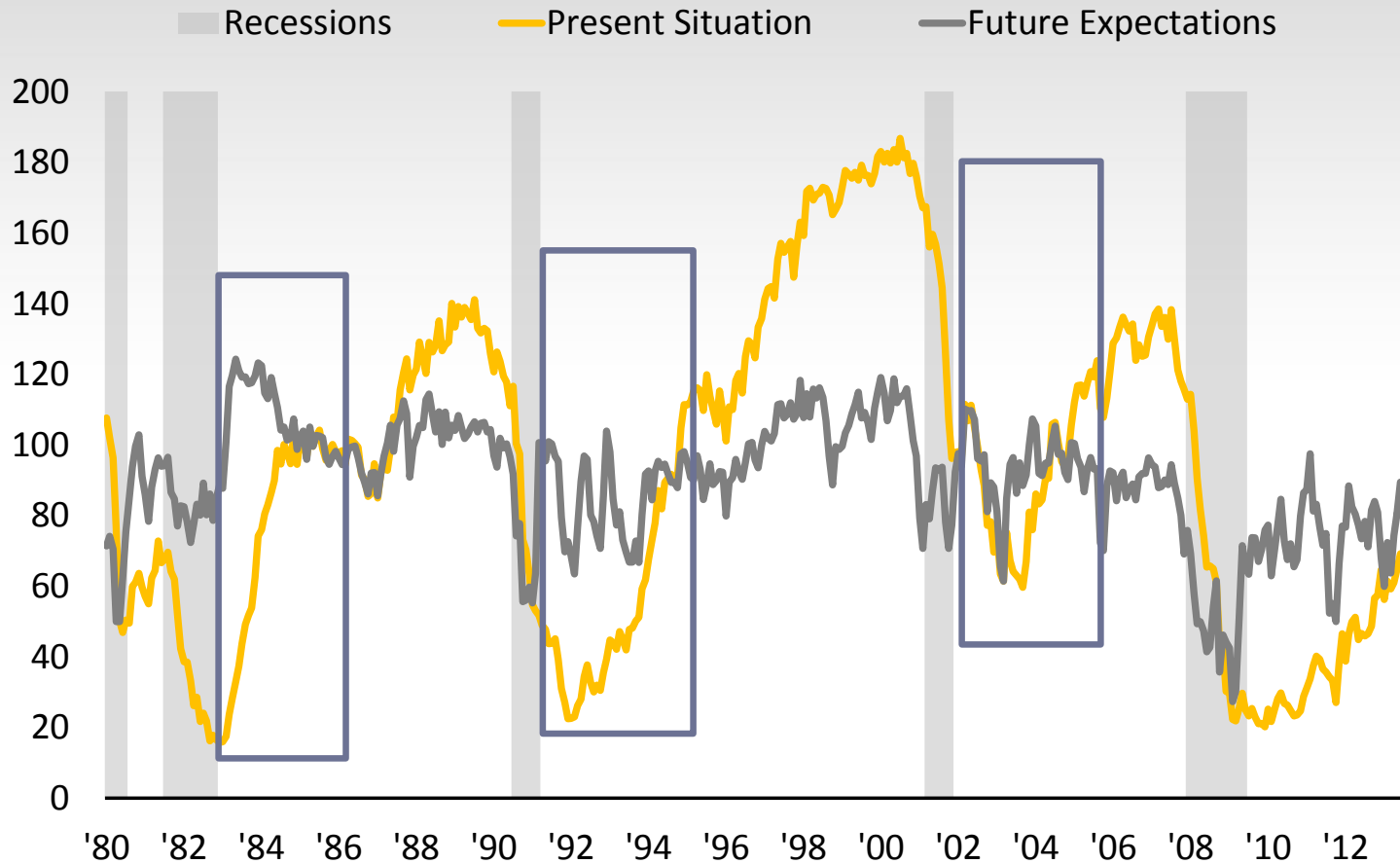
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Consumer Confidence Index



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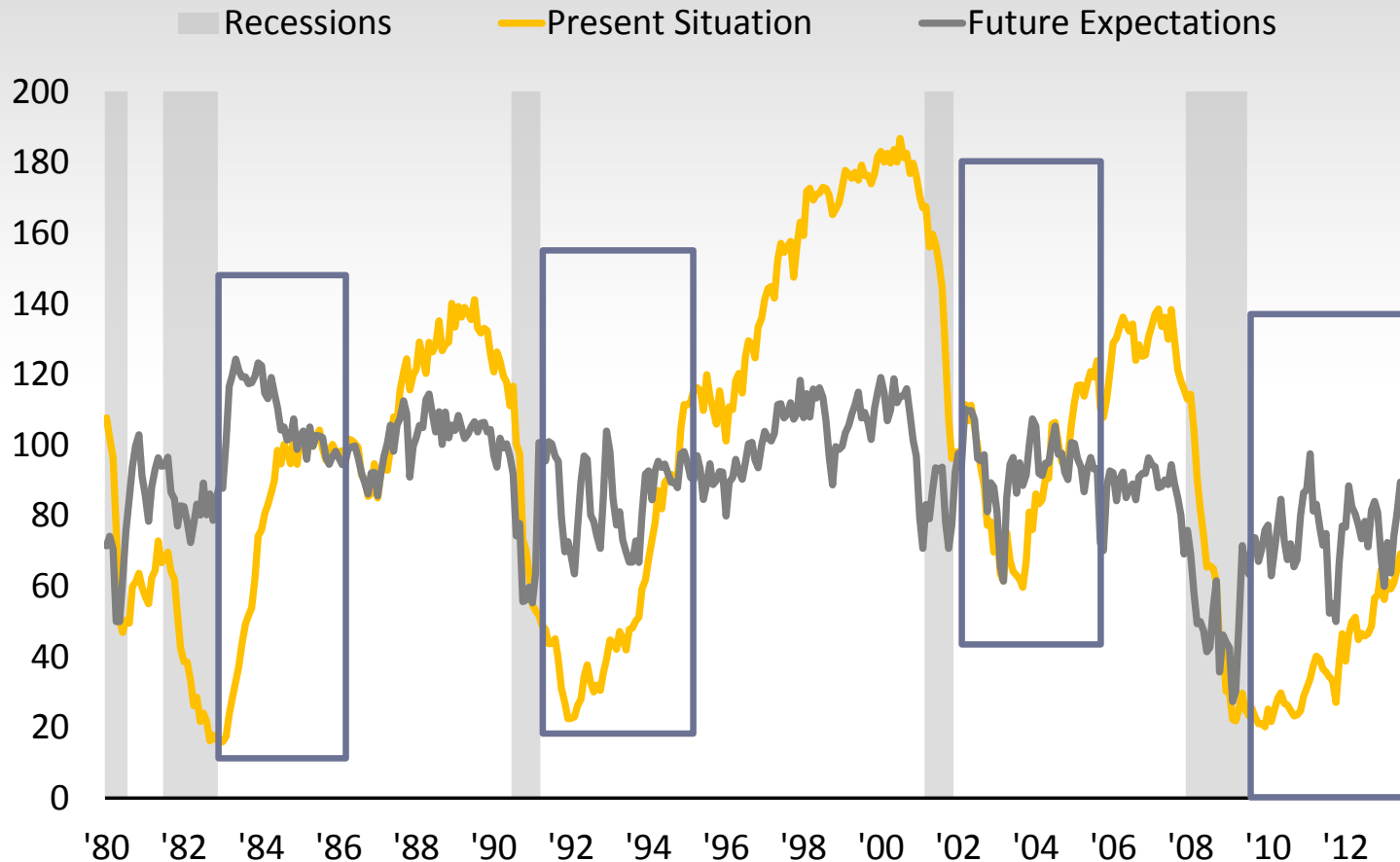
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Consumer Confidence Index



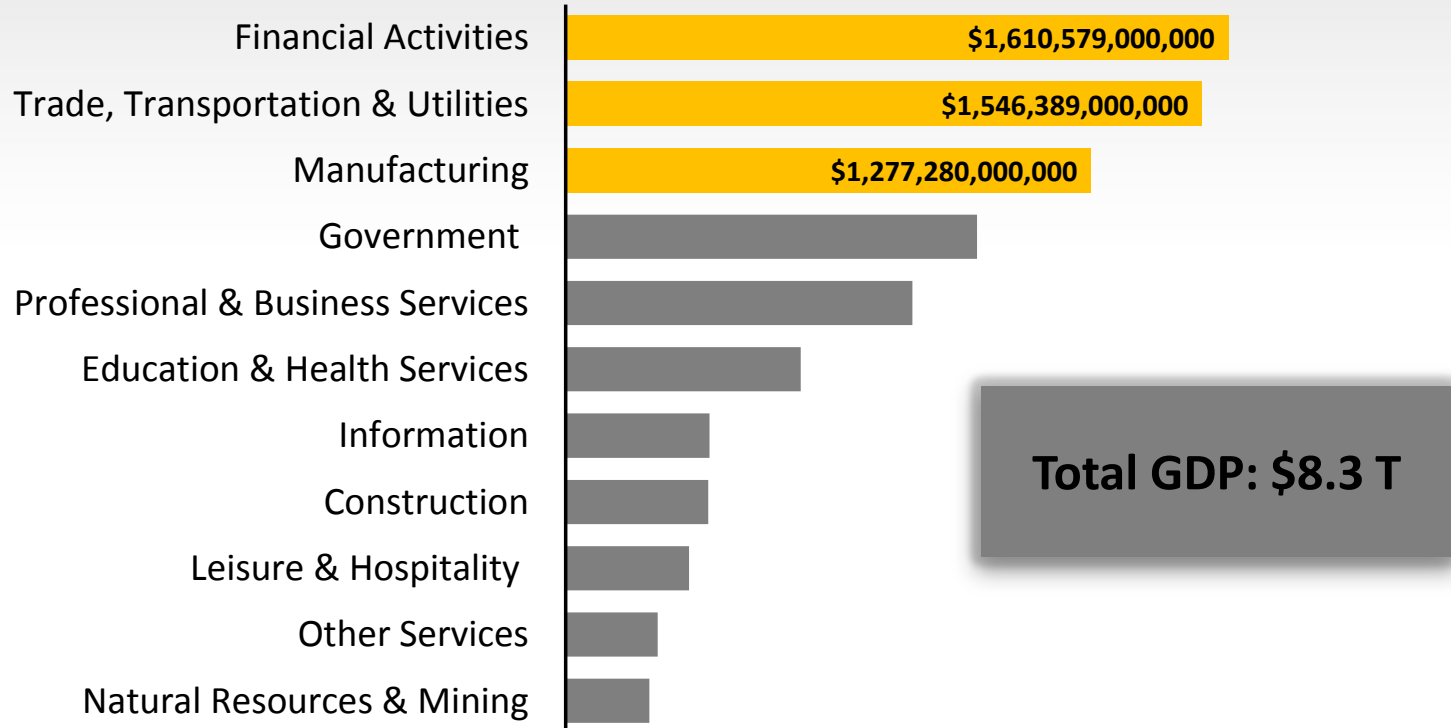
THE "NEW NEVADA"
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General Overview of Nevada's Economy

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U.S. Gross Domestic Product: 1997

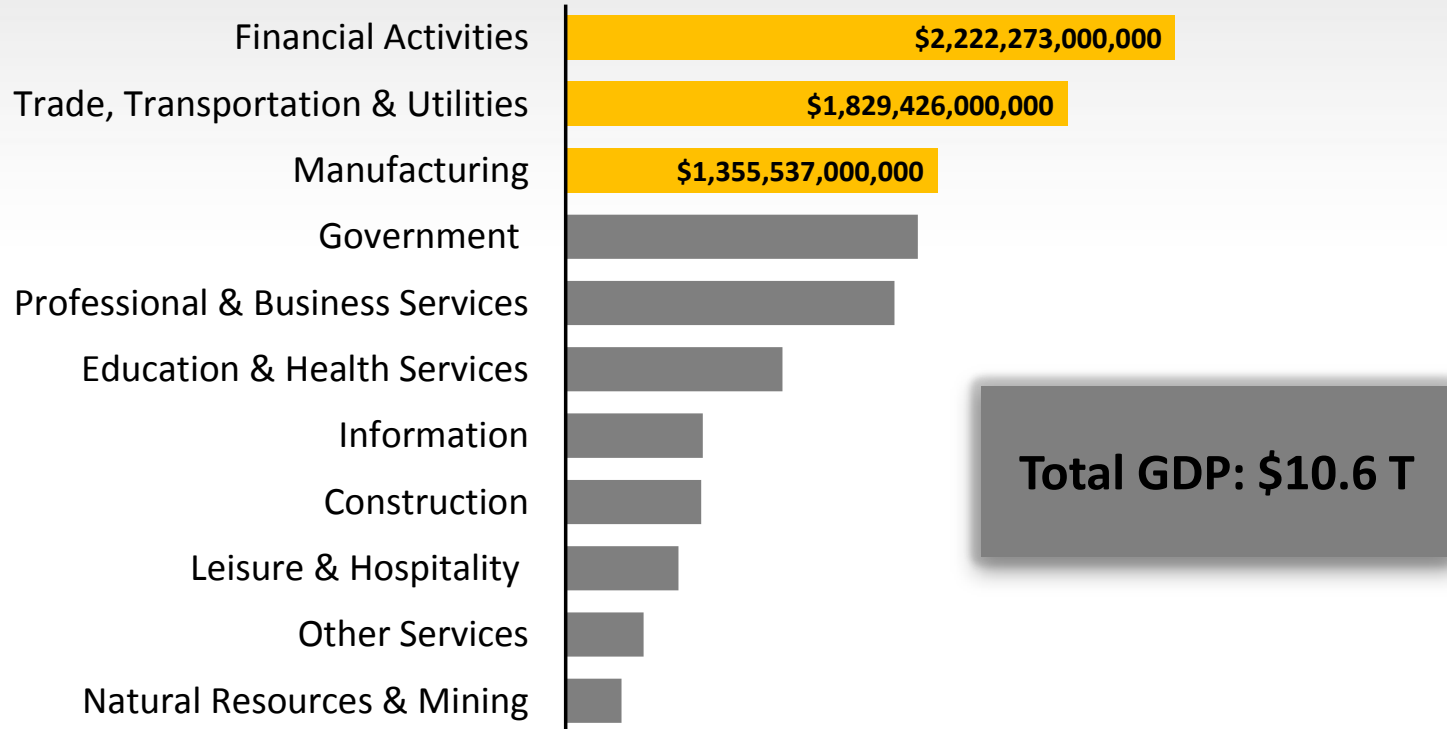


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General Overview of Nevada's Economy

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U.S. Gross Domestic Product: 2002

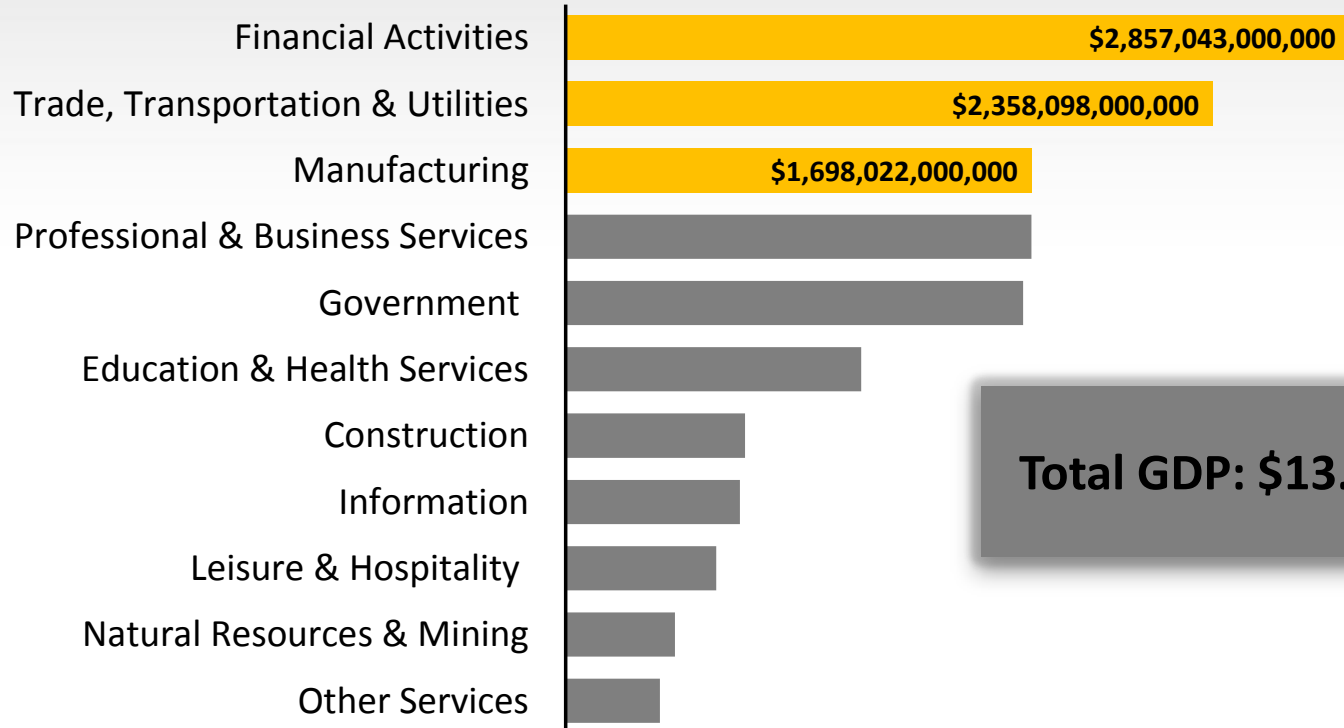


THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy



U.S. Gross Domestic Product: 2007



Total GDP: \$13.9 T

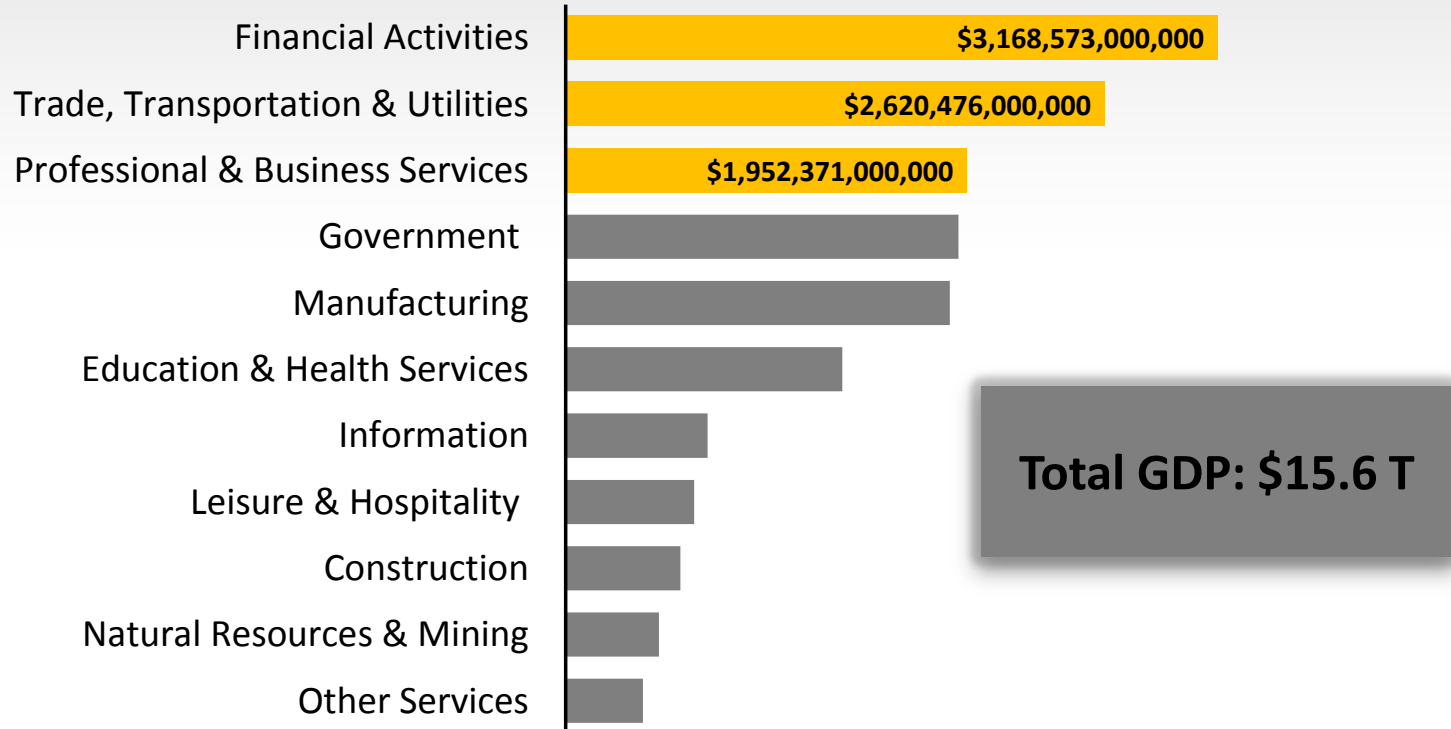


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U.S. Gross Domestic Product: 2012

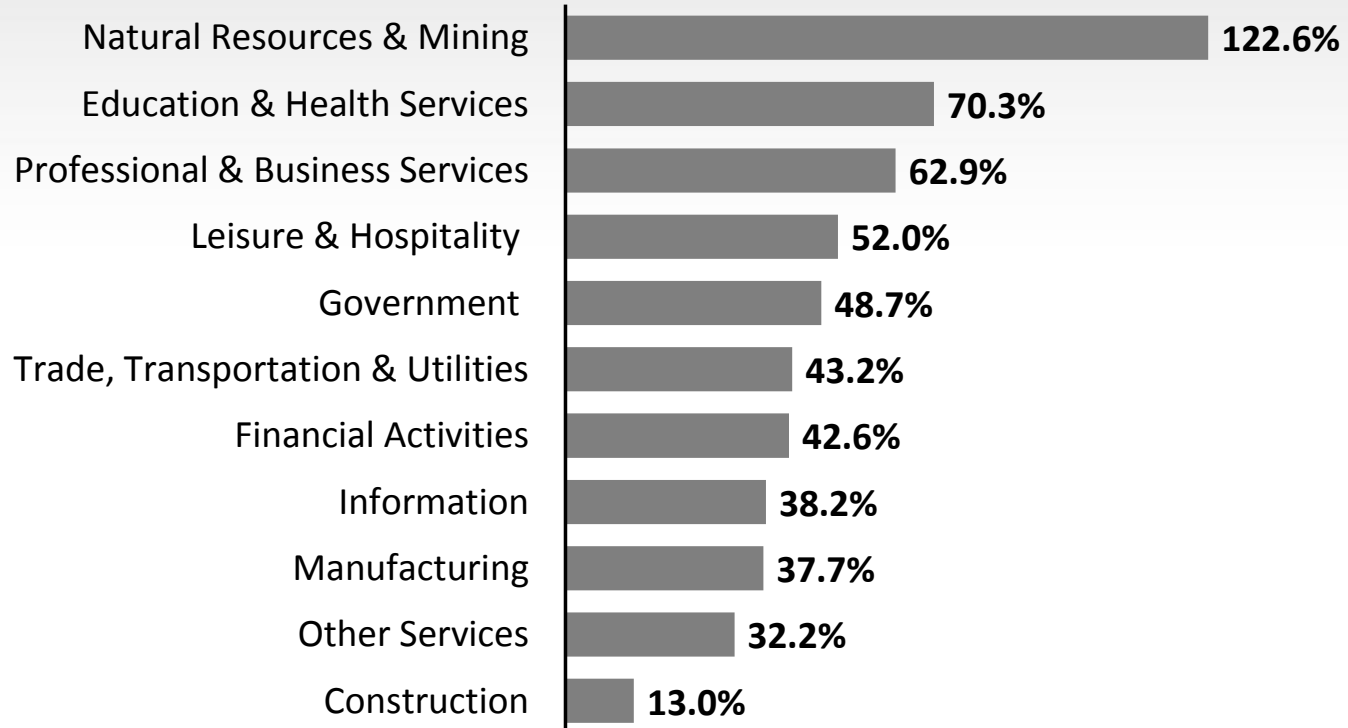


THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy

APPLIED ANALYSIS

U.S. Gross Domestic Product 10-Year Growth

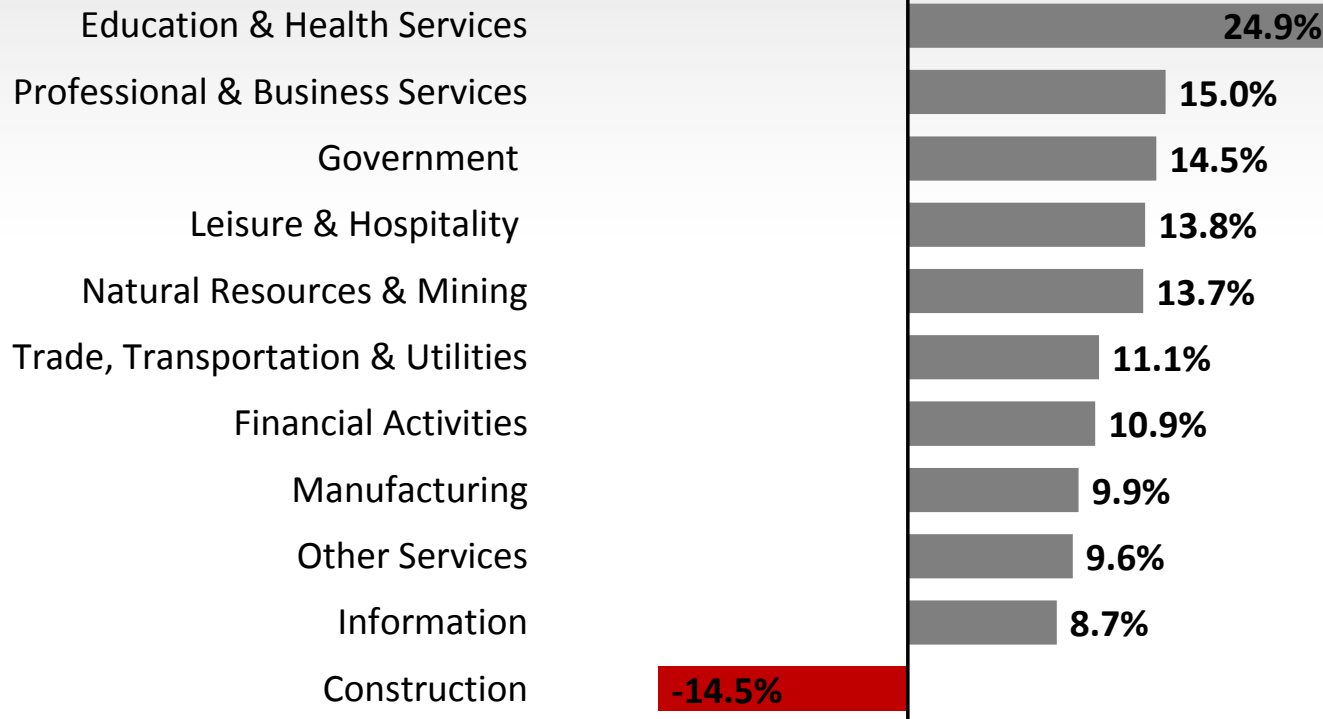


THE "NEW NEVADA"
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General Overview of Nevada's Economy

