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**COMMERCIAL  
REAL ESTATE UPDATE**  
JUNE 25, 2014



# SOUTHERN NEVADA ECONOMY

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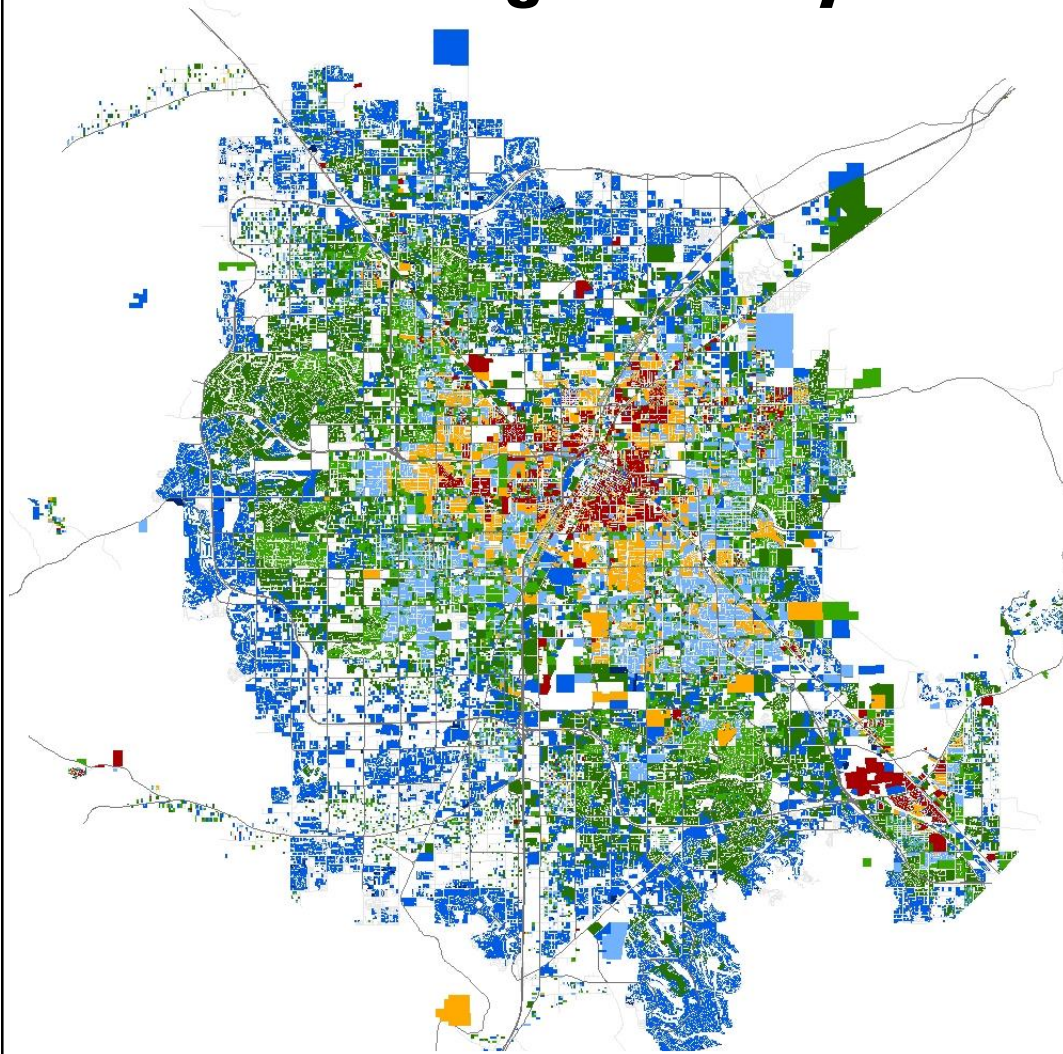
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# Las Vegas Valley



**2010's**

**2000's**

**1990's**