APPLIED ANALYSIS

U.S. Gross Domestic Product 5-Year Growth

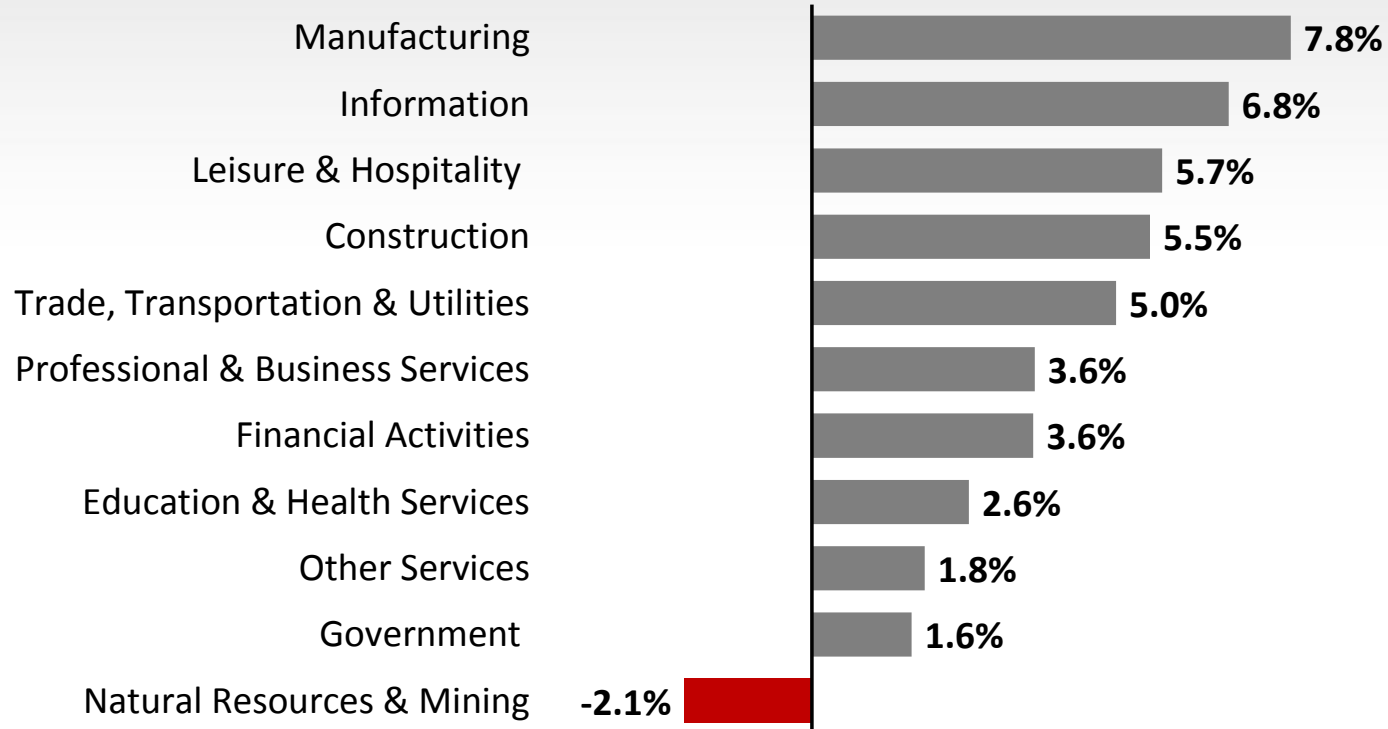


THE "NEW NEVADA"
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General Overview of Nevada's Economy

APPLIED ANALYSIS

U.S. Gross Domestic Product 1-Year Growth

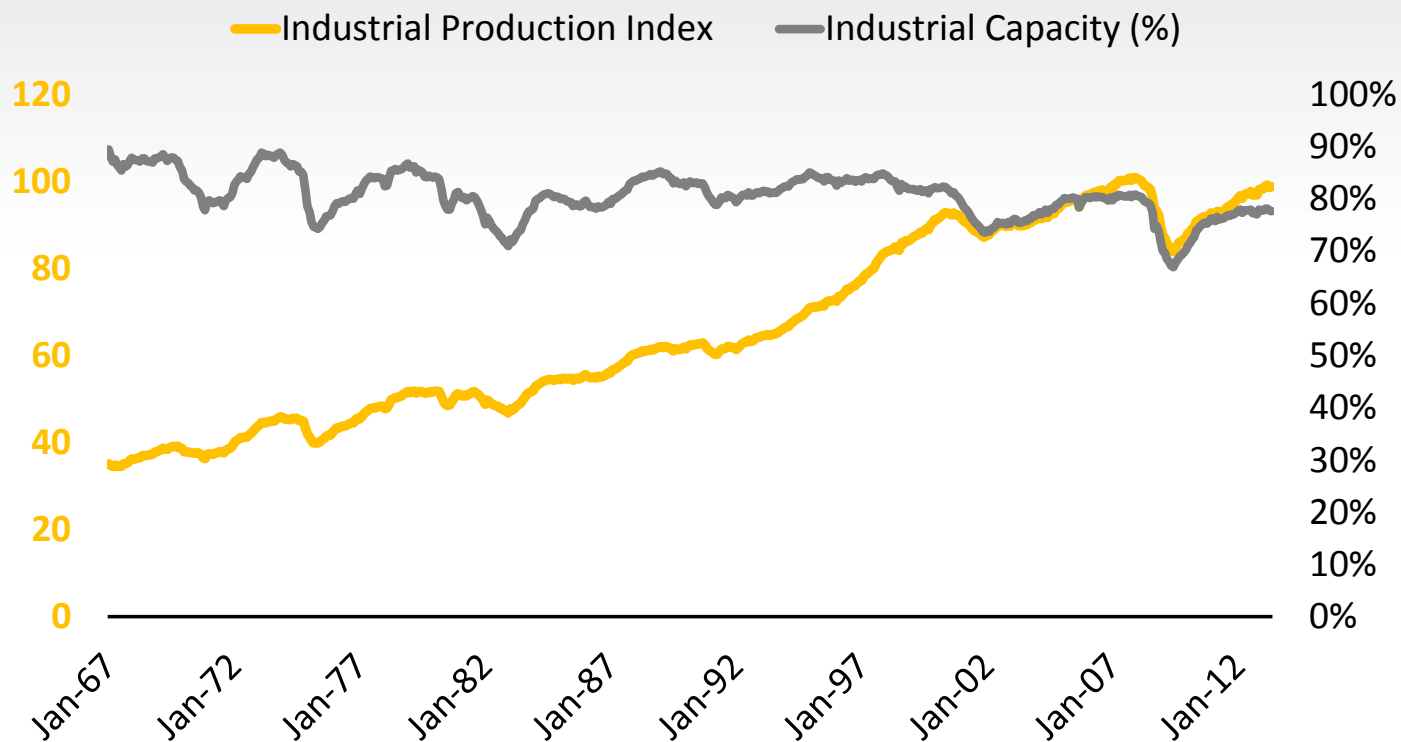


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General Overview of Nevada's Economy

APPLIED ANALYSIS

Industrial Capacity and Productivity



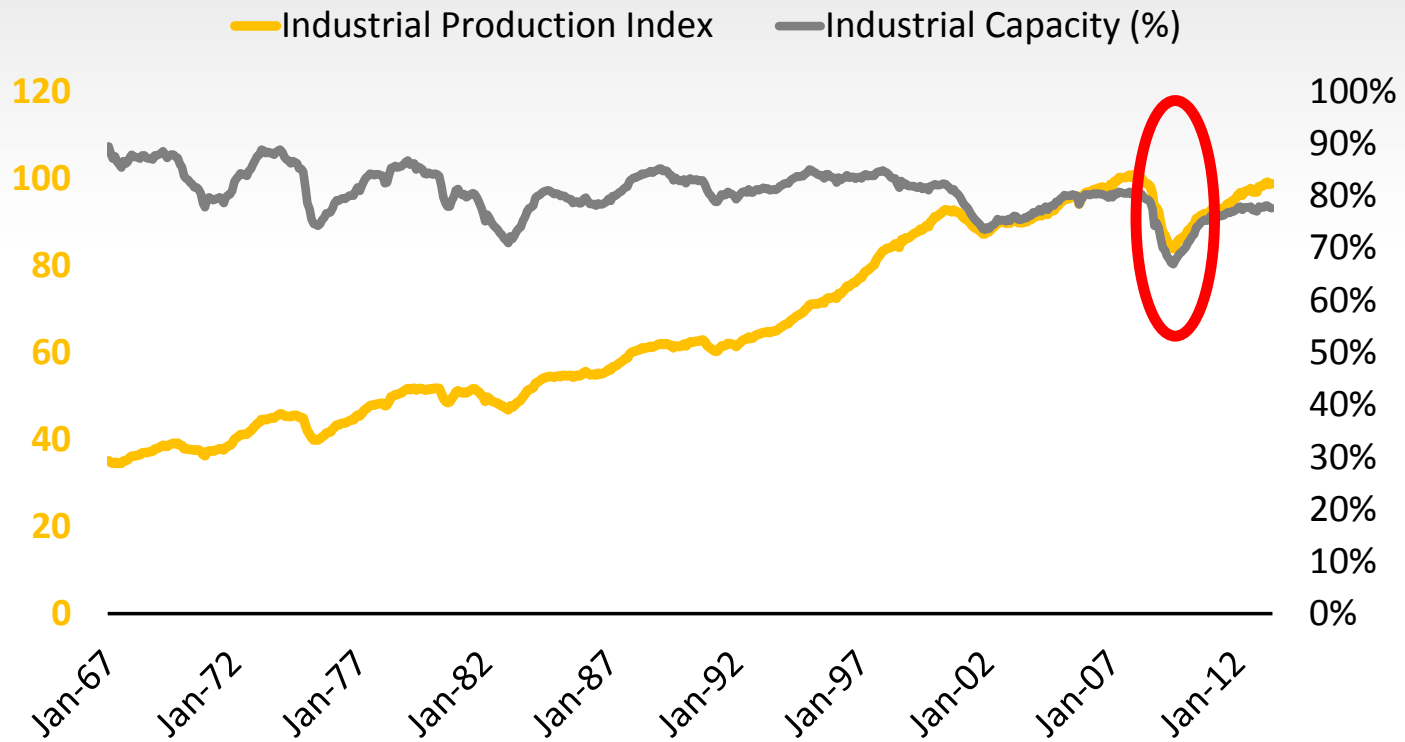
THE "NEW NEVADA"
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Industrial Capacity and Productivity



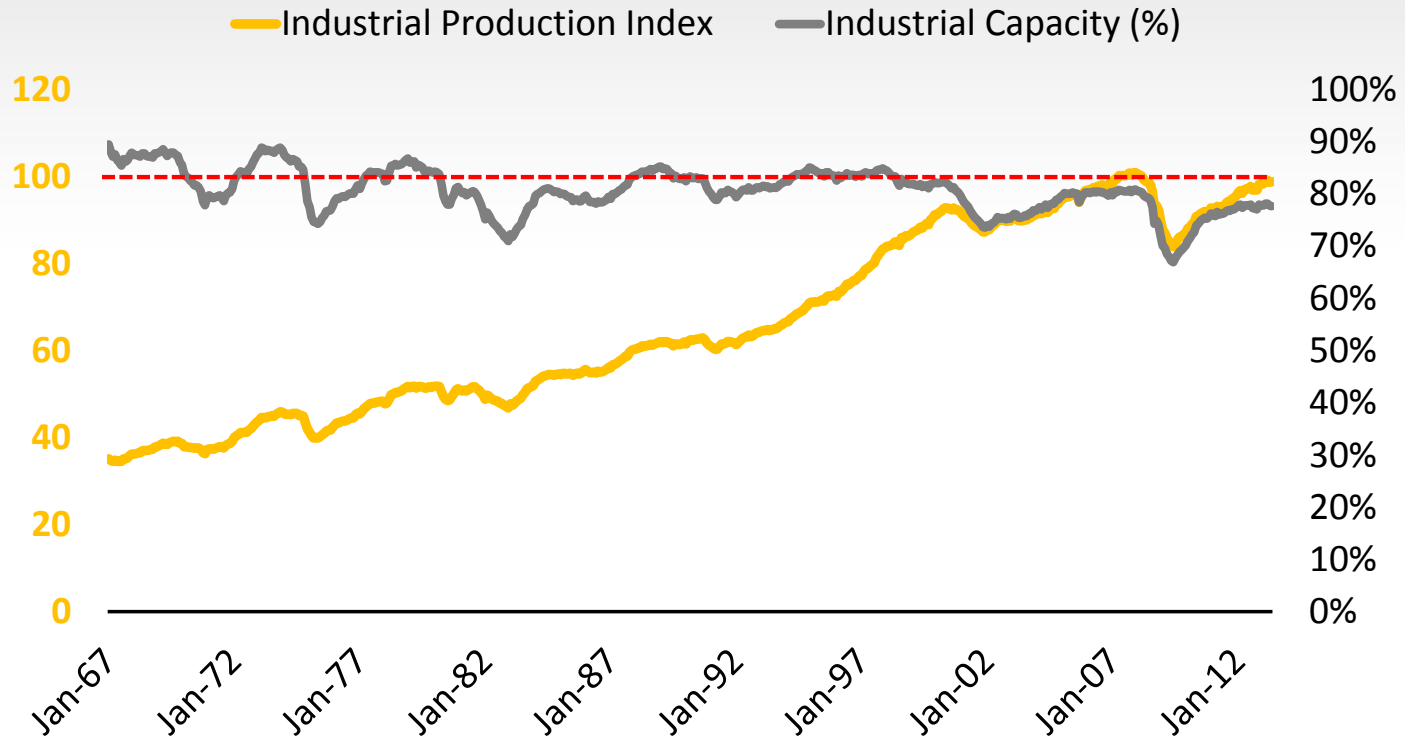
THE "NEW NEVADA"
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Industrial Capacity and Productivity



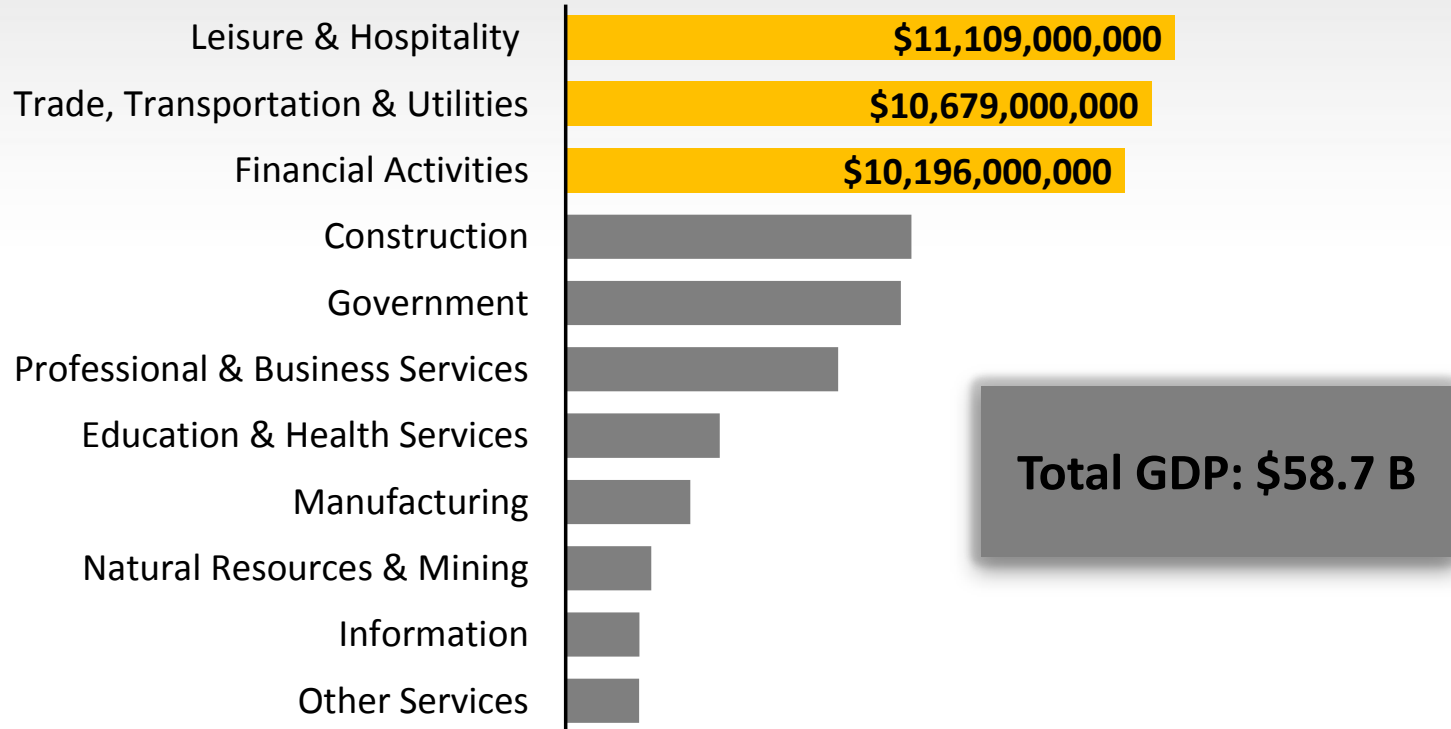
THE "NEW NEVADA"
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NV Gross Domestic Product: 1997

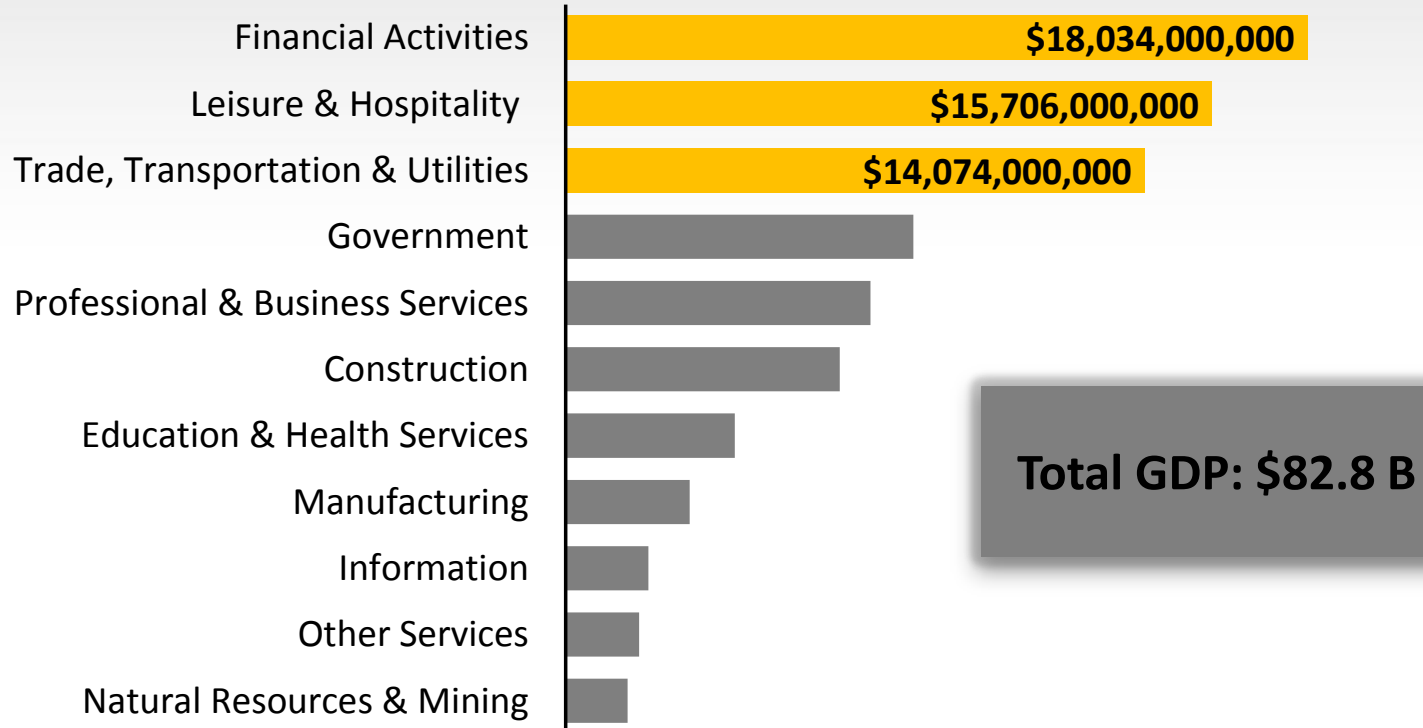


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NV Gross Domestic Product: 2002



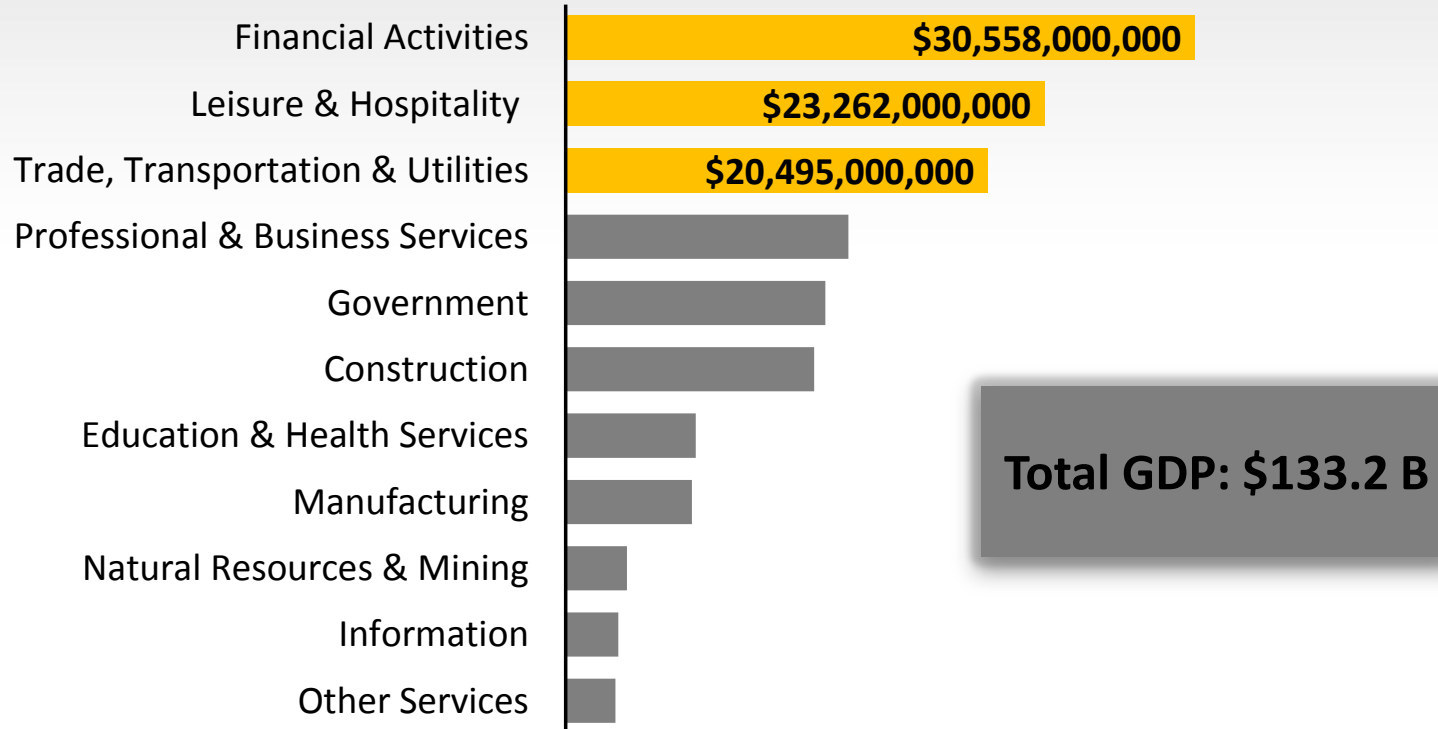
THE "NEW NEVADA"
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NV Gross Domestic Product: 2007

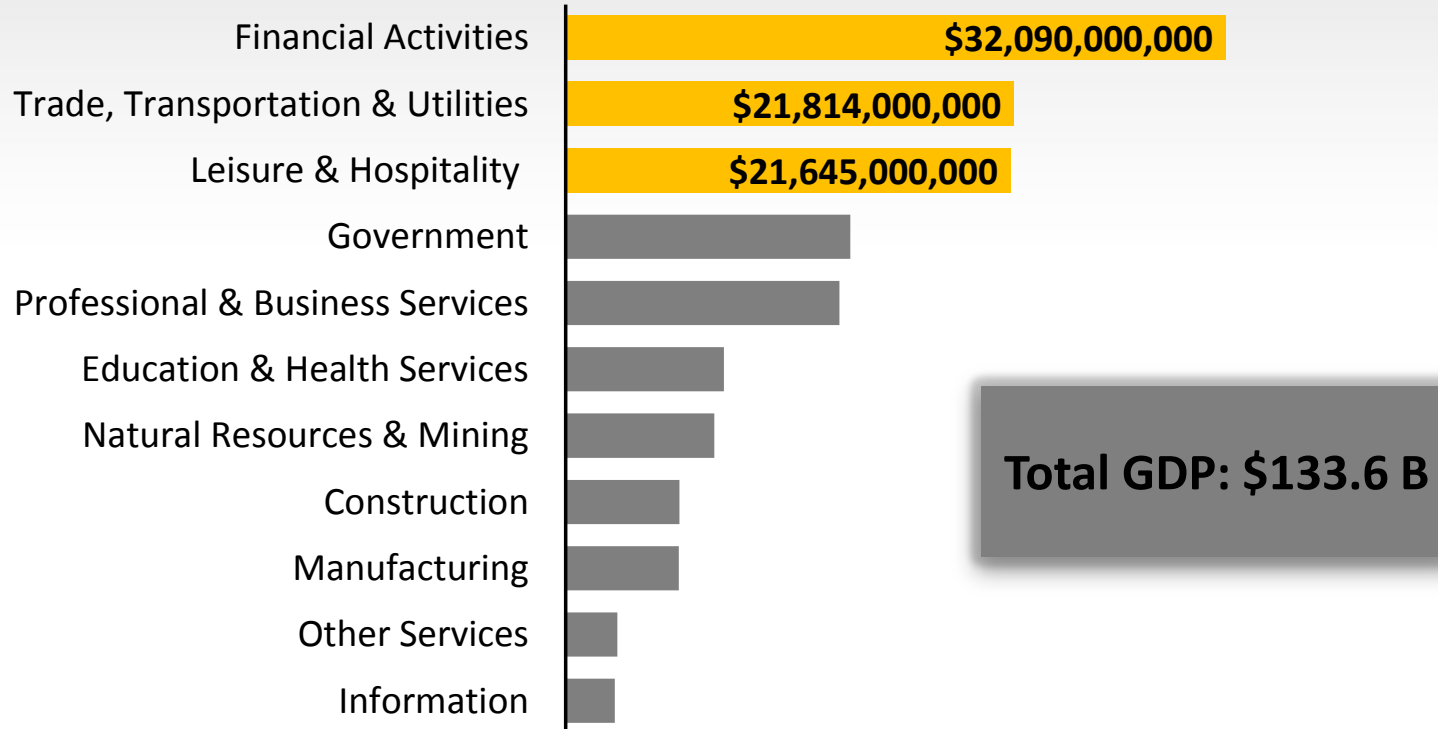


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NV Gross Domestic Product: 2012

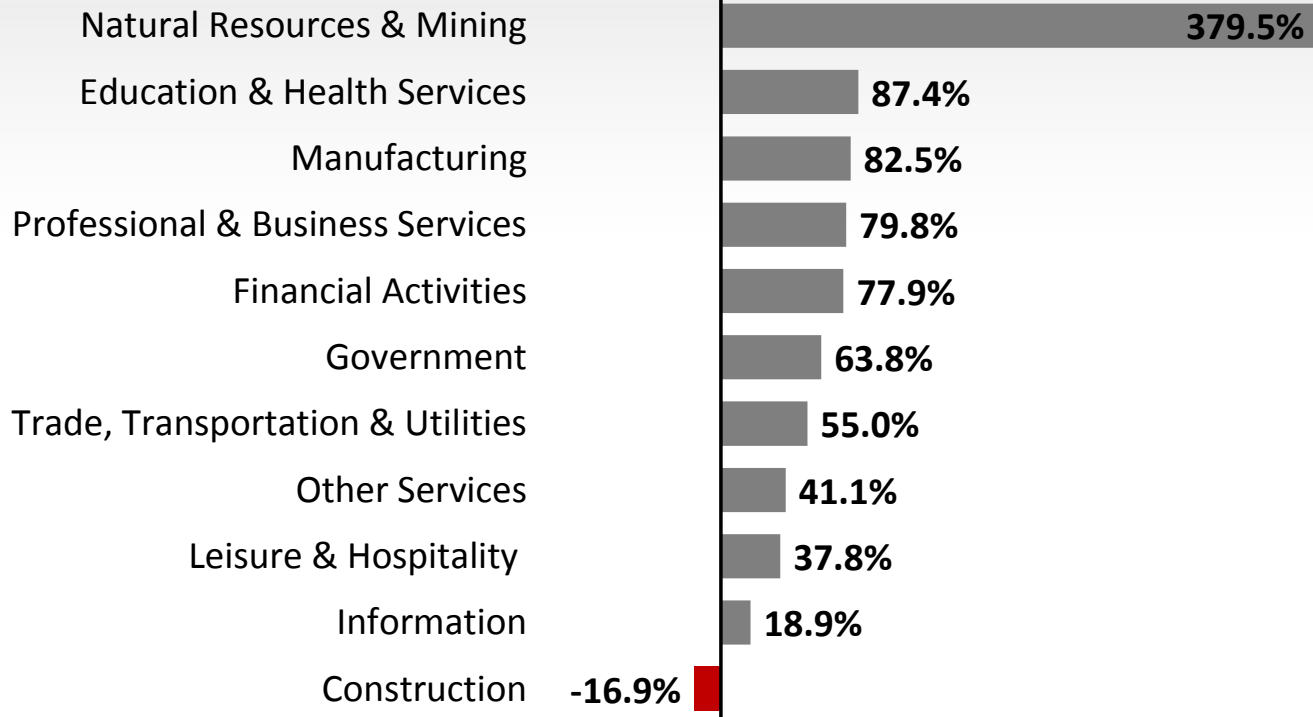


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NV Gross Domestic Product 10-Year Growth

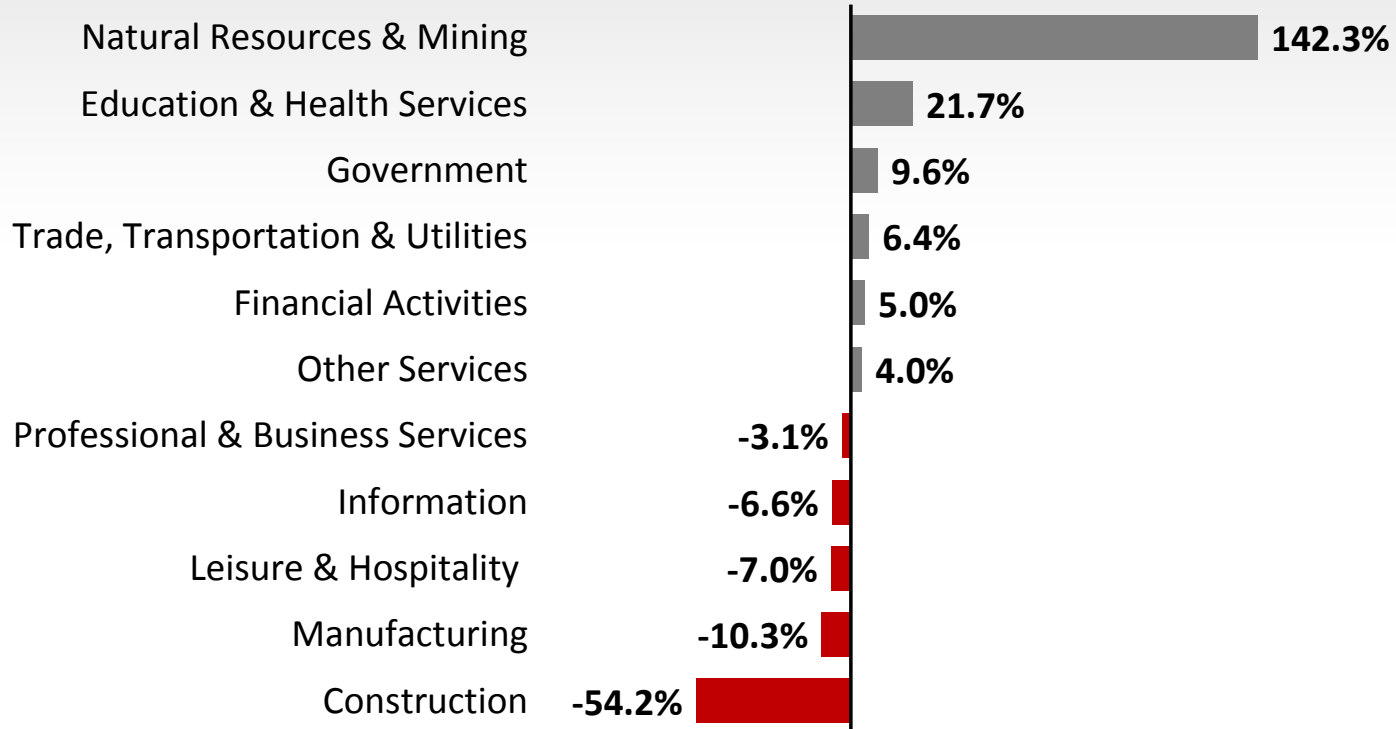


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NV Gross Domestic Product 5-Year Growth

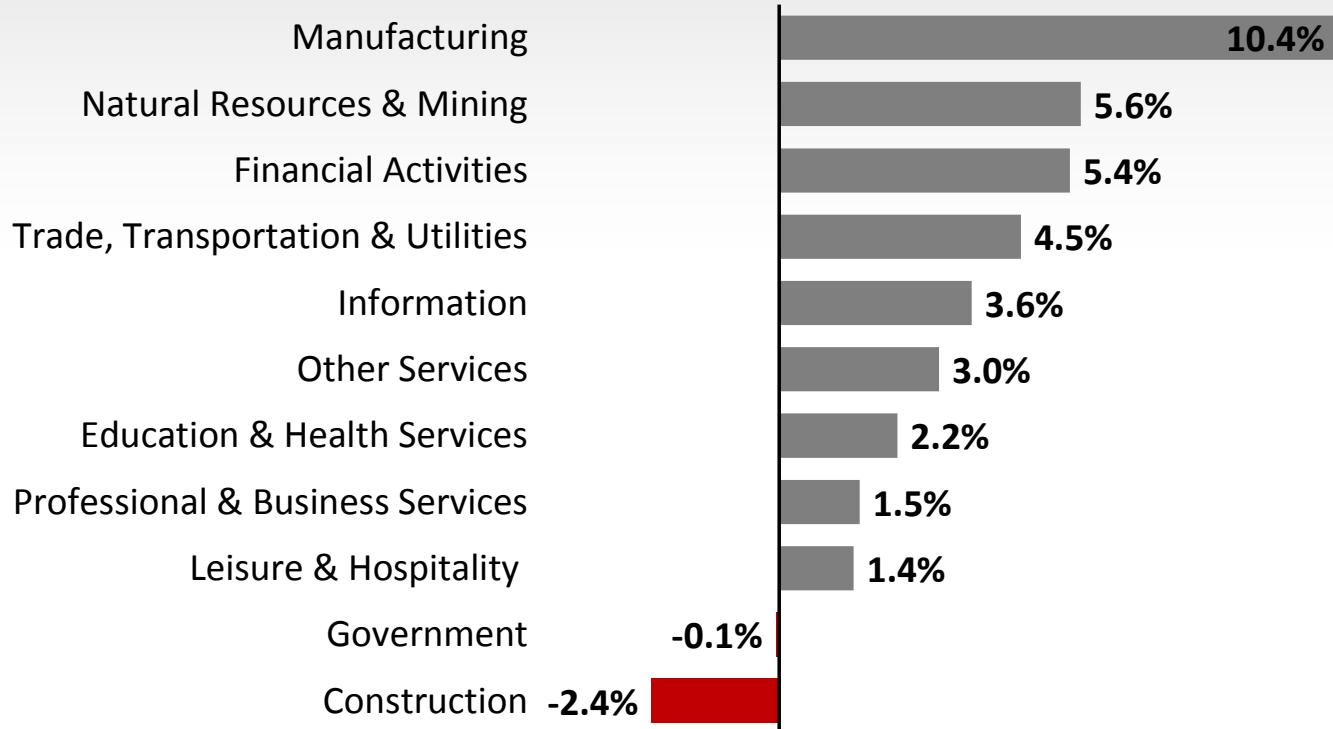


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NV Gross Domestic Product 1-Year Growth

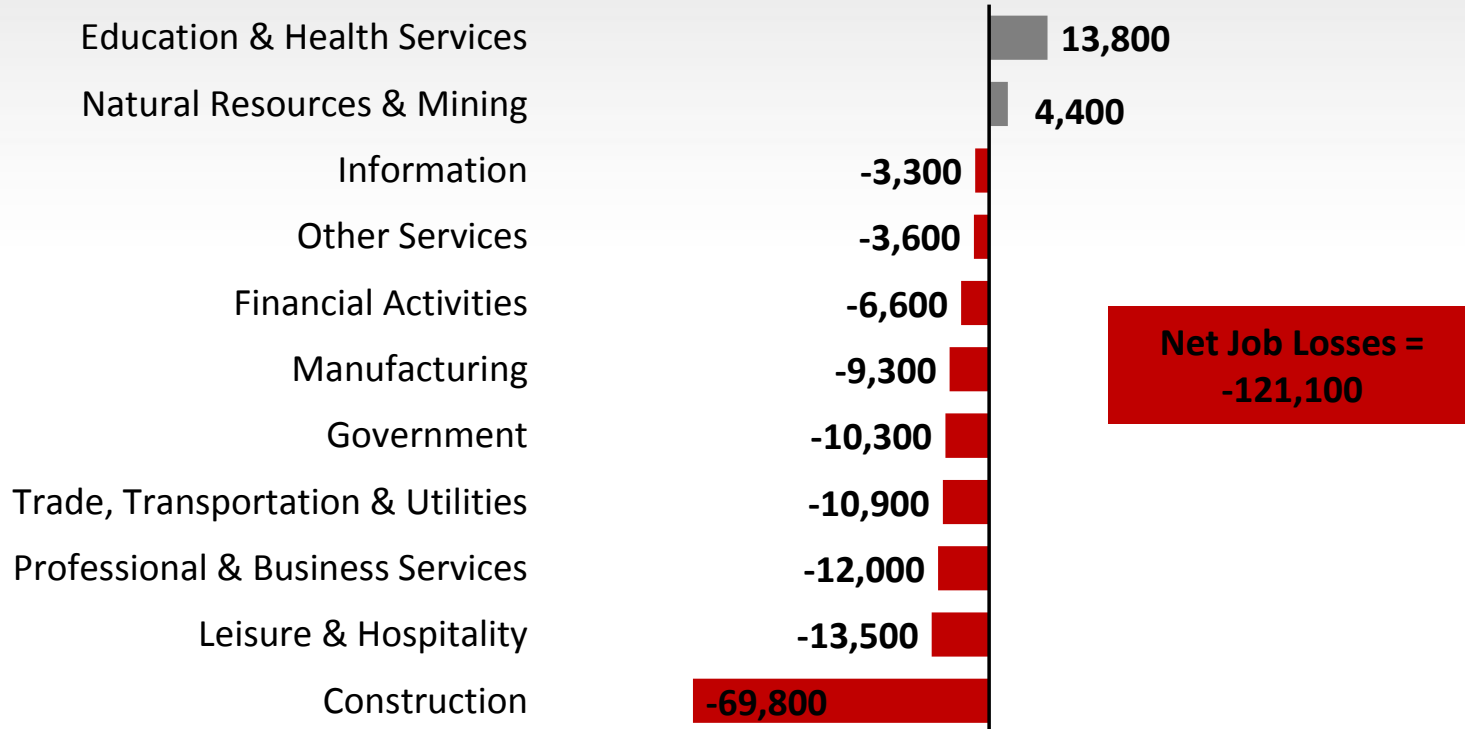


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Nevada Employment Growth Past 5 Years

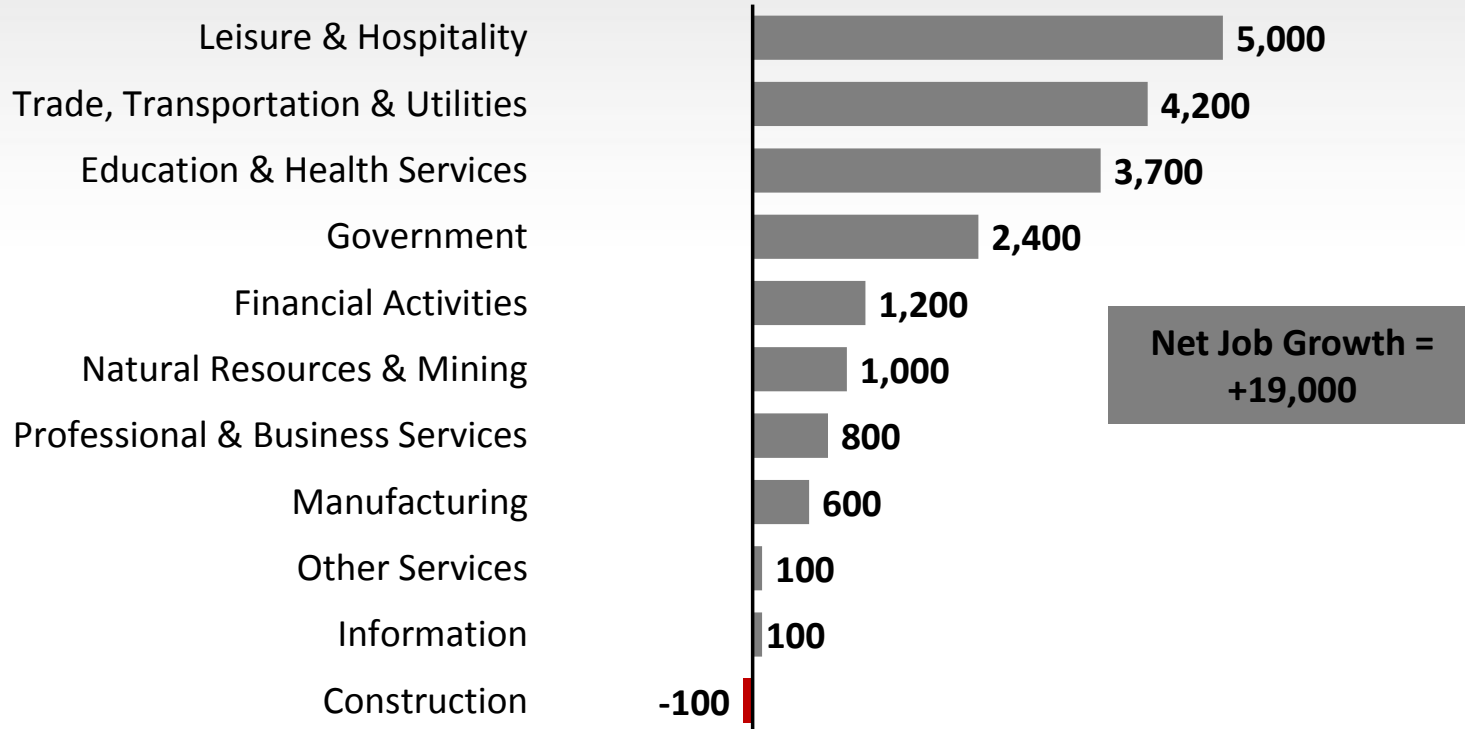


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Nevada Employment Growth Past 12 Months

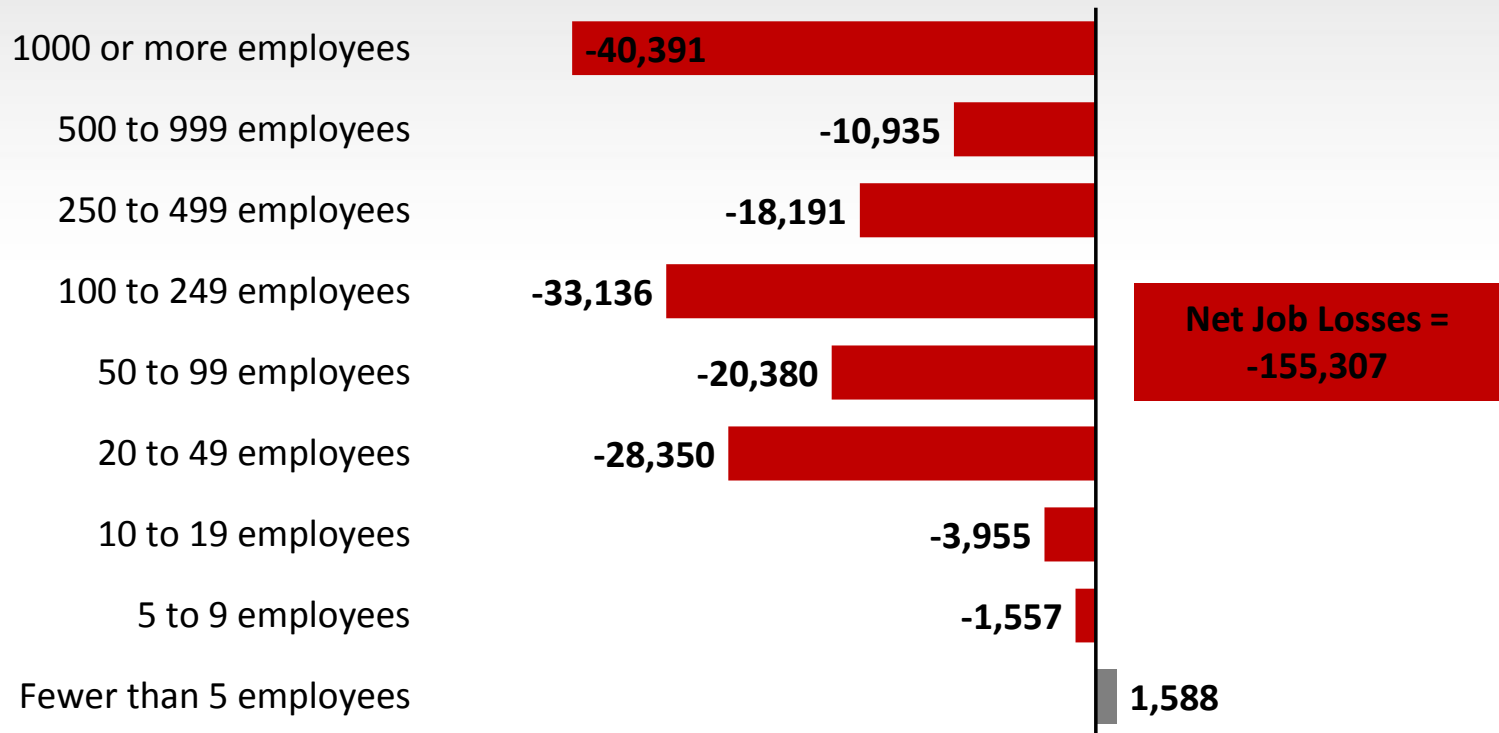


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Nevada Employment Growth Past 5 Years



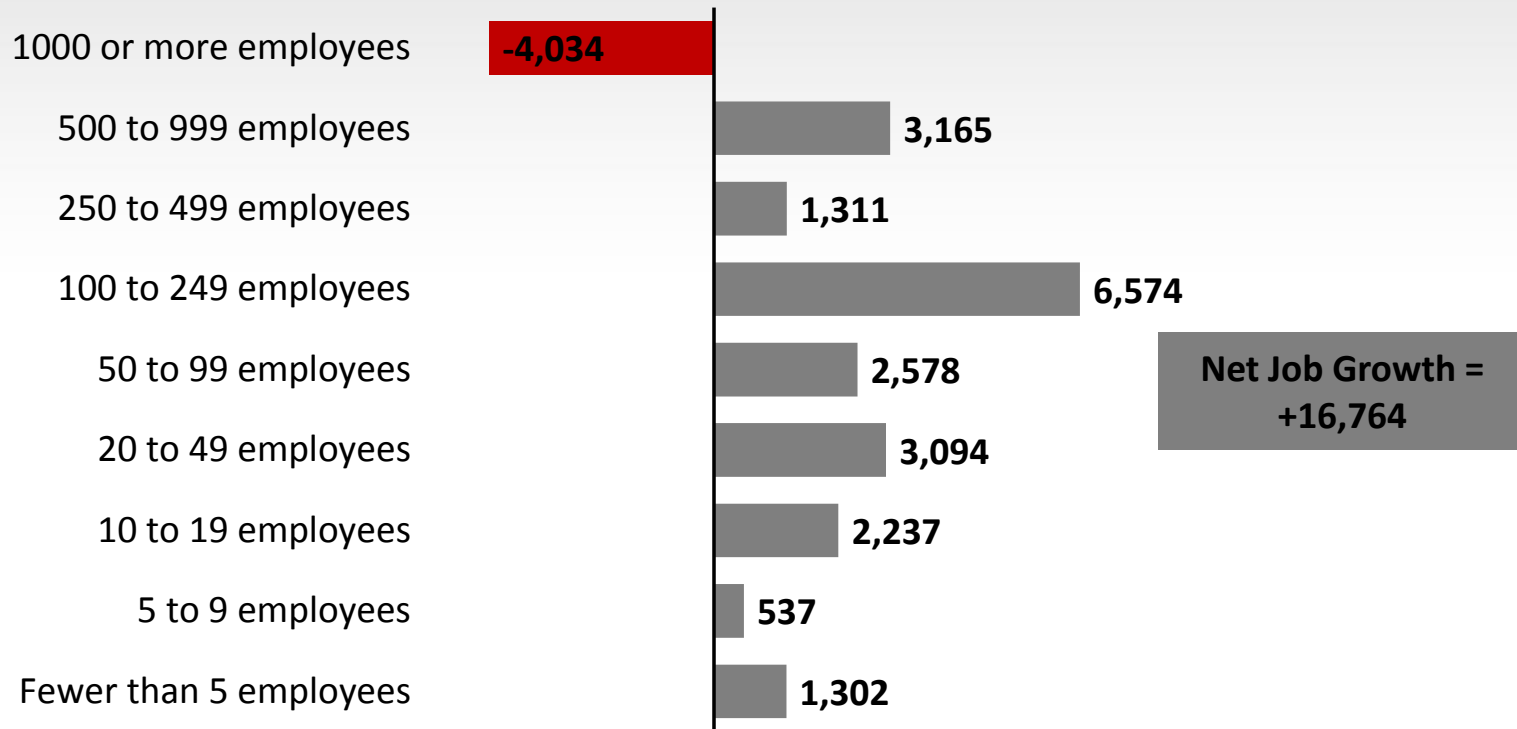
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Nevada Employment Growth Past 12 Months



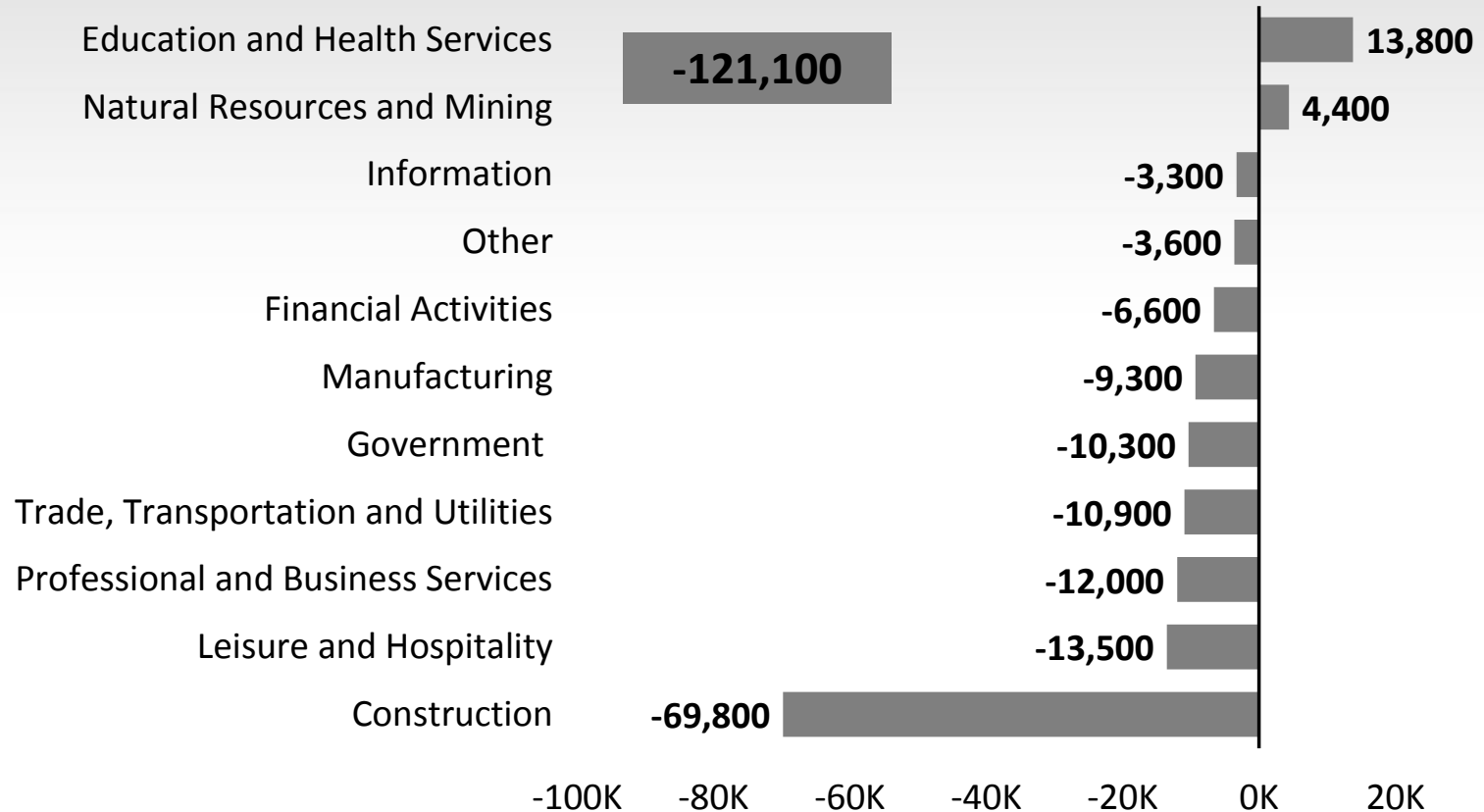
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General Overview of Nevada's Economy

APPLIED ANALYSIS

Nevada Shift-Share Analysis

Net Growth | Past 5 Years



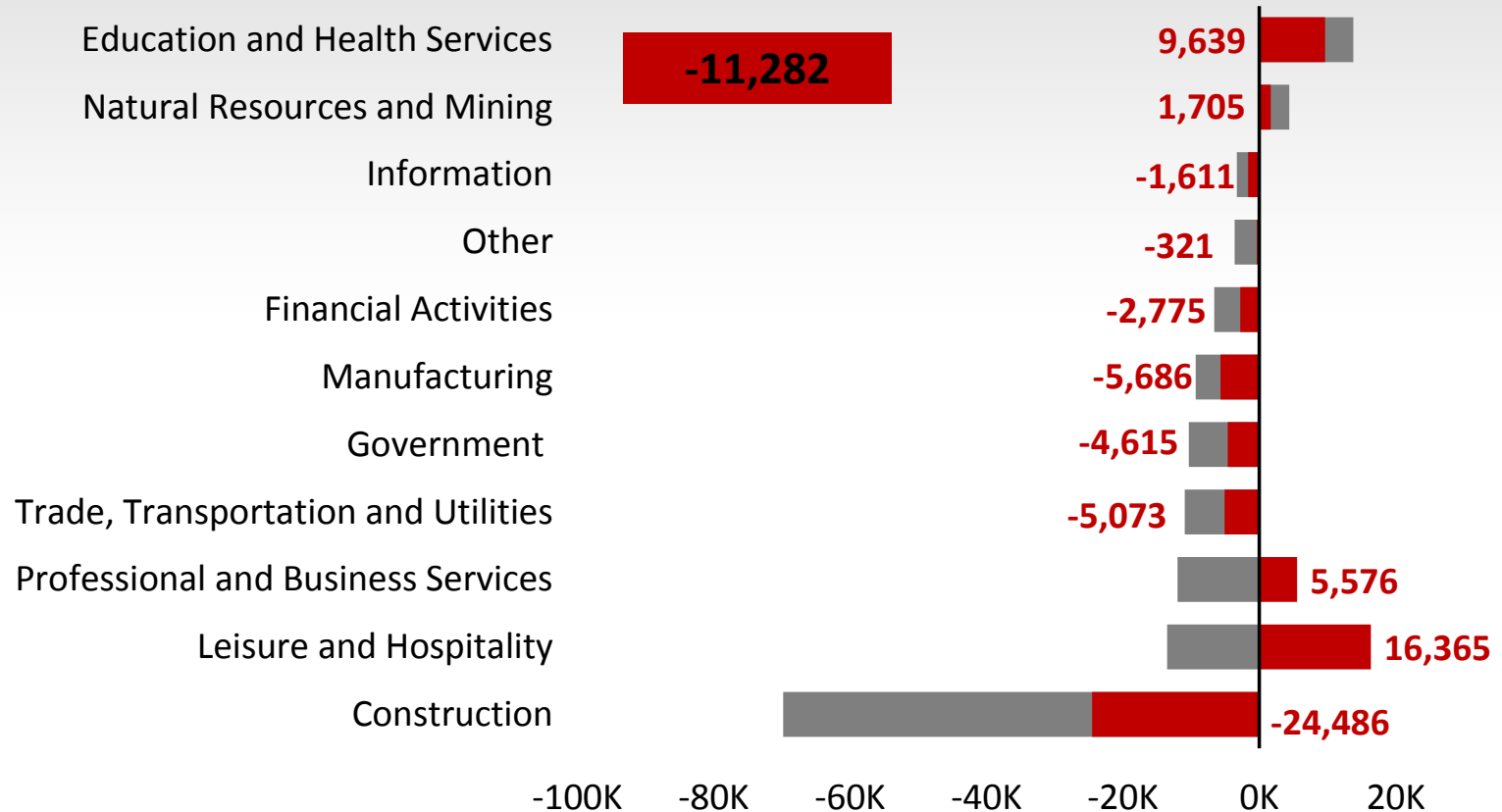
THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy



Nevada Shift-Share Analysis

Standardized Net Growth | Past 5 Years



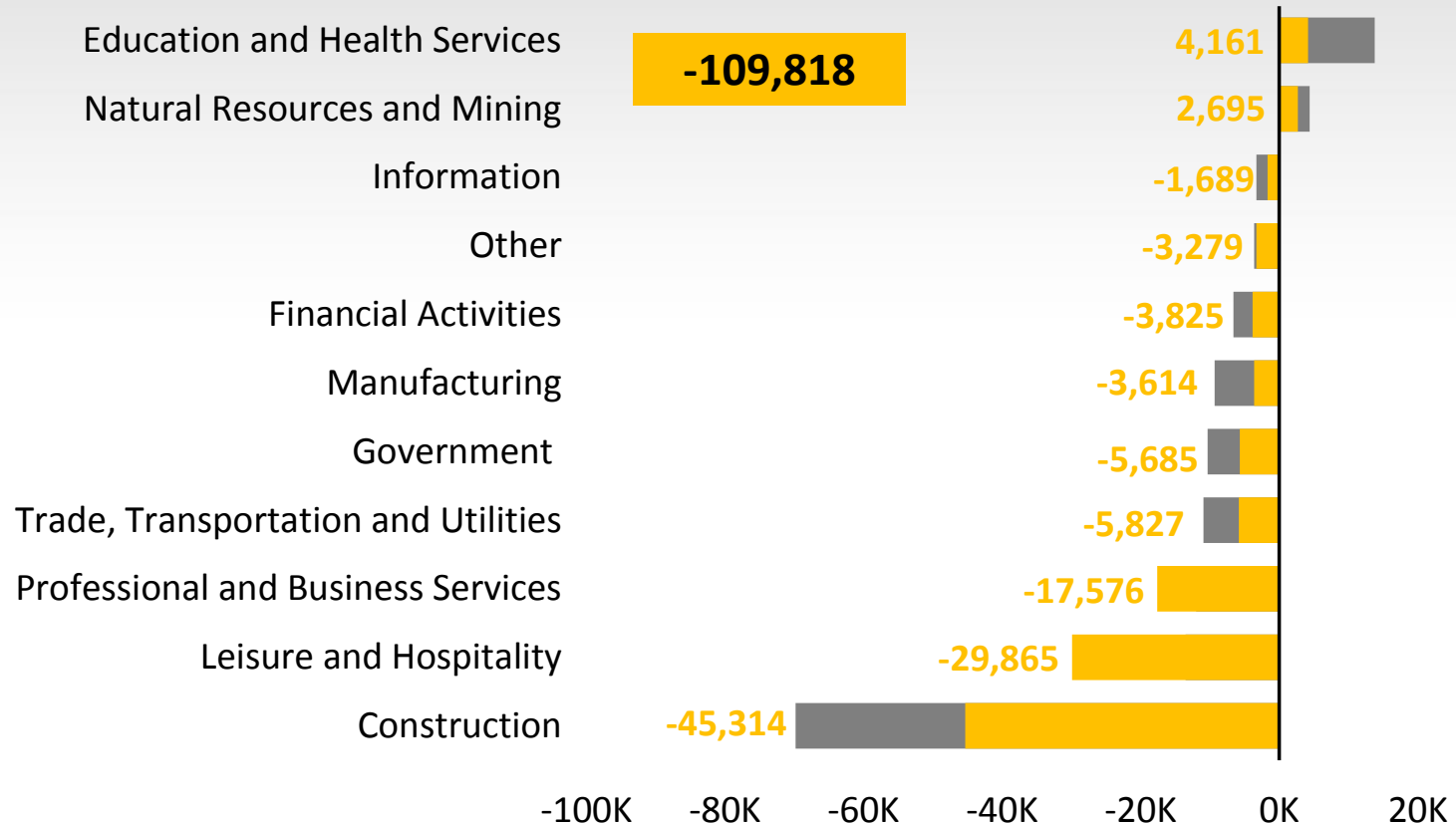
THE "NEW NEVADA"
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General Overview of Nevada's Economy

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Nevada Shift-Share Analysis

Regional Shift Net Change | Past 5 Years



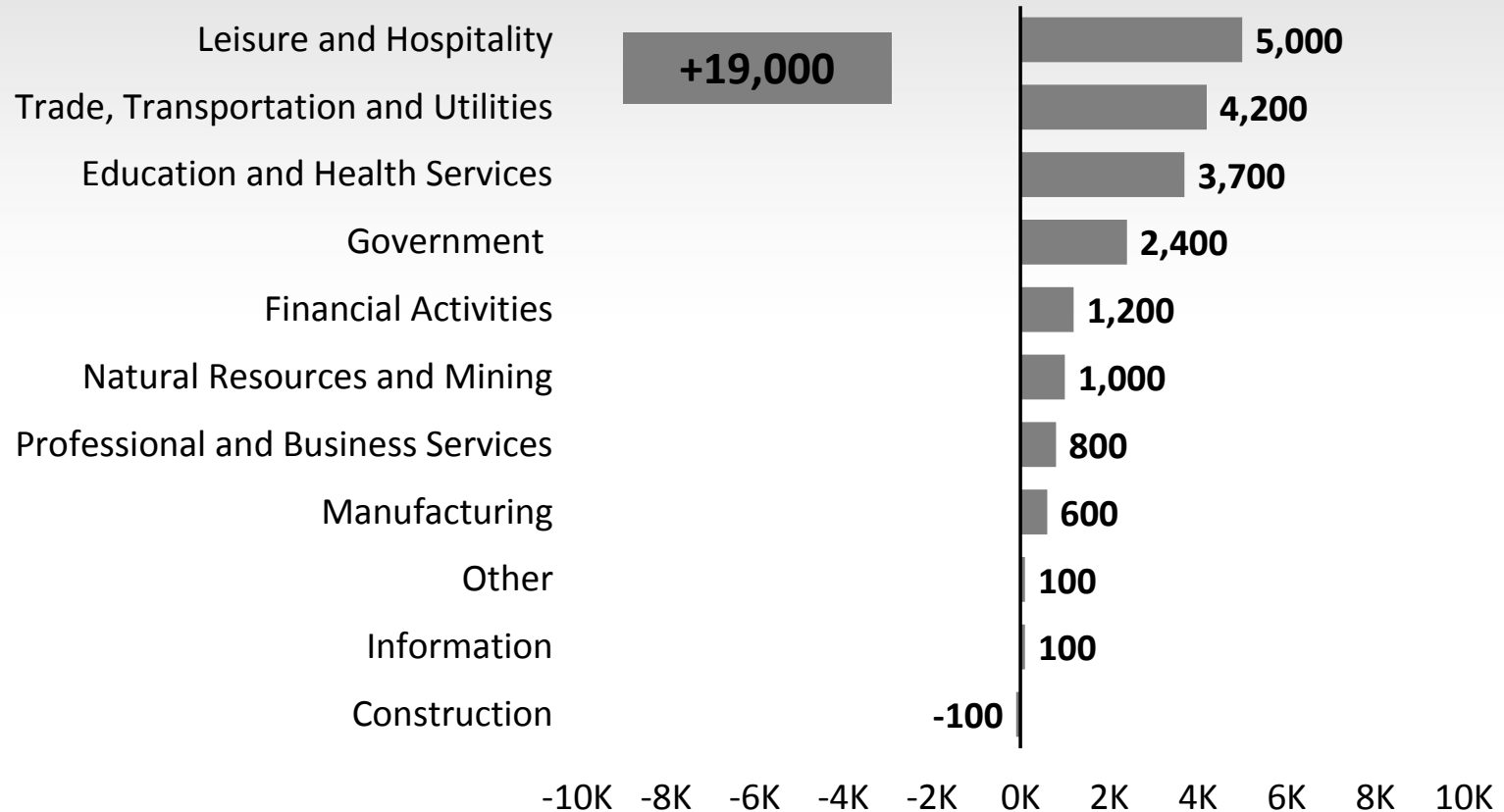
THE "NEW NEVADA"
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Nevada Shift-Share Analysis

Net Growth | Past 12 Months



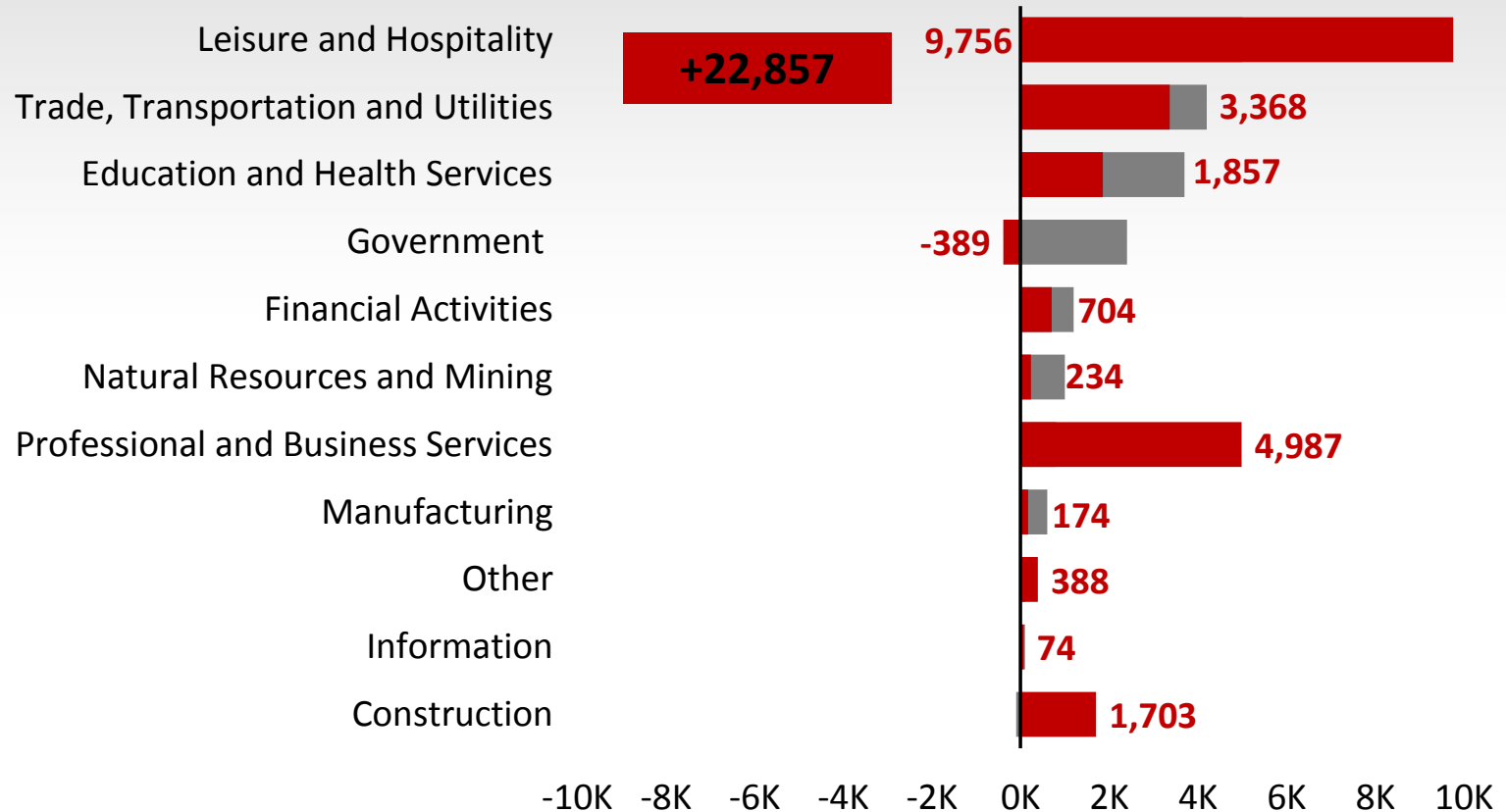
THE "NEW NEVADA"
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Nevada Shift-Share Analysis

Standardized Net Growth | Past 12 Months



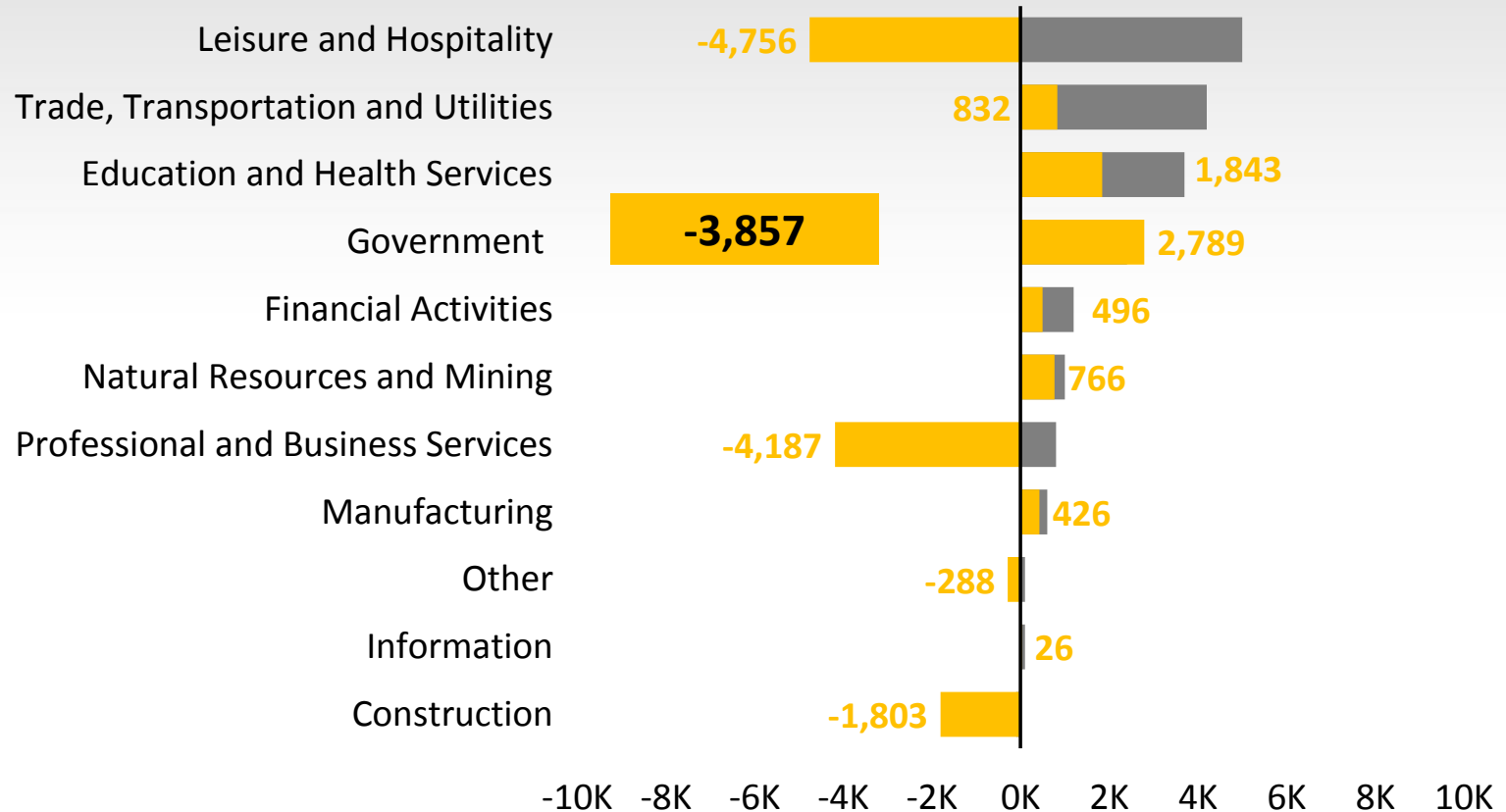
THE "NEW NEVADA"
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Nevada Shift-Share Analysis

Regional Shift Net Change | Past 12 Months

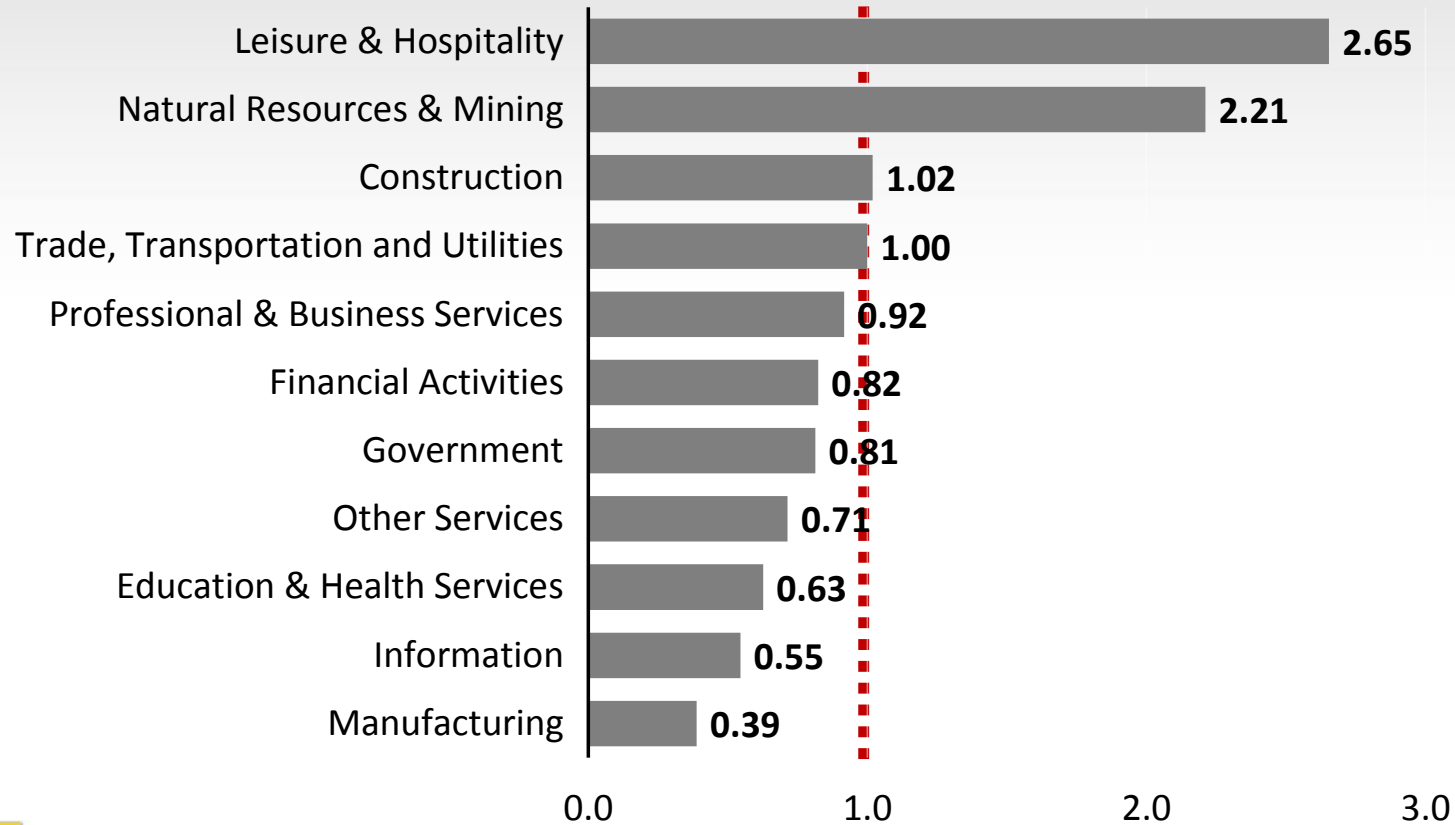


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Nevada Location Quotients By Major Industry

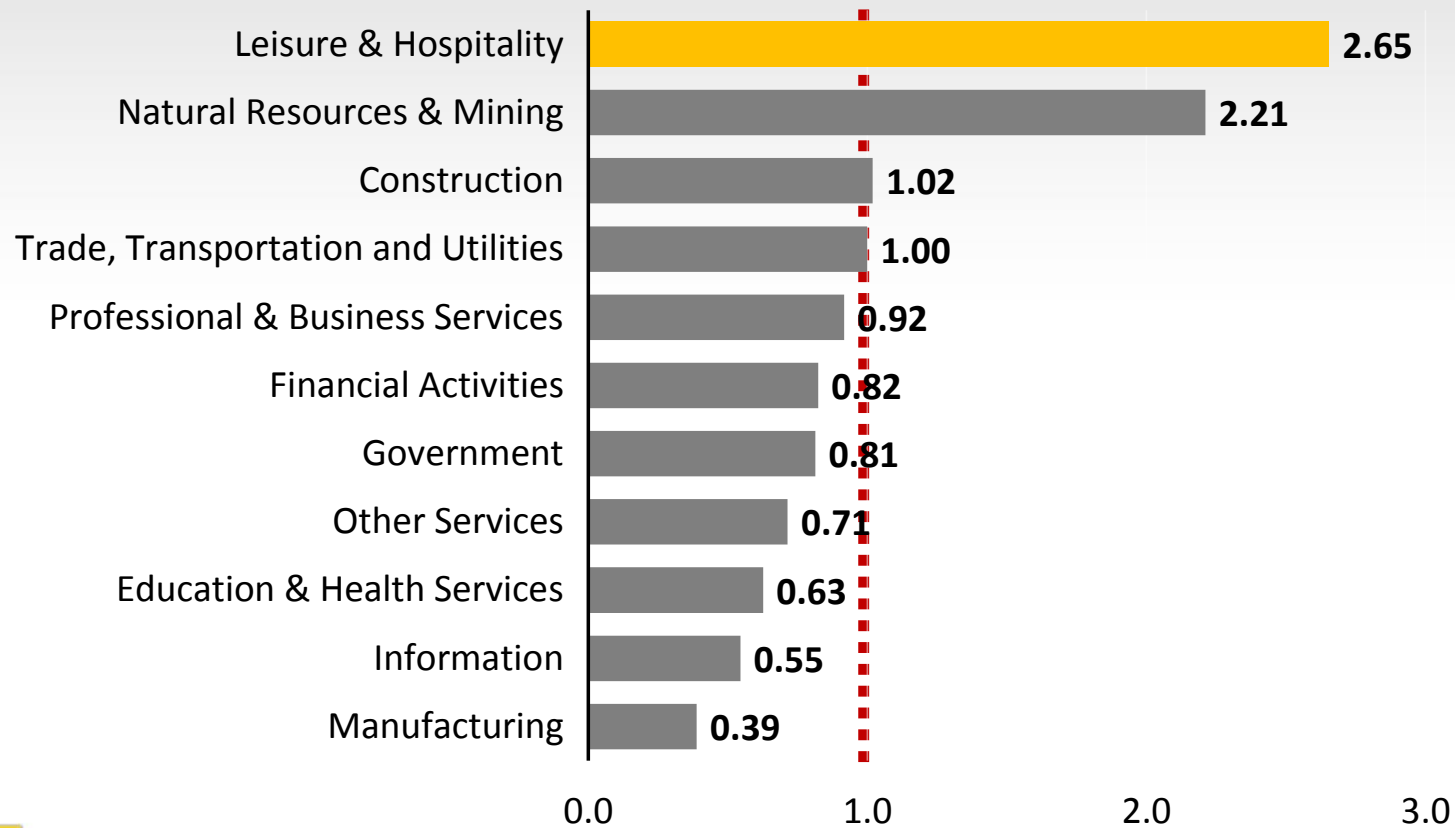


THE "NEW NEVADA"
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APPLIED ANALYSIS

Nevada Location Quotients By Major Industry

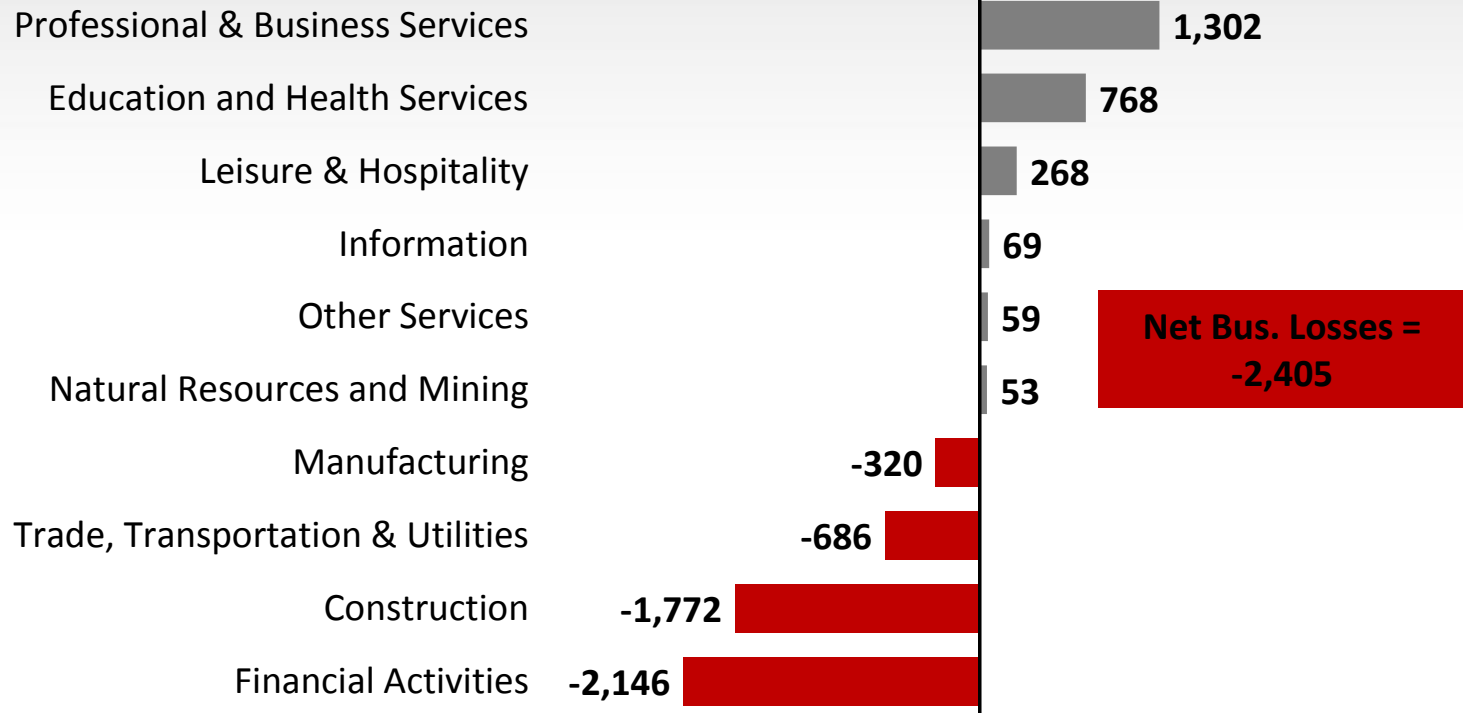


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APPLIED ANALYSIS

Nevada Business Growth Past 5 Years

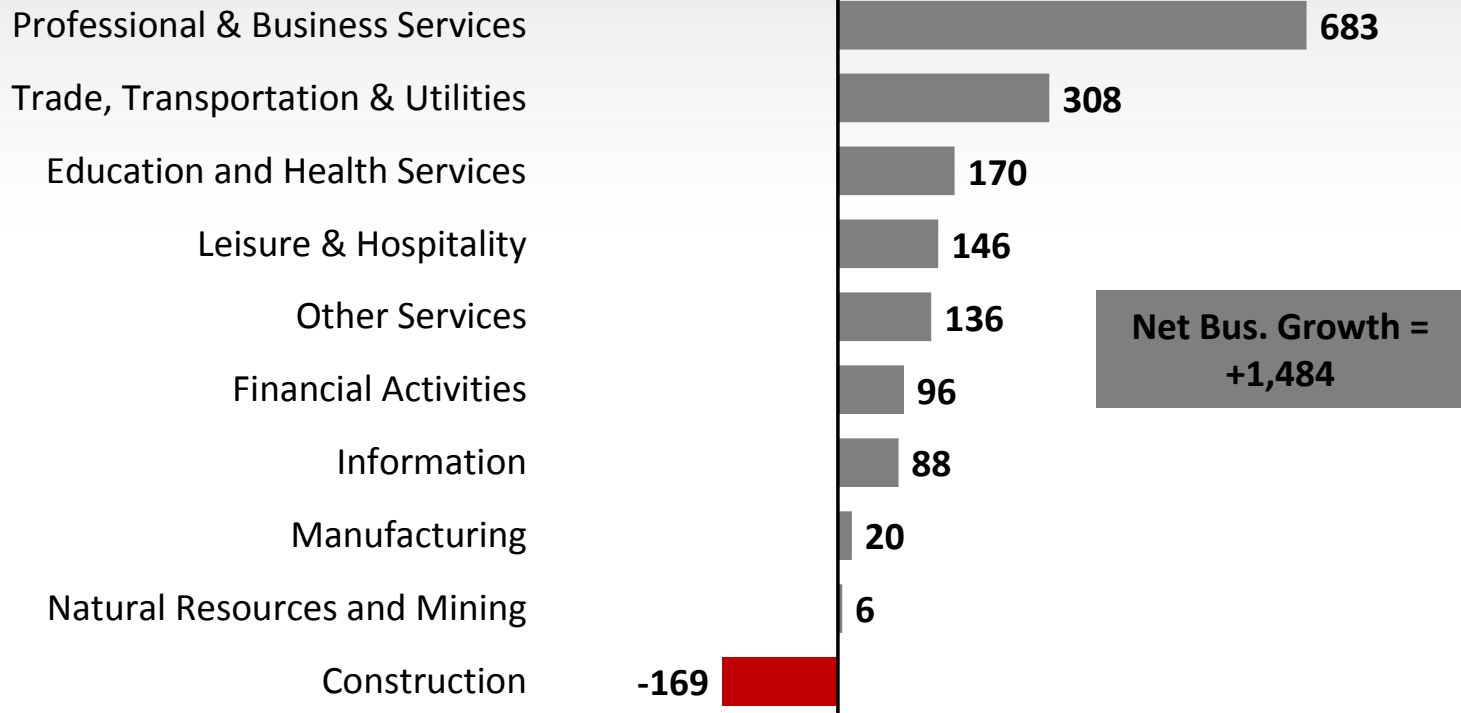


THE "NEW NEVADA"
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Nevada Business Growth Past 12 Months



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

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Nevada Business Growth Past 5 Years

1000 or more employees

-20

500 to 999 employees

-17

250 to 499 employees

-45

100 to 249 employees

-200

50 to 99 employees

-287

20 to 49 employees

-892

10 to 19 employees

-297

5 to 9 employees

-195

Fewer than 5 employees

-30

**Net Bus. Losses =
-1,983**



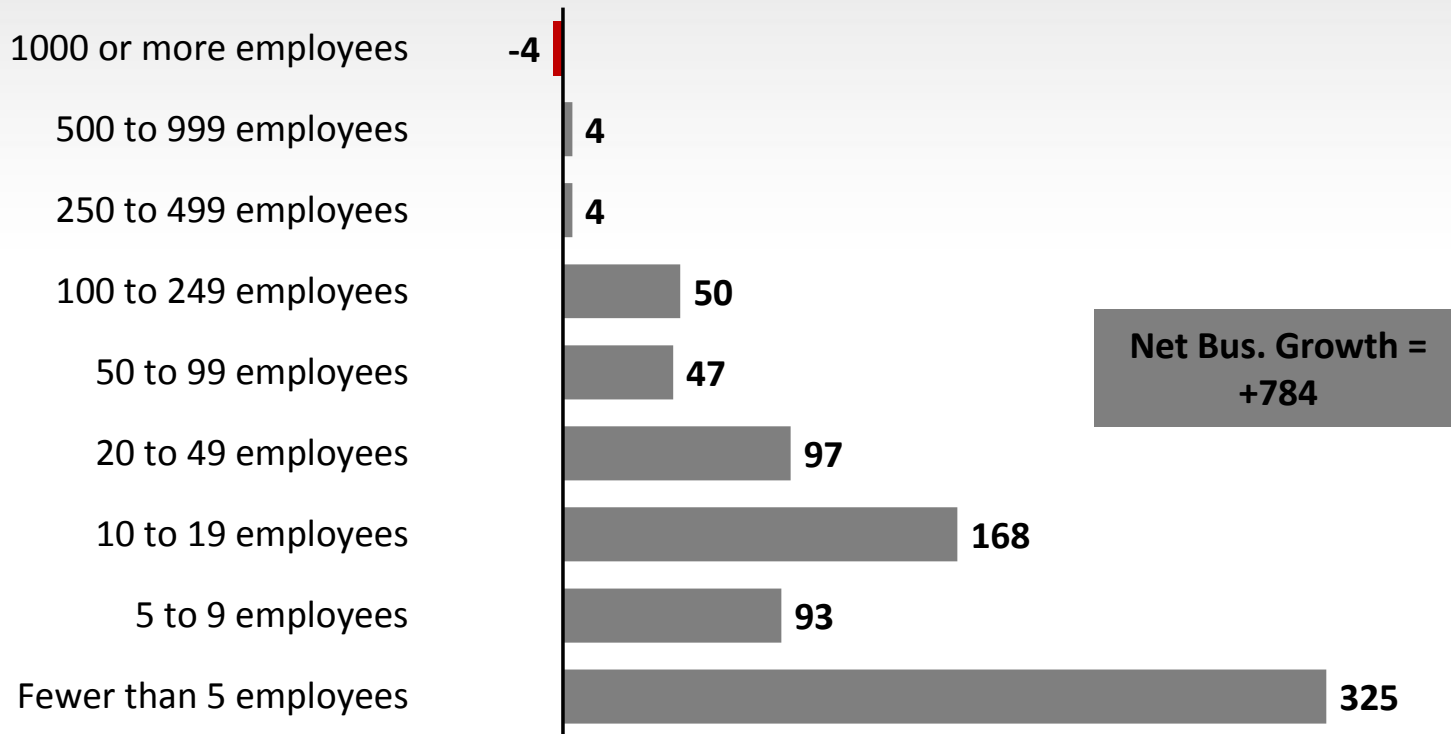
THE "NEW NEVADA"
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Nevada Business Growth Past 12 Months



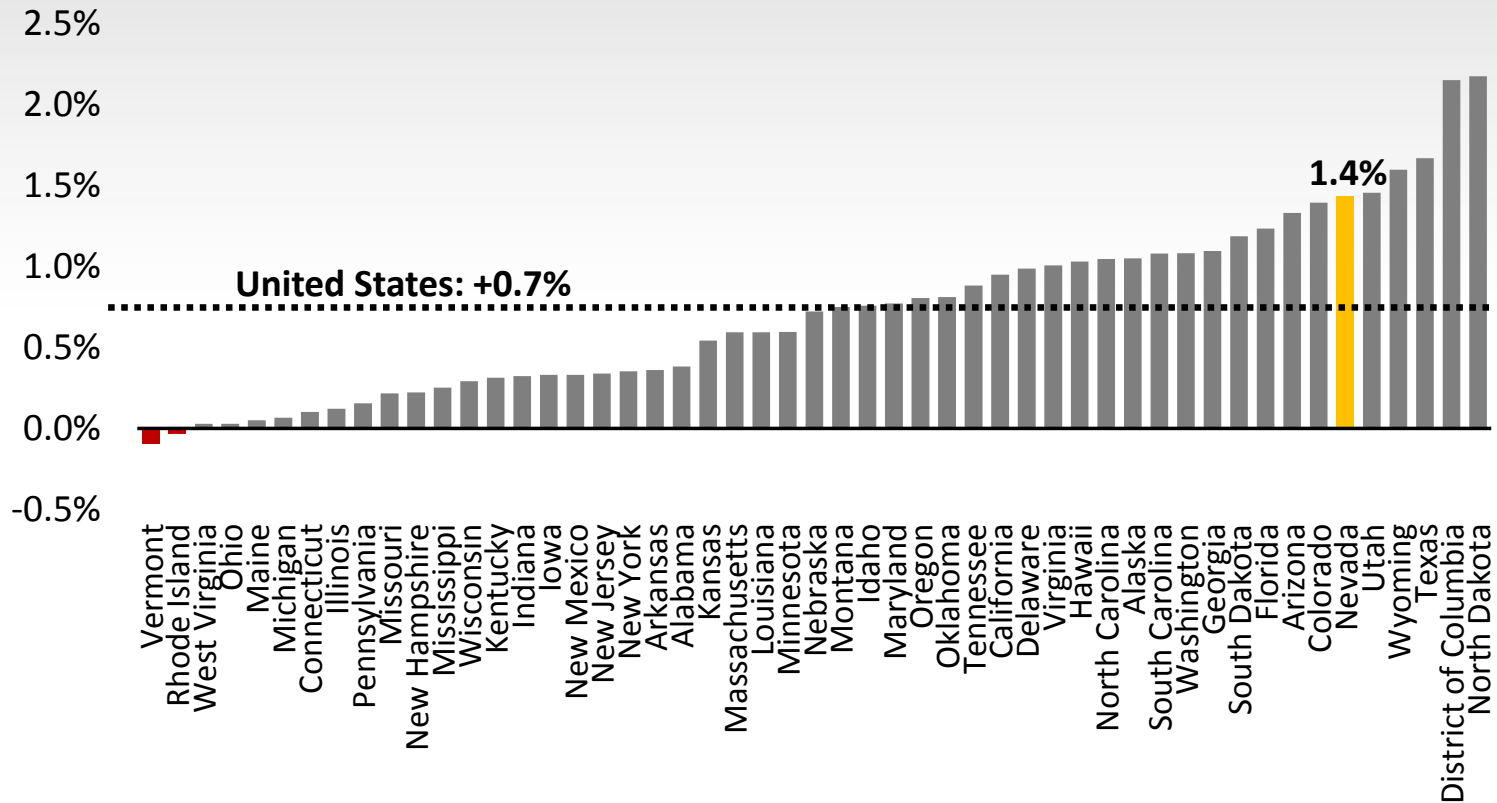
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General Overview of Nevada's Economy

APPLIED ANALYSIS



Population Growth by State

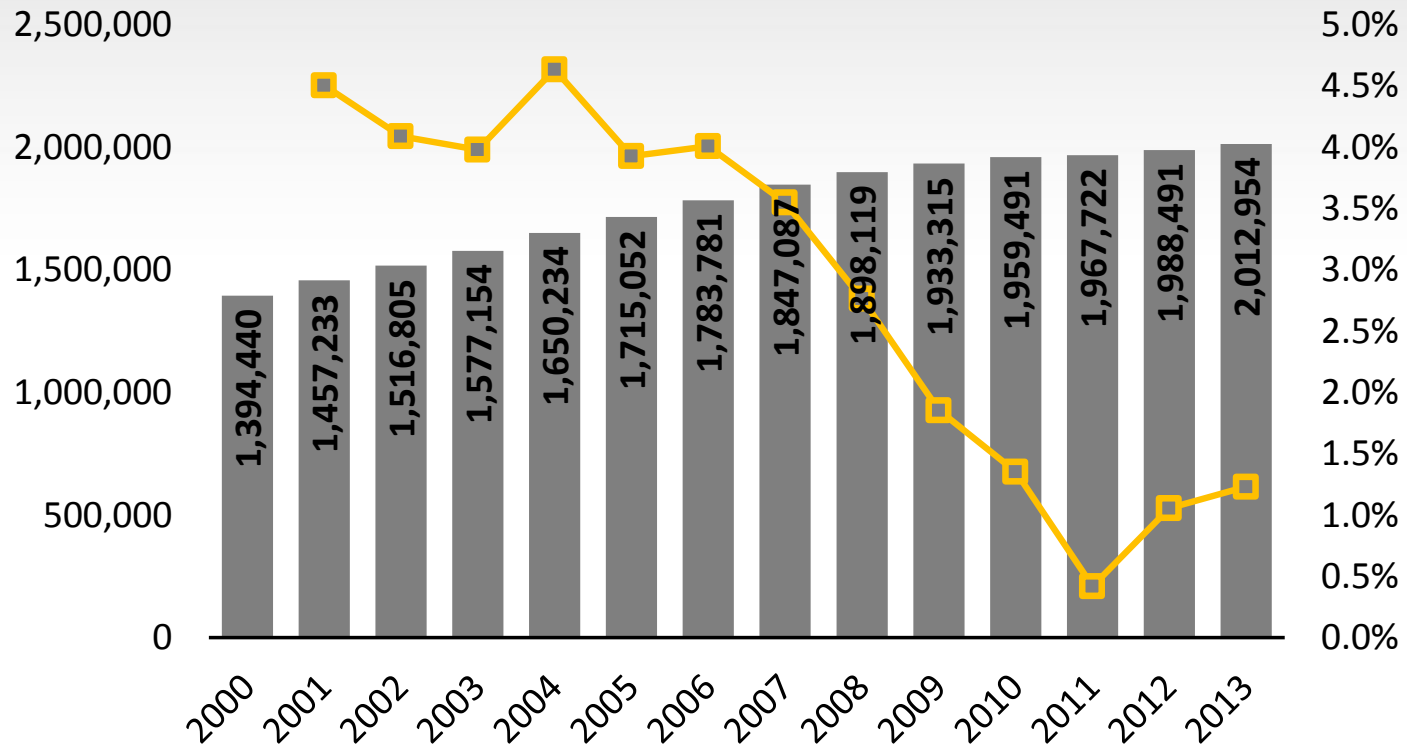


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IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy

APPLIED ANALYSIS

Clark County Population



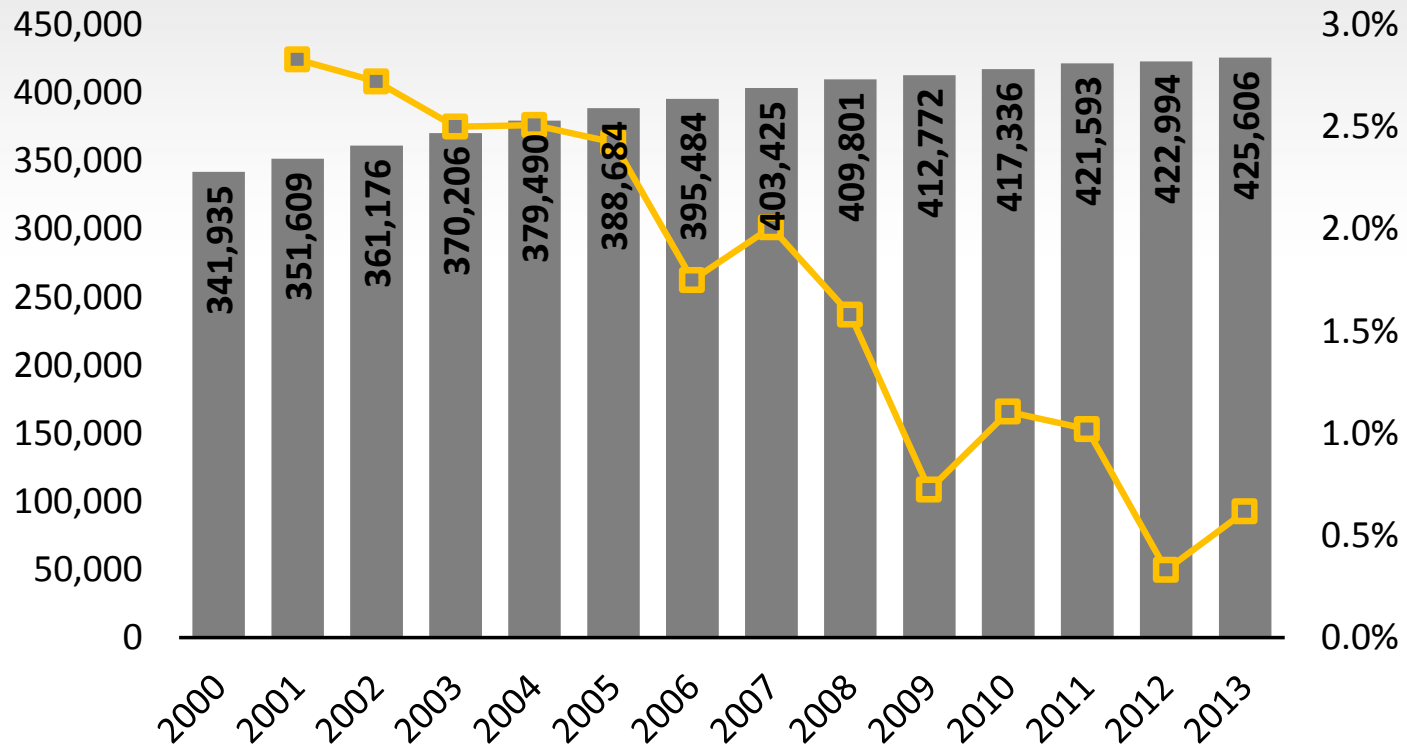
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Washoe County Population

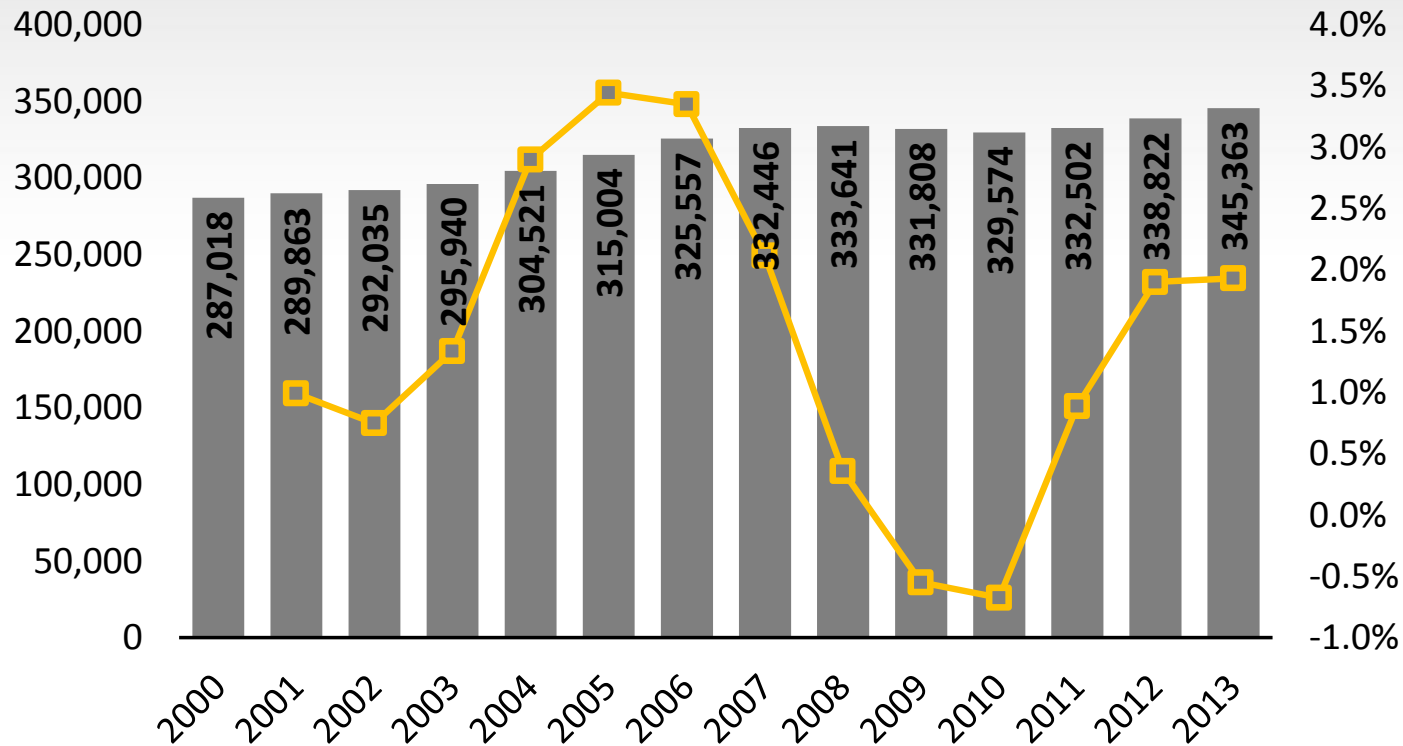


THE "NEW NEVADA"
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General Overview of Nevada's Economy

APPLIED ANALYSIS

Balance of State Population



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

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APPLIED ANALYSIS



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COMPETITIVE POSITIONING



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

APPLIED
ANALYSIS 

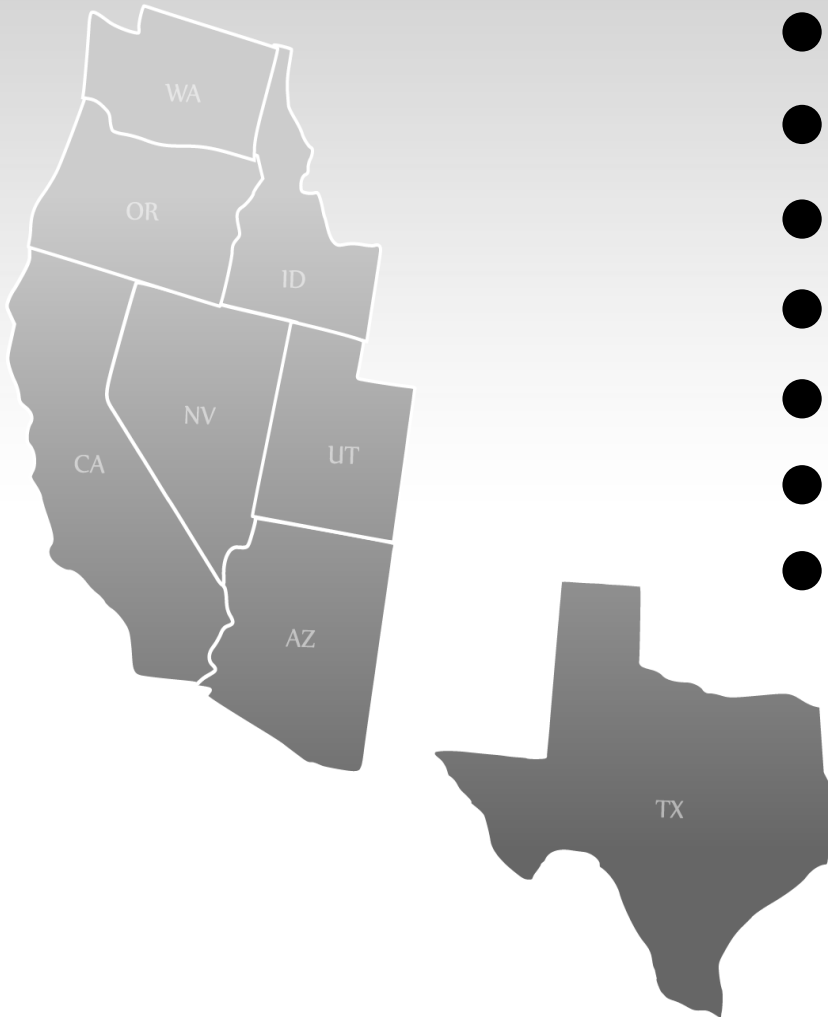
LABOR FORCE



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- California: 18,643,259
- Texas: 12,798,935
- Washington: 3,494,680
- Arizona: 3,012,915
- Oregon: 1,928,056
- Utah: 1,388,716
- Idaho: 771,857



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- California: 18,643,259
- Texas: 12,798,935
- Washington: 3,494,680
- Arizona: 3,012,915
- Oregon: 1,928,056
- Utah: 1,388,716
- **Nevada: 1,377,479**
- Idaho: 771,857



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS

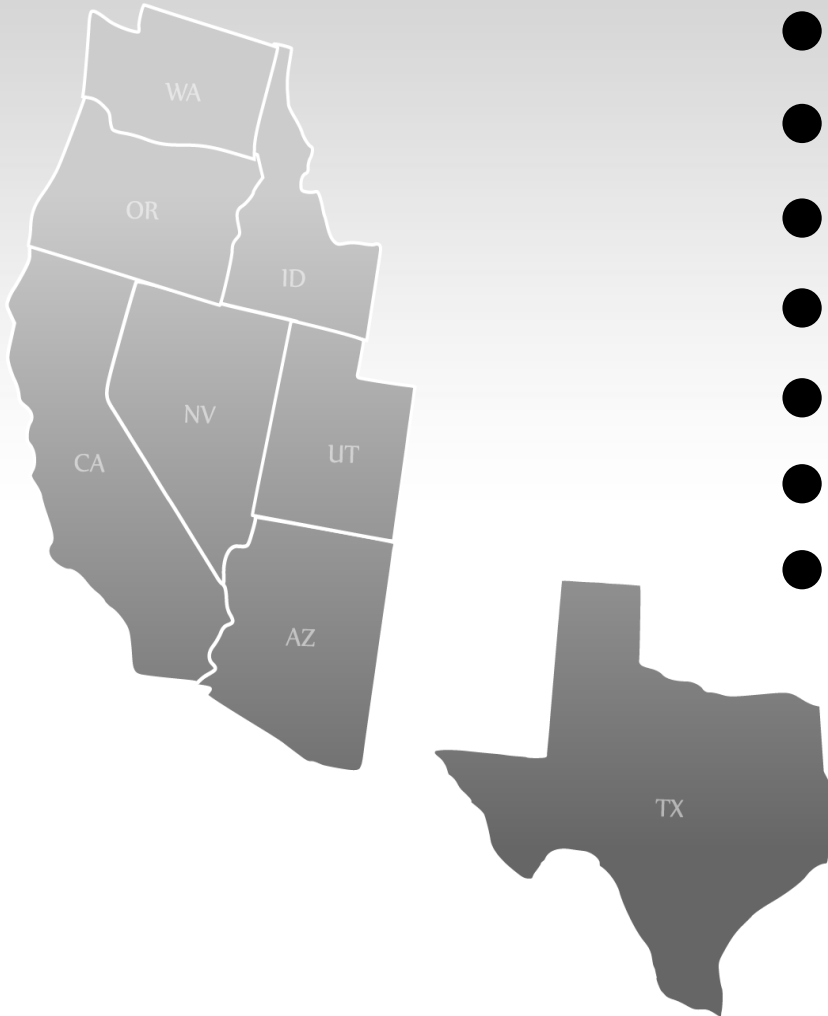
LABOR FORCE PARTICIPATION RATE



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED
ANALYSIS 



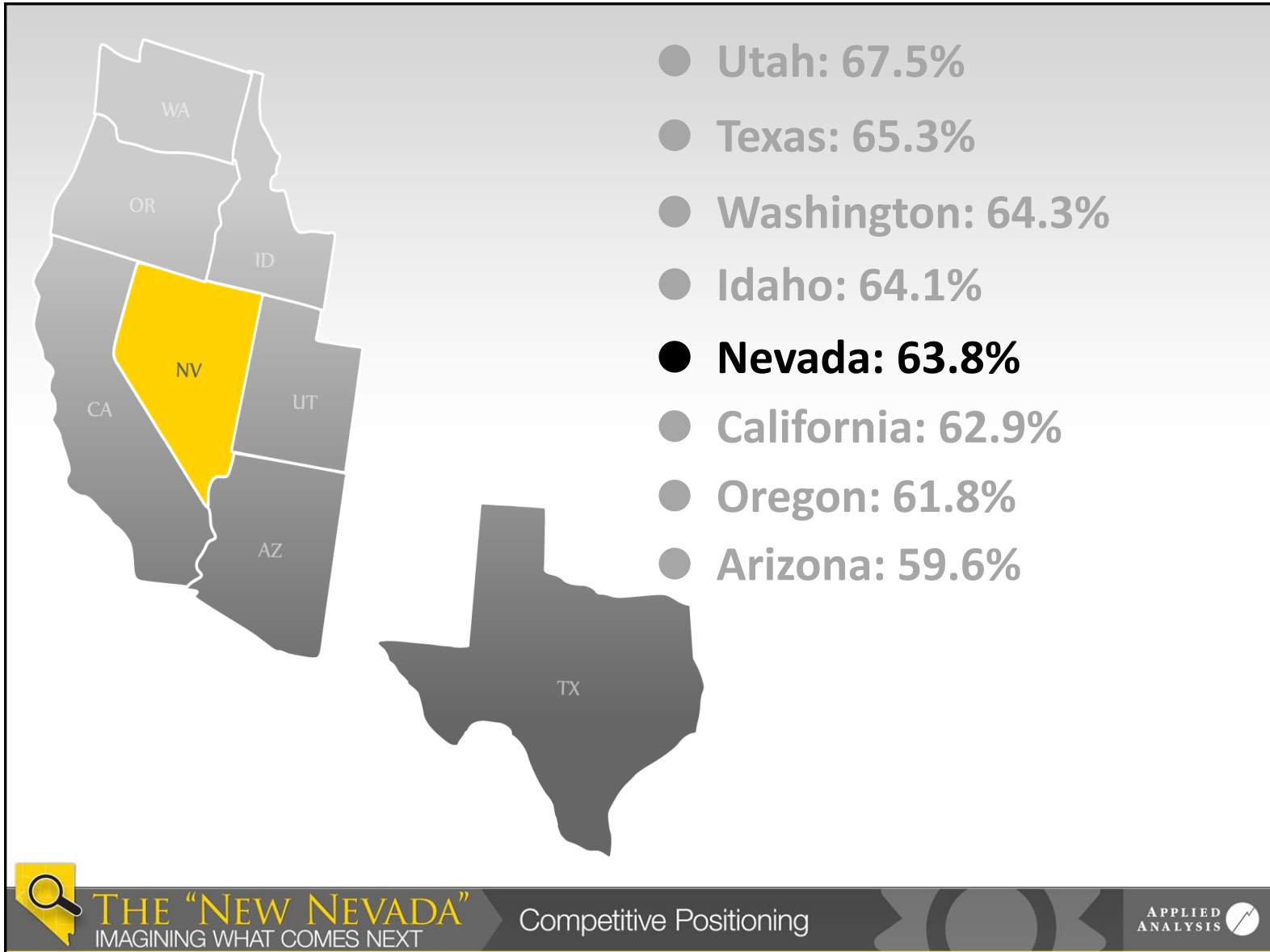
- **Utah: 67.5%**
- **Texas: 65.3%**
- **Washington: 64.3%**
- **Idaho: 64.1%**
- **California: 62.9%**
- **Oregon: 61.8%**
- **Arizona: 59.6%**



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Competitive Positioning

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THE "NEW NEVADA"
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Competitive Positioning



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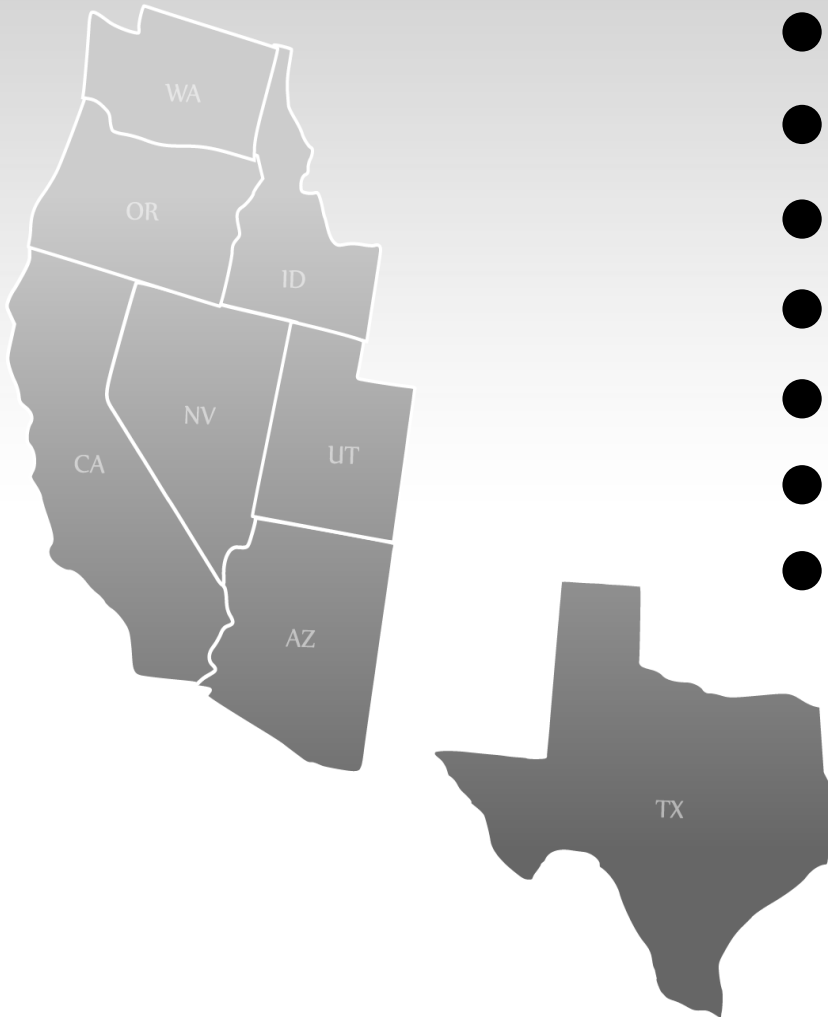
Average Age



THE "NEW NEVADA"
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APPLIED ANALYSIS 



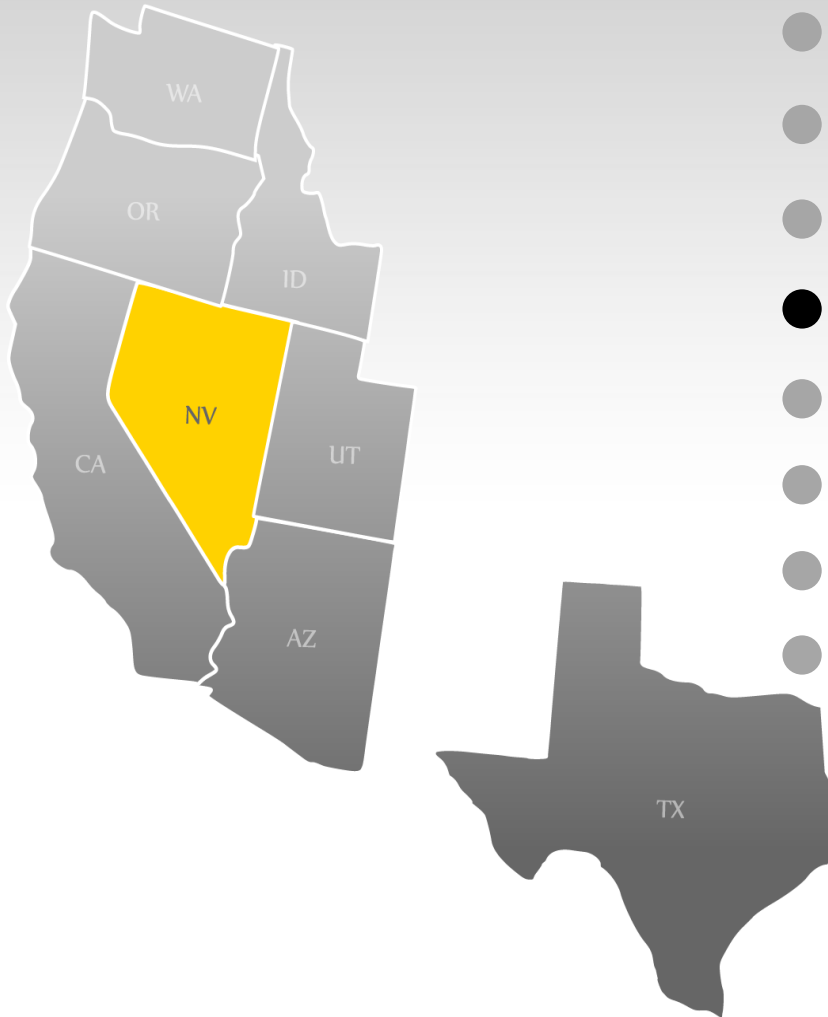
- Oregon: 39.3 Years
- Washington: 38.3 Years
- Arizona: 37.6 Years
- California: 37.0 Years
- Idaho: 36.6 Years
- Texas: 35.6 Years
- Utah 32.7 Years



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- Oregon: 39.3 Years
- Washington: 38.3 Years
- Arizona: 37.6 Years
- **Nevada: 37.6 Years**
- California: 37.0 Years
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- Texas: 35.6 Years
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THE "NEW NEVADA"
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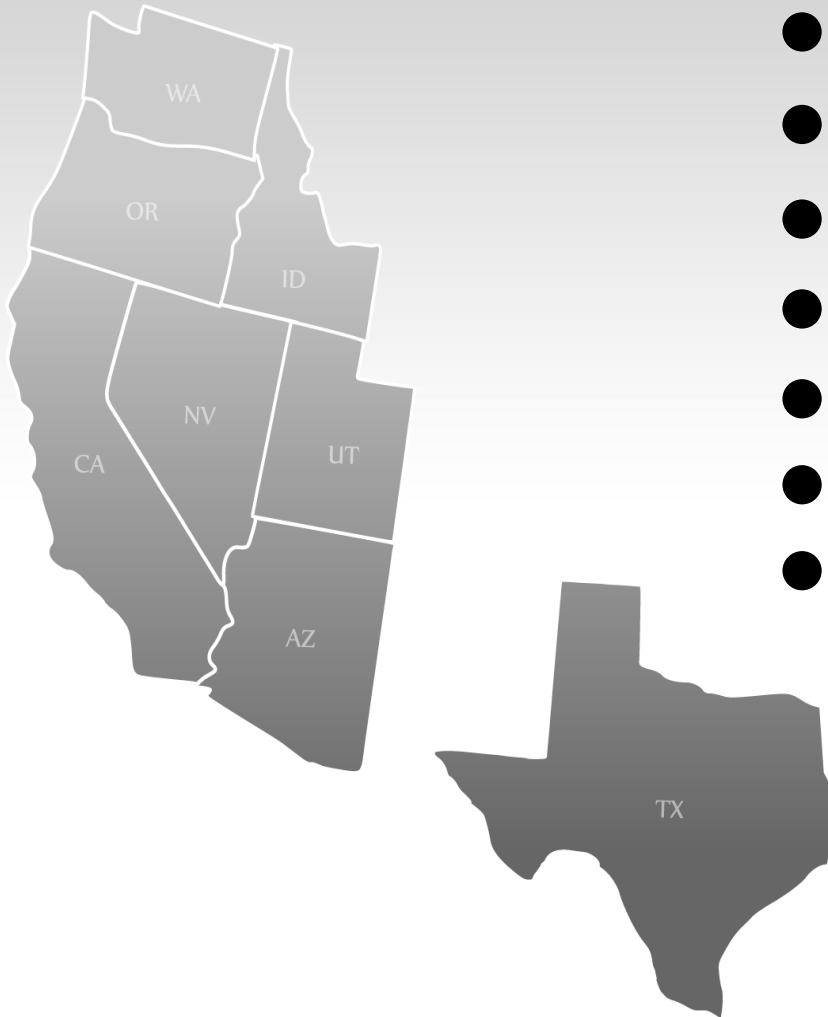
Personal Income



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- California: \$1,749,866
- Texas: \$1,104,807
- Washington: \$319,063
- Arizona: \$237,979
- Oregon: \$151,867
- Utah: \$101,262
- Idaho: \$54,707

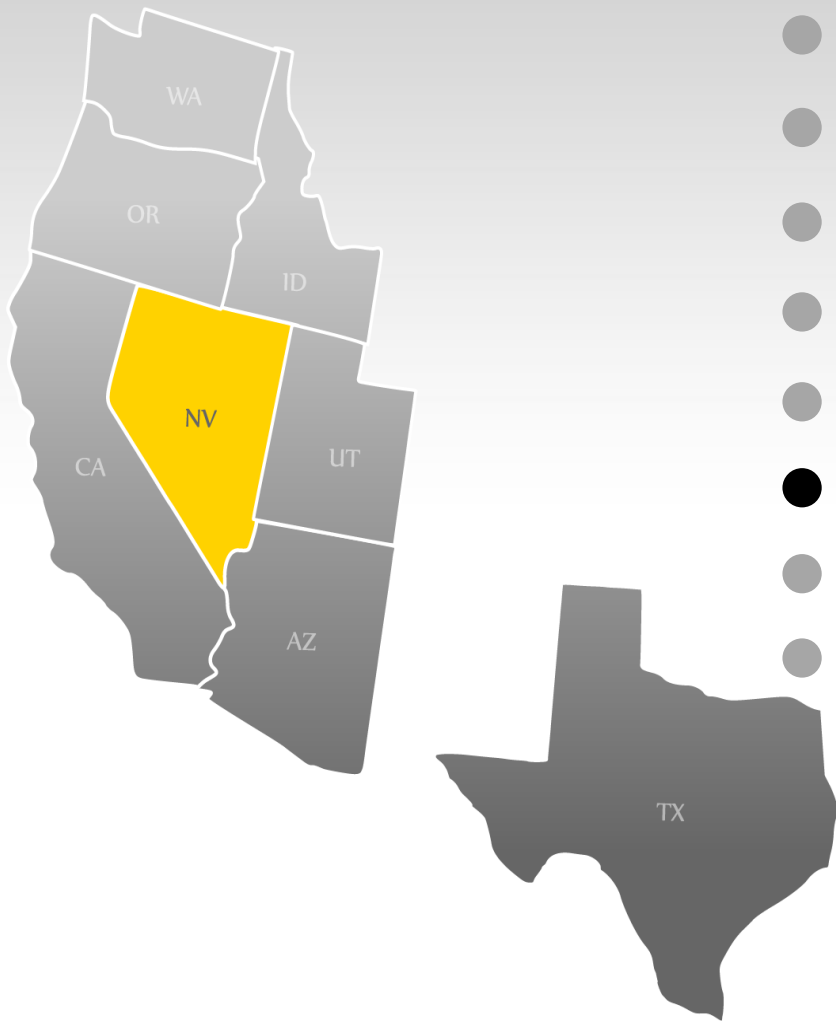
(In Millions of Dollars)



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- California: \$1,749,866
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(In Millions of Dollars)



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Competitive Positioning

APPLIED ANALYSIS 

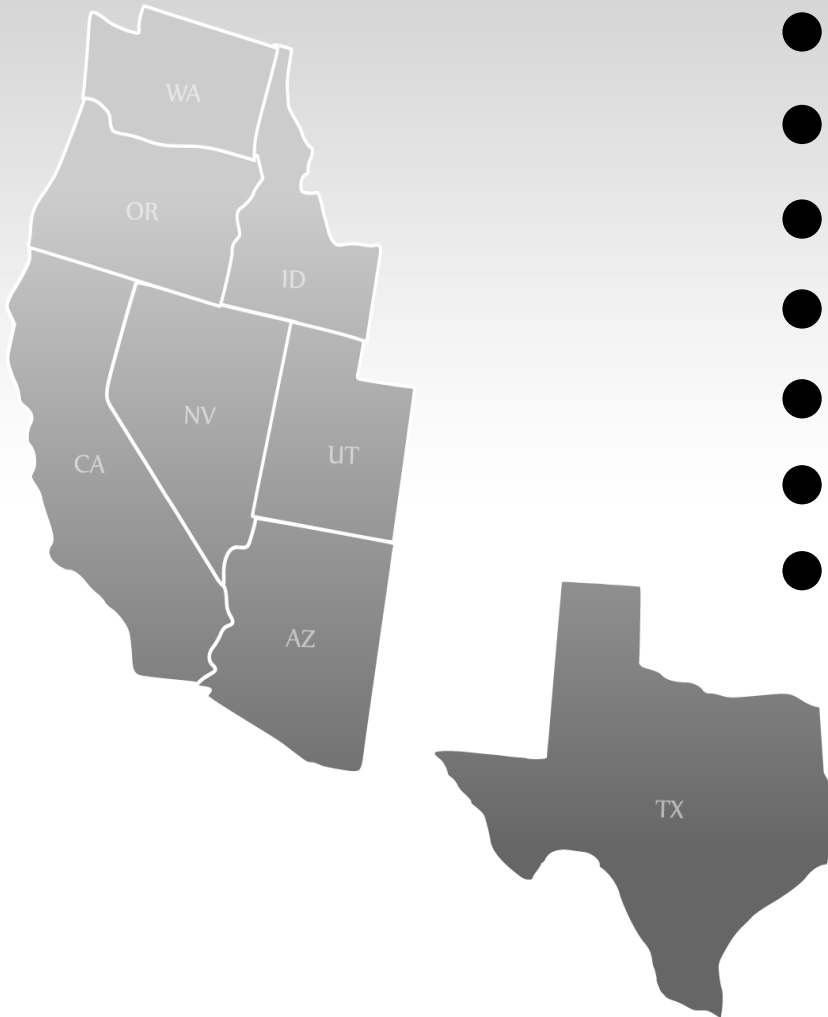
Personal Income Per Capita



THE "NEW NEVADA"
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Competitive Positioning

APPLIED
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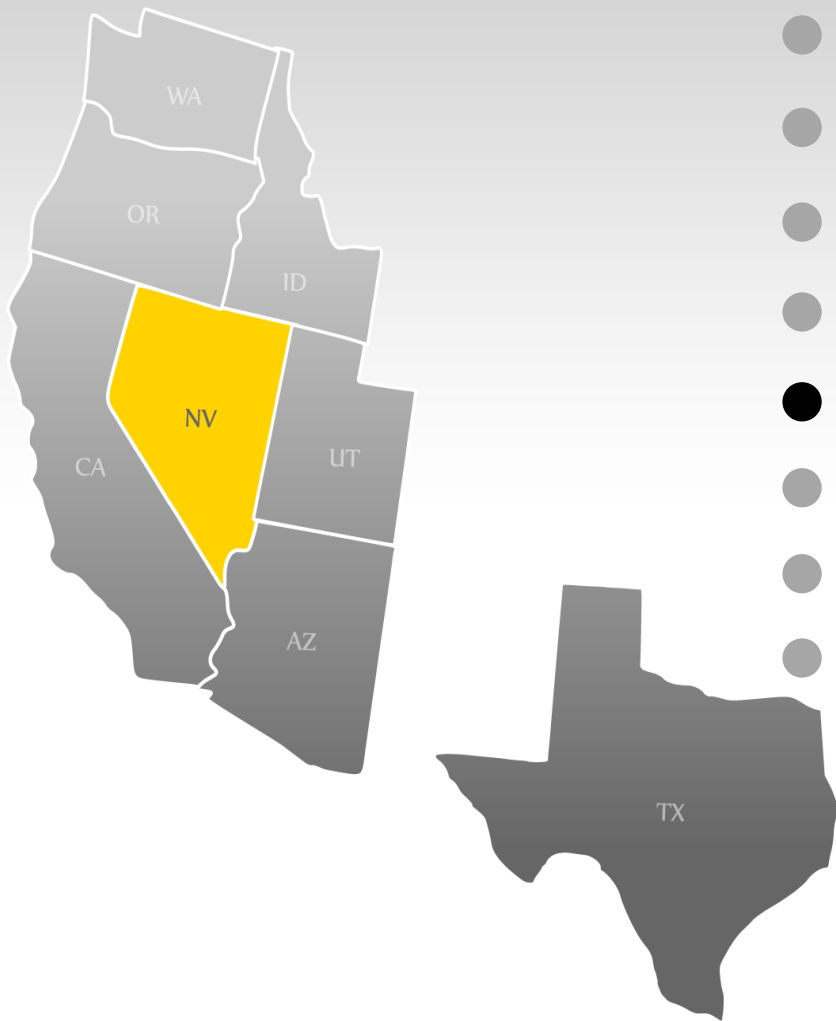
- **Washington: \$45,413**
- **California: \$44,980**
- **Texas: \$41,471**
- **Oregon: \$38,786**
- **Arizona: \$35,979**
- **Utah: \$34,601**
- **Idaho: \$33,749**



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- Washington: \$45,413
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THE "NEW NEVADA"
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Competitive Positioning



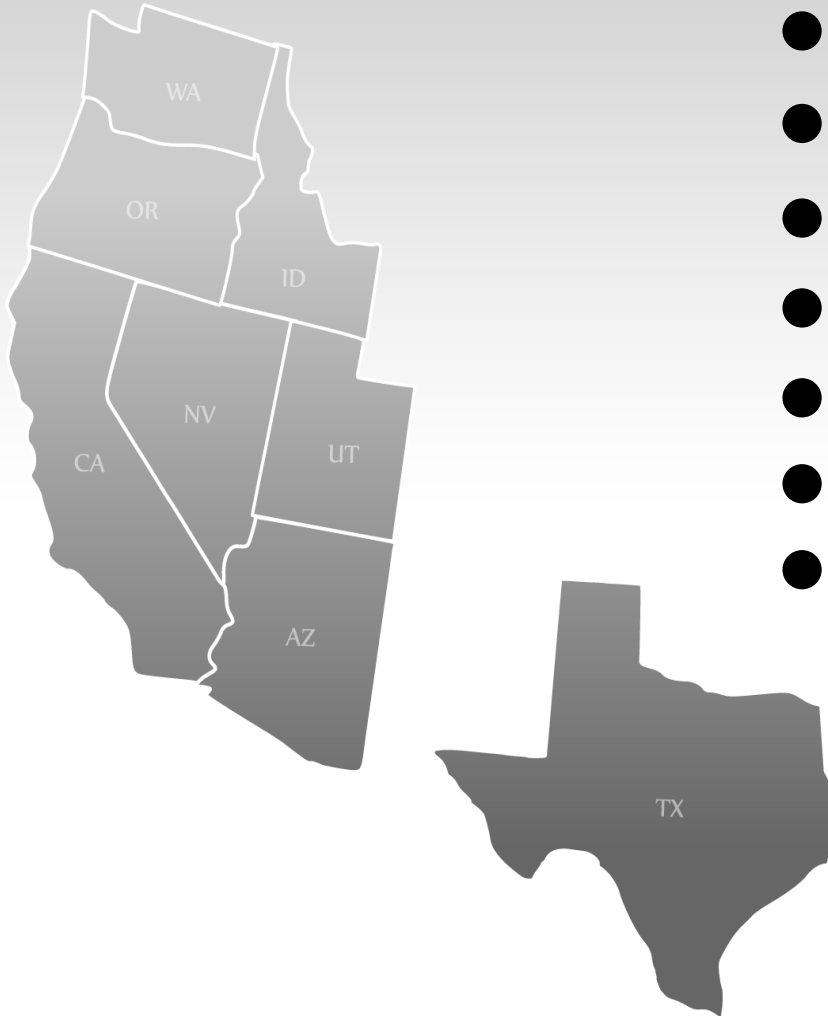
Adult Population w/Bachelor's Degree or Higher



THE "NEW NEVADA"
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Competitive Positioning

APPLIED
ANALYSIS 



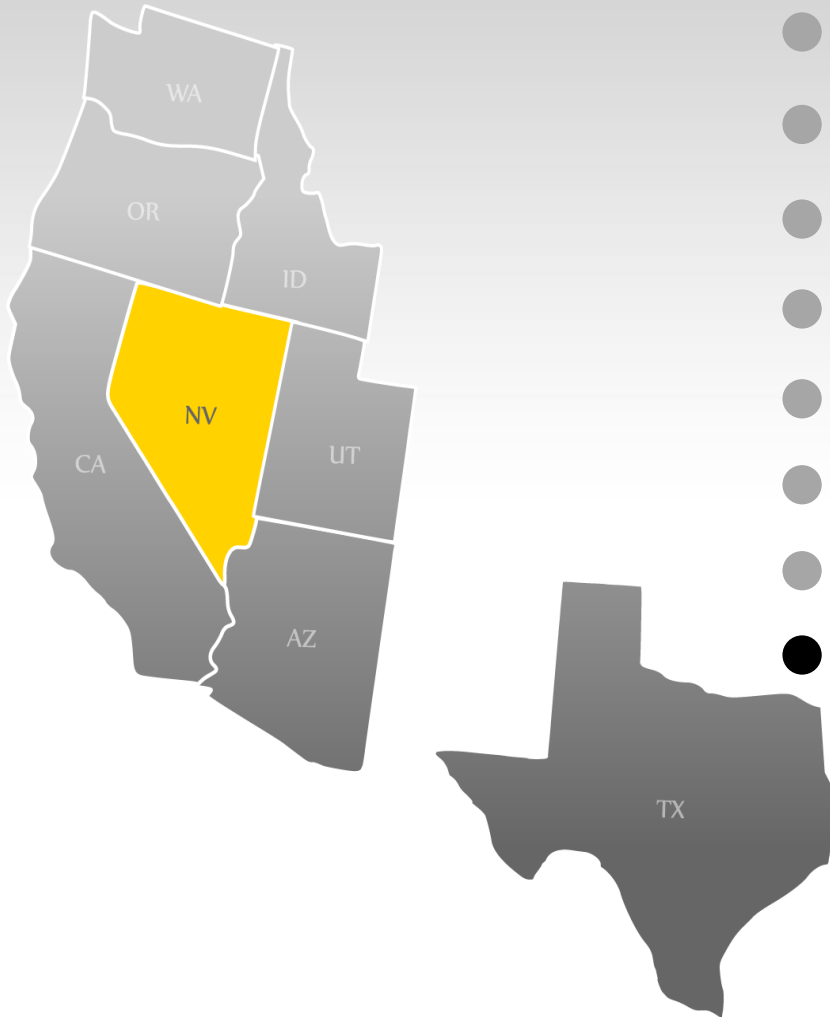
- **Washington: 31.9%**
- **California: 30.3%**
- **Utah: 29.7%**
- **Oregon: 29.3%**
- **Arizona: 26.6%**
- **Texas: 26.4%**
- **Idaho: 25.2%**



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- Washington: 31.9%
- California: 30.3%
- Utah: 29.7%
- Oregon: 29.3%
- Arizona: 26.6%
- Texas: 26.4%
- Idaho: 25.2%
- **Nevada: 22.5%**



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APPLIED ANALYSIS 

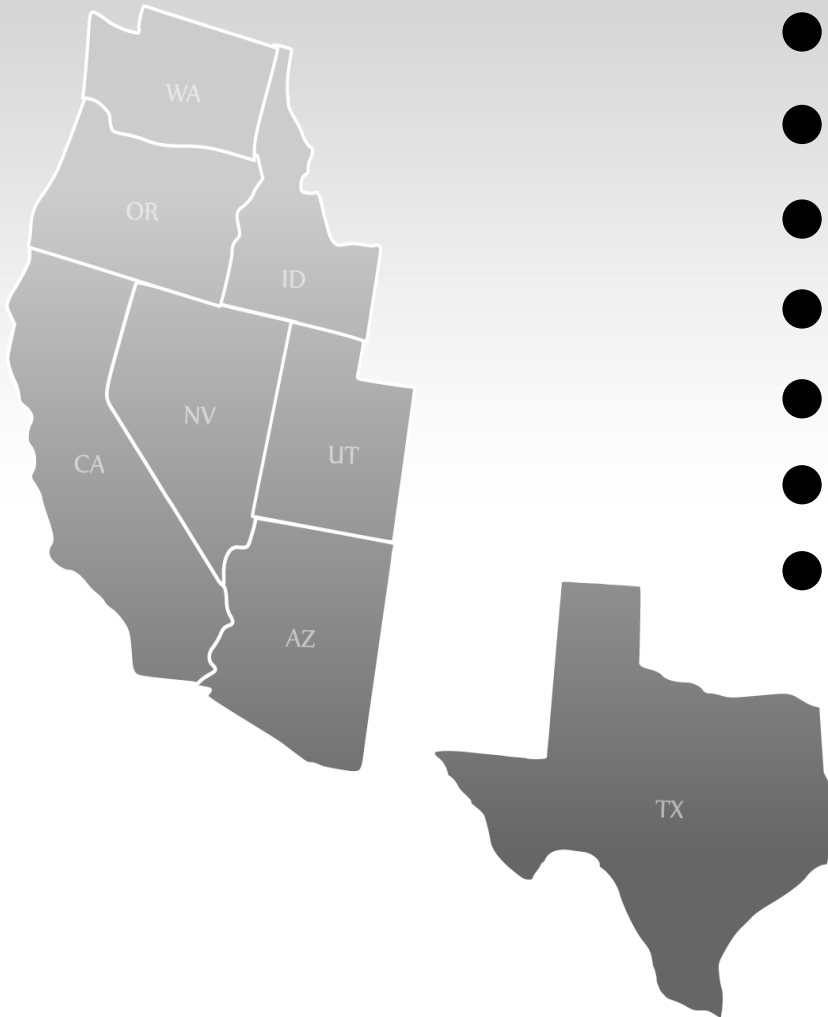
High School Graduation Rate



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Competitive Positioning

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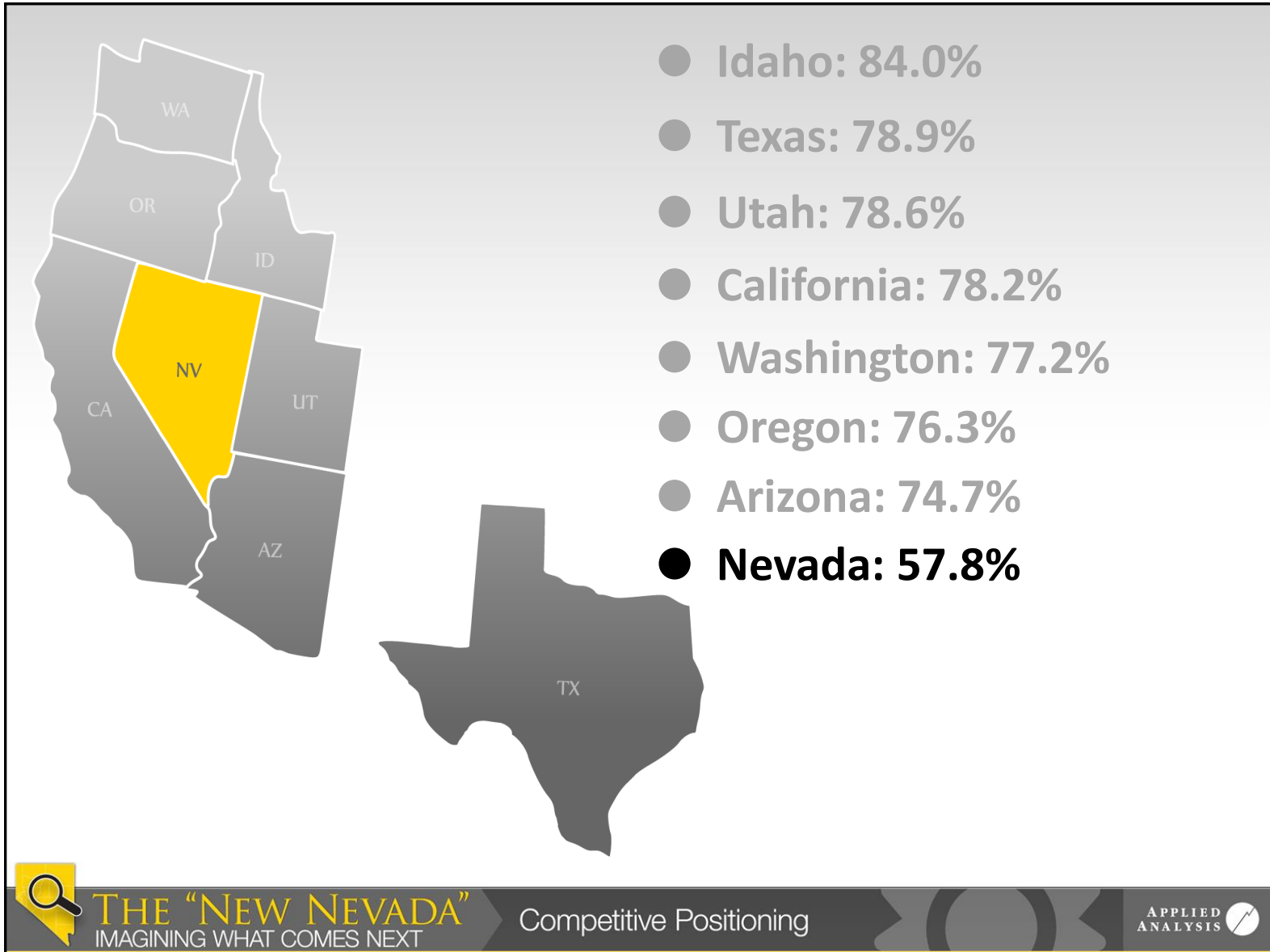
- Idaho: 84.0%
- Texas: 78.9%
- Utah: 78.6%
- California: 78.2%
- Washington: 77.2%
- Oregon: 76.3%
- Arizona: 74.7%



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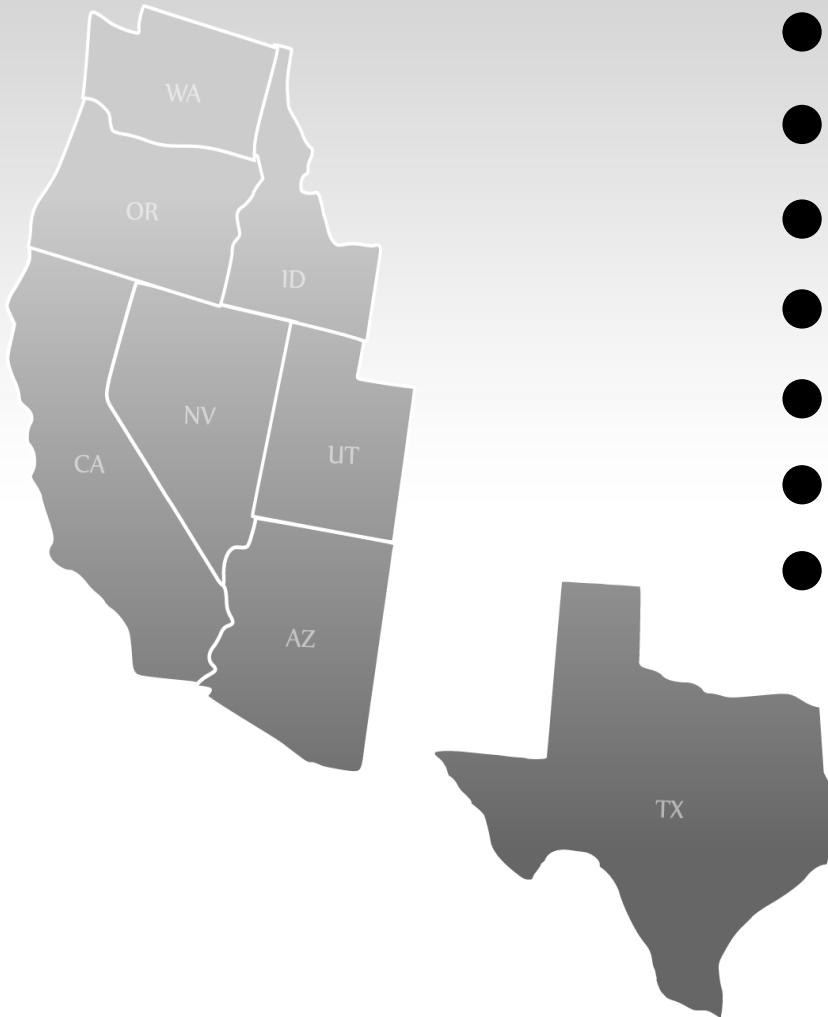
College/University Attendance



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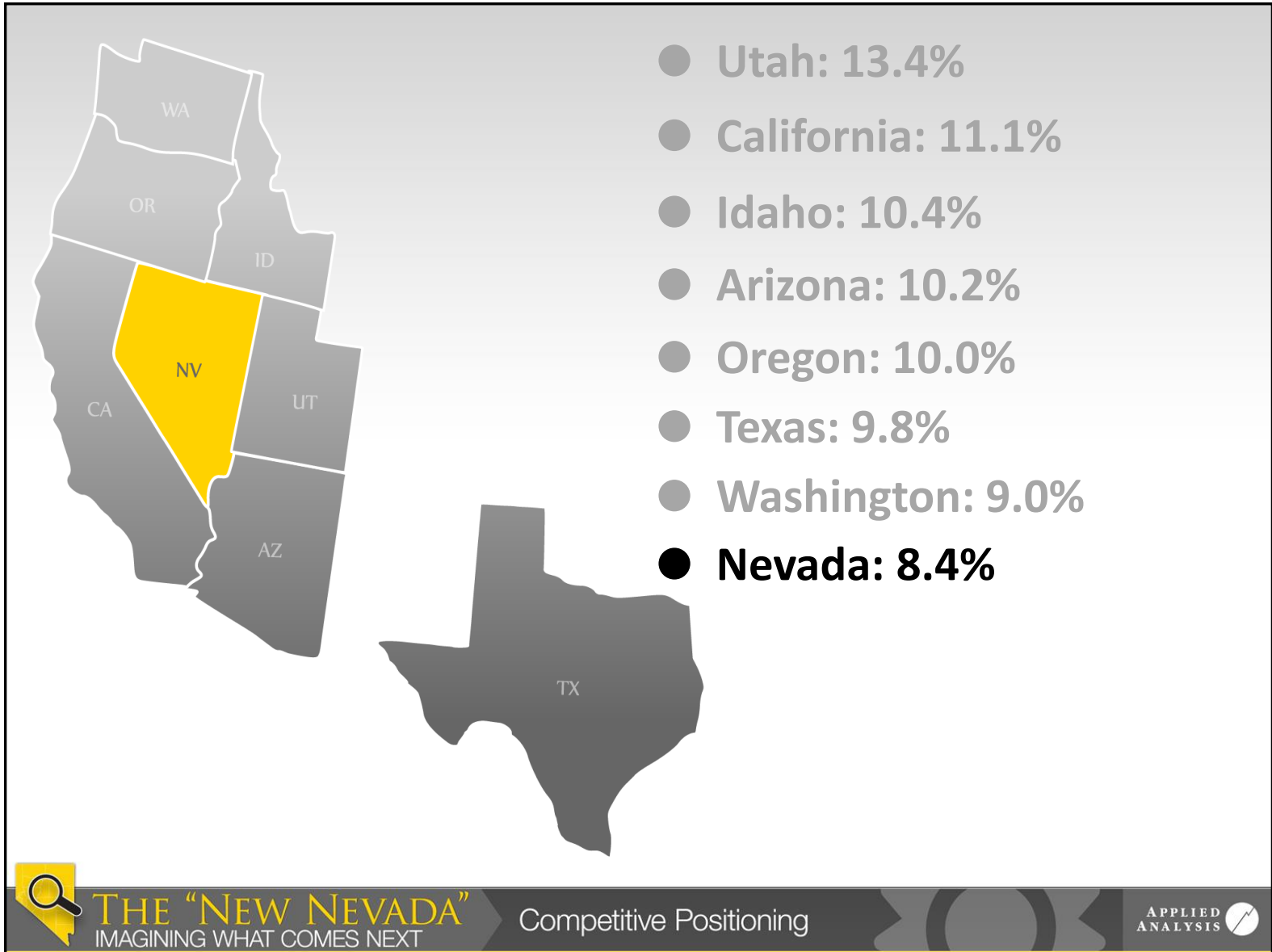
- **Utah: 13.4%**
- **California: 11.1%**
- **Idaho: 10.4%**
- **Arizona: 10.2%**
- **Oregon: 10.0%**
- **Texas: 9.8%**
- **Washington: 9.0%**



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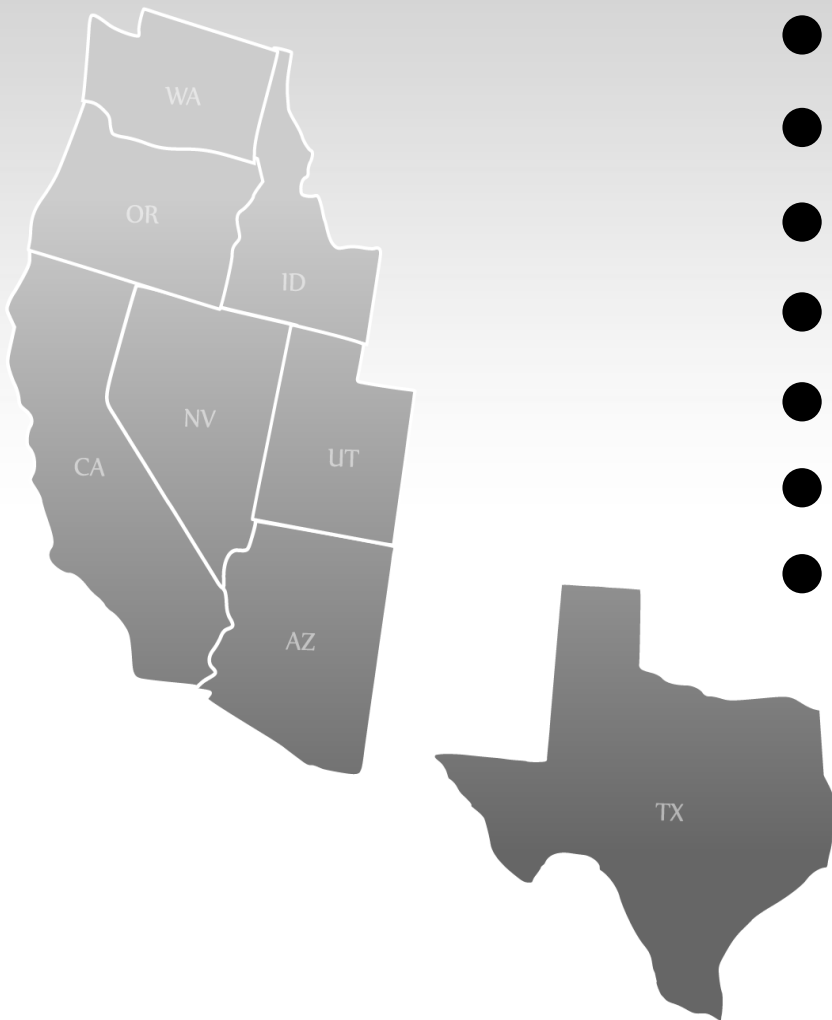
Speaks Language Other Than English at Home



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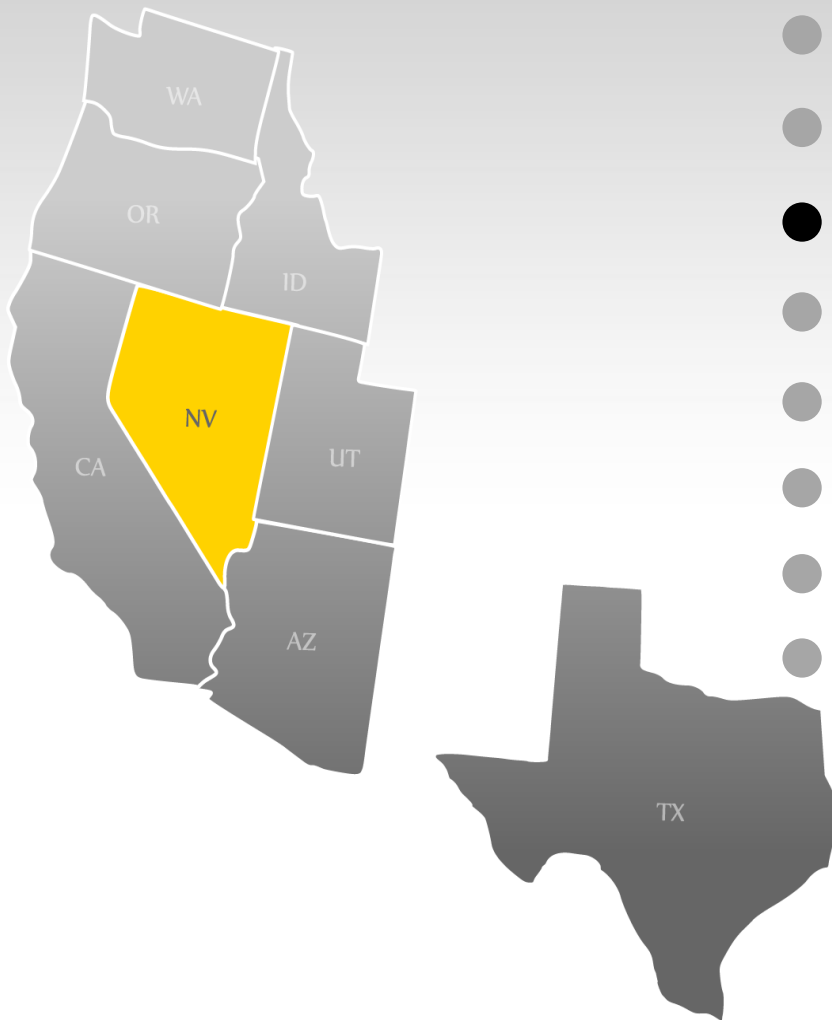
- **California: 43.8%**
- **Texas: 34.7%**
- **Arizona: 27.0%**
- **Washington: 18.6%**
- **Oregon: 14.9%**
- **Utah: 14.9%**
- **Idaho: 10.4%**



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Competitive Positioning

APPLIED ANALYSIS 



- California: 43.8%
- Texas: 34.7%
- **Nevada: 29.7%**
- Arizona: 27.0%
- Washington: 18.6%
- Oregon: 14.9%
- Utah: 14.9%
- Idaho: 10.4%



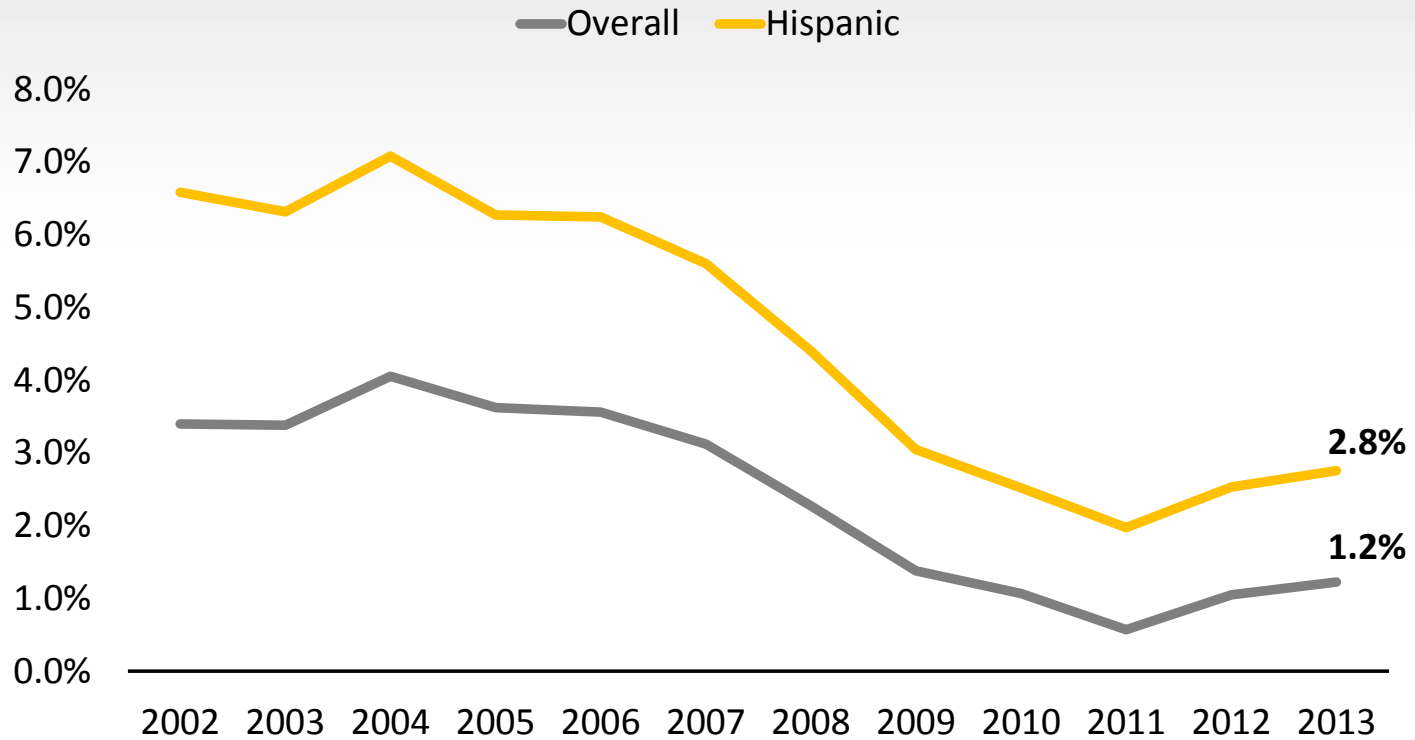
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Hispanic Population Growth Nevada



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Quality of Life

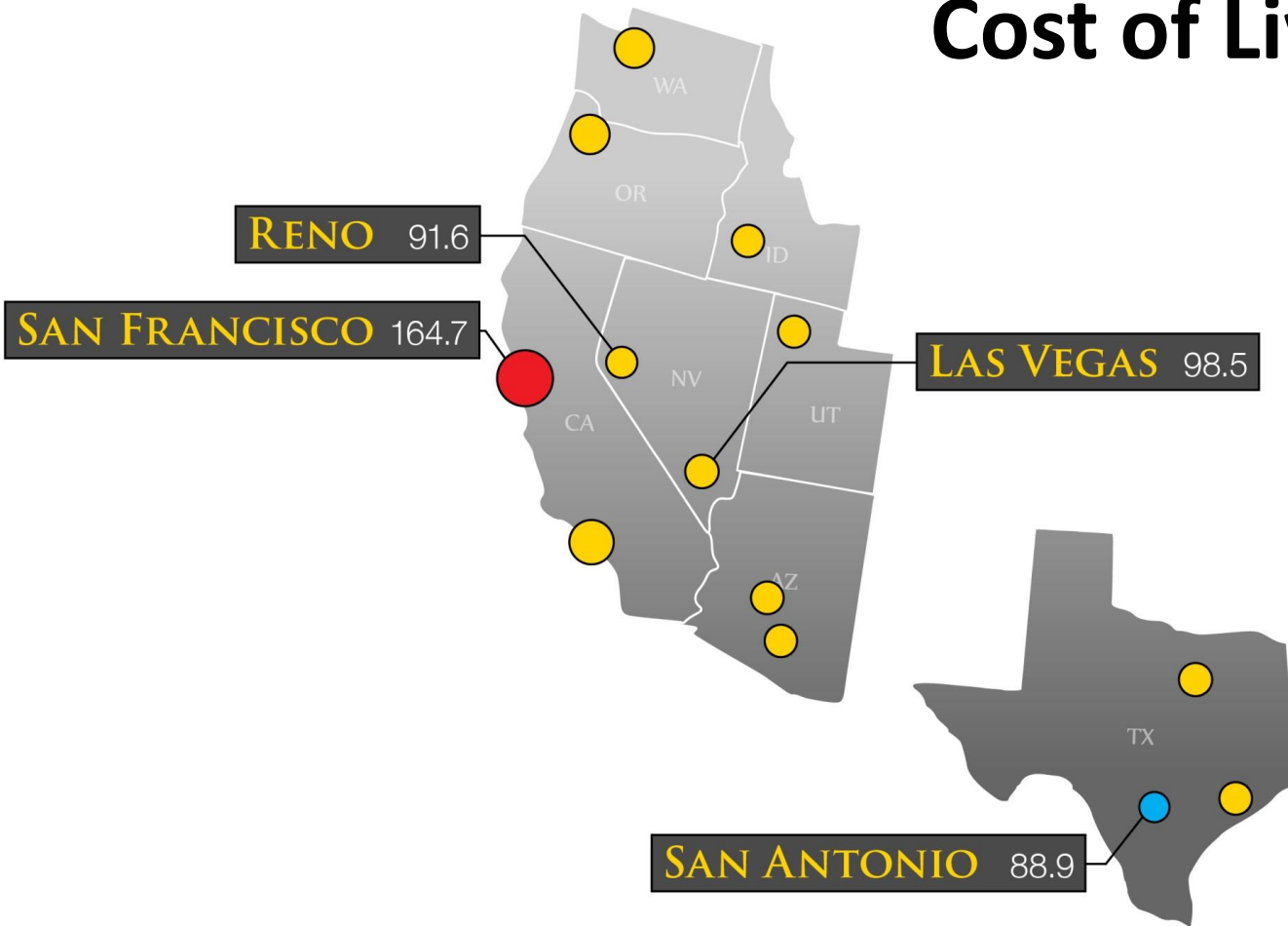


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Cost of Living



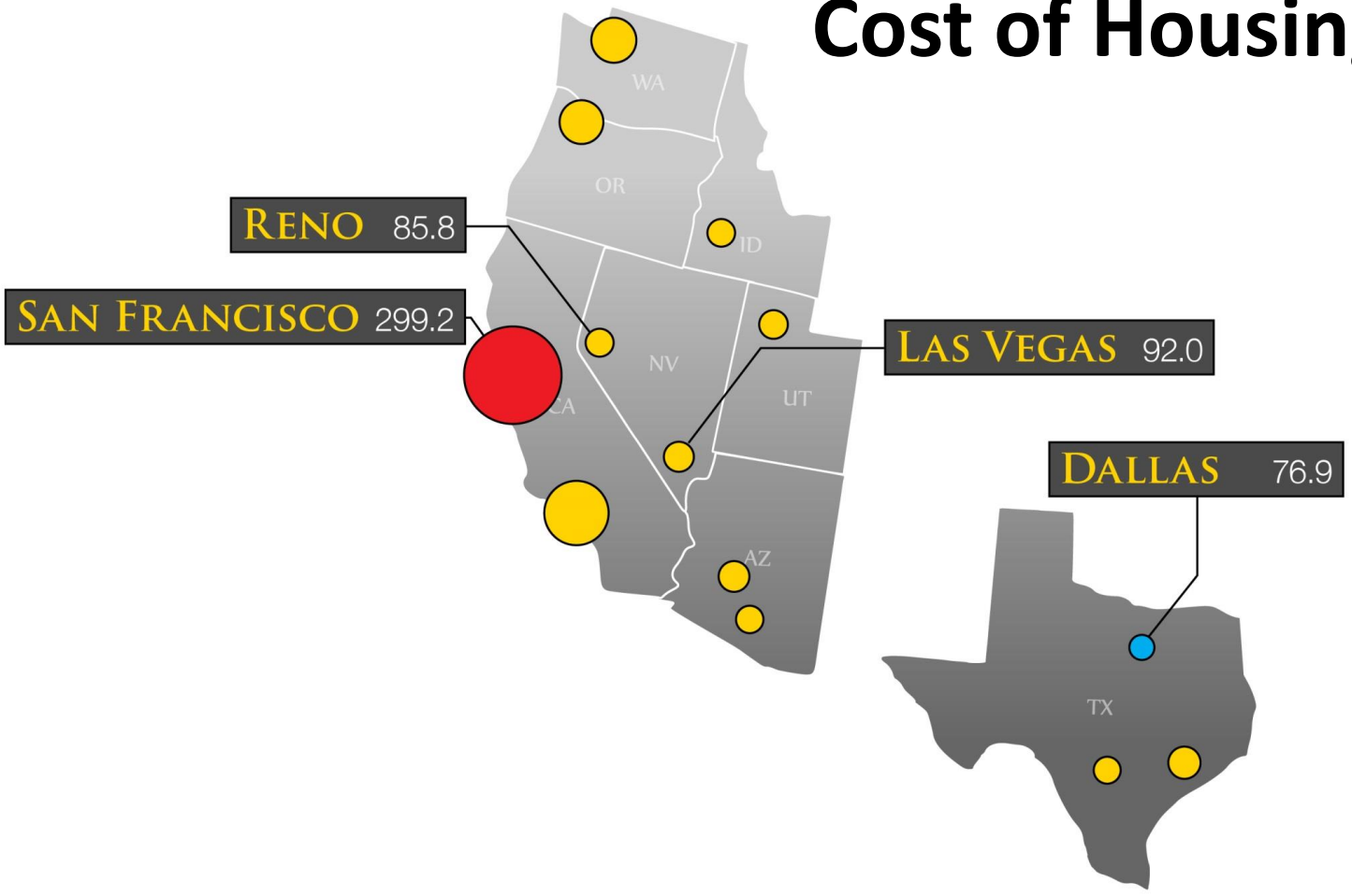
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Cost of Housing



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Perception



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“...the world’s greatest ghost town in waiting.”



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“In a city dotted with tens of thousands of vacant houses, Jericho Guarin figured it would be easy to buy his first home.”

THE WALL STREET JOURNAL
WSJ.com


ECONOMY | July 9, 2013, 11:05 p.m. ET

Foreclosure Squeeze Crimps Las Vegas Real-Estate Market

By NICK TIMIRAOS [CONNECT](#)

LAS VEGAS—In a city dotted with tens of thousands of vacant houses, Jericho Guarin figured it would be easy to buy his first home. But nearly a year after beginning a search late last summer, he has come up dry.

“It has been a nightmare,” says the 37-year-old U.S. Air Force officer. “There are plenty of empty houses, but they’re just not for sale.”



Alex Federowicz for The Wall Street Journal

Houses are going up in a southwest Las Vegas development. Some builders have waiting lists of buyers locked out of the existing-home market.

Indeed, it is a lopsided equation. The number of available homes has plunged here after a sweeping state law subjected lenders to stiff new foreclosure rules and penalties. With banks exercising caution, many homeowners—including those seriously delinquent on their loans—have been allowed to remain in place. As a result, there is little on the market at a time when first-time buyers and real-estate speculators are anxious to tap both cheap prices and low-interest mortgages.

Many real-estate agents, home builders and consumer advocates argue that the law, intended to remedy foreclosure-processing abuses, has backfired. Some owners who are behind on payments aren’t maintaining their homes as banks refrain from eviction proceedings. The perverse outcome: Inventory shortages have spurred new developments despite a glut of properties stuck in foreclosure limbo.

“The people hurt most by this law are the middle class,” says Steve Hawks, a real-estate agent in Henderson, Nev. He refers to the phenomenon wrought by the foreclosure measure, Assembly Bill 284, as the “A.B. 284 bubble.”

Until last decade’s housing boom, prices didn’t rise much here, making it possible for casino dealers or cocktail waitresses to buy into the American dream. Now, a tight market is pushing up values and making it harder for buyers to find homes to purchase.

Mr. Guarin, the Air Force Captain, is preapproved for a mortgage backed by the Veterans Administration for up to \$185,000. But like many buyers who need financing, he is at a severe



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\$14.6 Billion



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THE NEW NEVADA



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Mega Trends

1. There is no technology sector, technology is the common denominator



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Mega Trends

1. There is no “technology” sector, technology is the common denominator
2. Time to leverage strengths and weaknesses



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Mega Trends

1. There is no “technology” sector, technology is the common denominator
2. Time to leverage strengths and weaknesses
3. If we don't find a way to embrace diversity, it will consume us



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Mega Trends

1. There is no “technology” sector, technology is the common denominator
2. Time to leverage strengths and weaknesses
3. If we don’t find a way to embrace diversity, it will consume us
4. Managing perception as much as reality



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Technology is the Common Denominator



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Mega Trends

1. There is no “technology” sector, technology is the common denominator
2. Time to leverage strengths and weaknesses
3. If we don’t find a way to embrace diversity, it will consume us
4. Managing perception as much as reality
5. Think small



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Health and Medical Services



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1,300

937



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#2



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#1



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15-18%

53%



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Lung Cancer in Nevada

Minimally Invasive Surgical Approach:

- Shorter hospital stays
- Decreased intraoperative blood loss
- Less in-hospital pain interventions and narcotic usage
- Less impairment of pulmonary function
- Done at MountainView's Cardiovascular & Thoracic Surgery Center



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\$85 M



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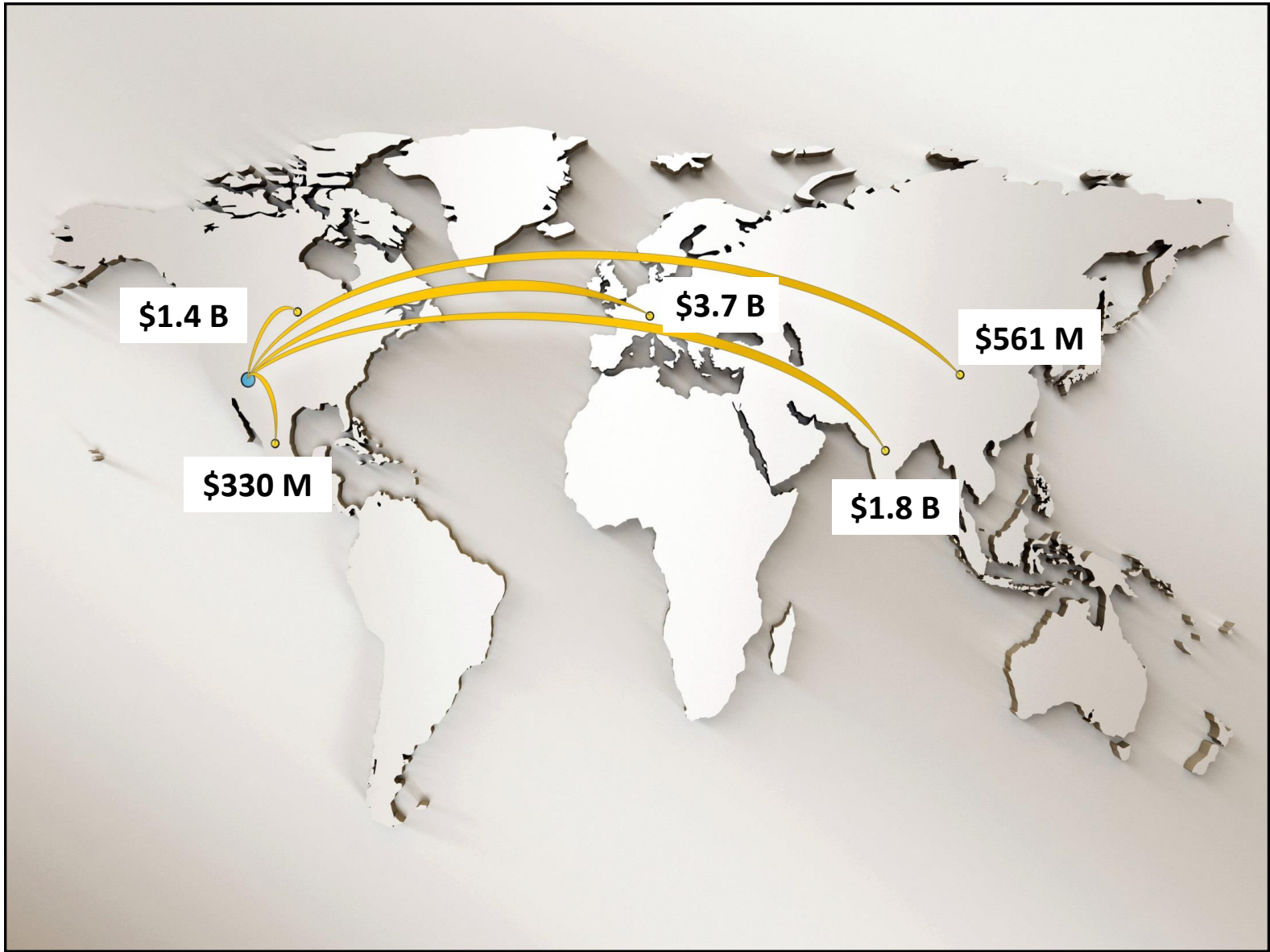
Manufacturing



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WESTERN WLC LITHIUM



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Mining and Materials



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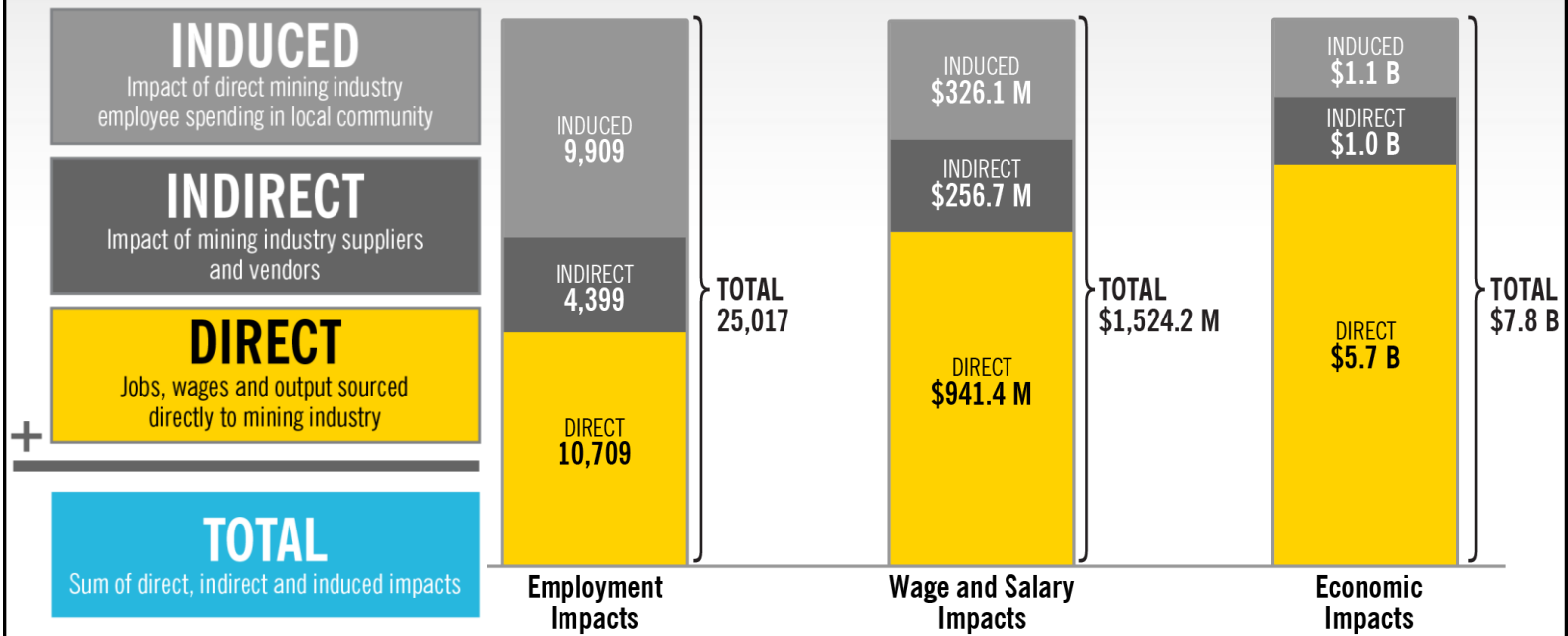
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Nevada Mining Economic Impacts

2011



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Daily Price of Gold



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Clean Energy and Sustainability



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Sierra BioFuels Plant
10.5 Million Gallons of Ethanol
Production Annually
Storey County, NV



KOMIPO



Terra-Gen Power, LLC



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Aerospace and Defense



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32,771

\$922.9 M



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5,637

\$229.7 M



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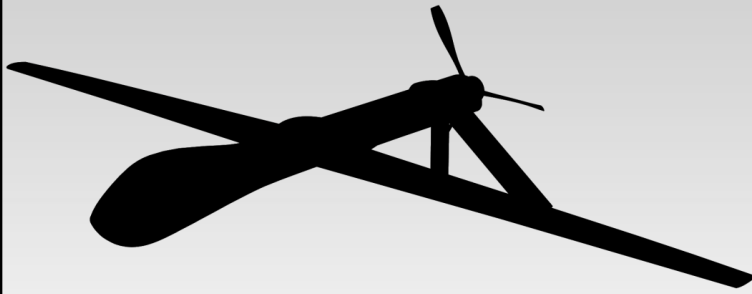
\$5.1 B



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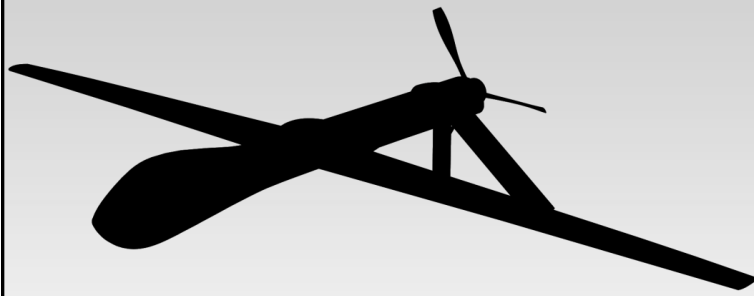
30,000 UAV



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FAA Center of Excellence



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**“The expanding use of
unmanned aerial vehicles...has
UNLV considering the creation
of a drones minor program...”**

--LVRJ, 7/7/2013



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CRISTEK

INTERCONNECTS, INC.



UIC
TECHNICAL SERVICES



Bowhead
A UIC Alaska Native Corporation



snc SIERRA
NEVADA
CORPORATION

ELECTRONIC SYSTEMS AND INTEGRATION

INNOVATIVE & AGILE TECHNOLOGY SOLUTIONS



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Technology Infrastructure



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Logistics and Operations



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Fab. ♥

Smile, you're designed to



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Leisure and Hospitality



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Philip
Michael
Brown
Studio

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Conceptual Design



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AMERICAN CASINO & ENTERTAINMENT
PROPERTIES, LLC



PLAYER VERIFY



XYVERIFY
PROXIMITY TO TRANSACT

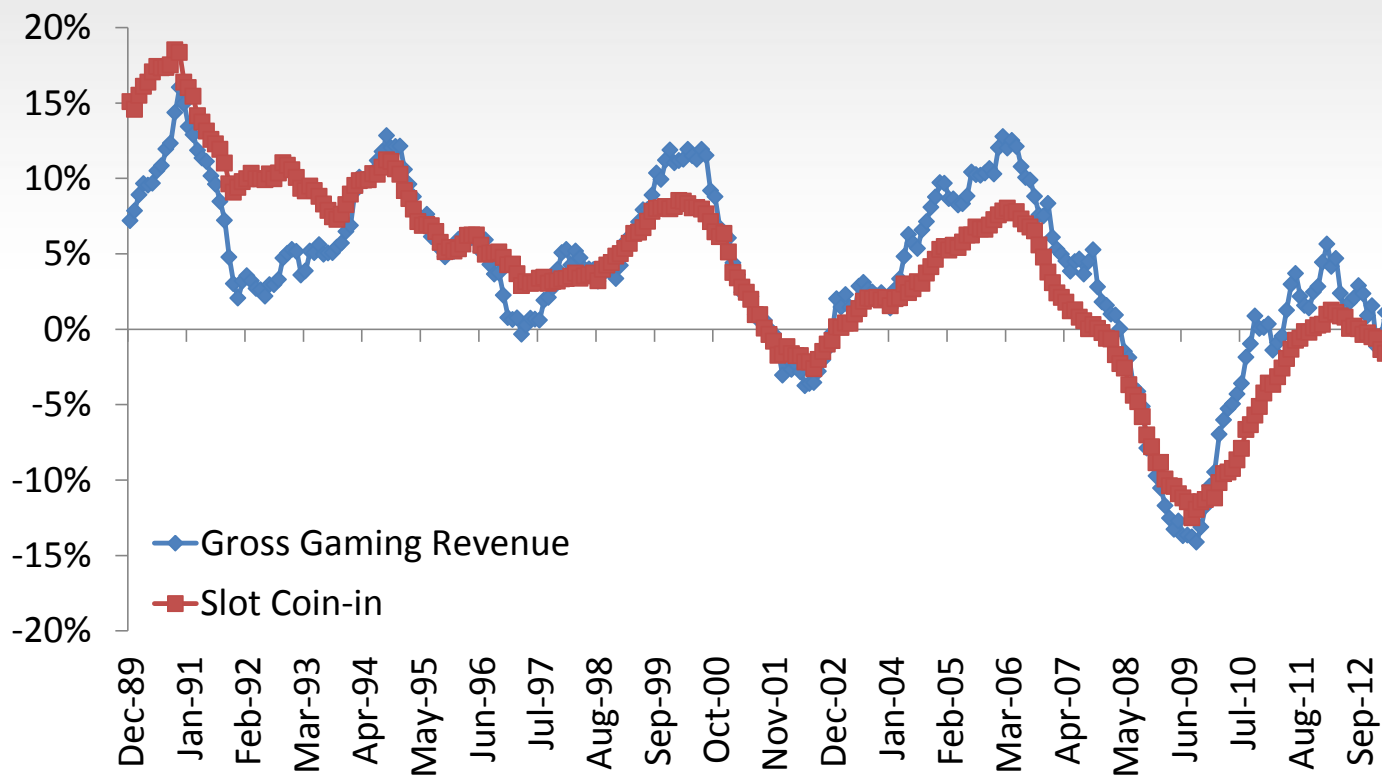


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Gross Gaming Revenue and Coin-In



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Agriculture



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10x



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70%



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Great Full



Gardens



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“Skillful warriors first make themselves invincible, then watch for vulnerability in their opponents.”

-- Sun Tzu, The Art of War



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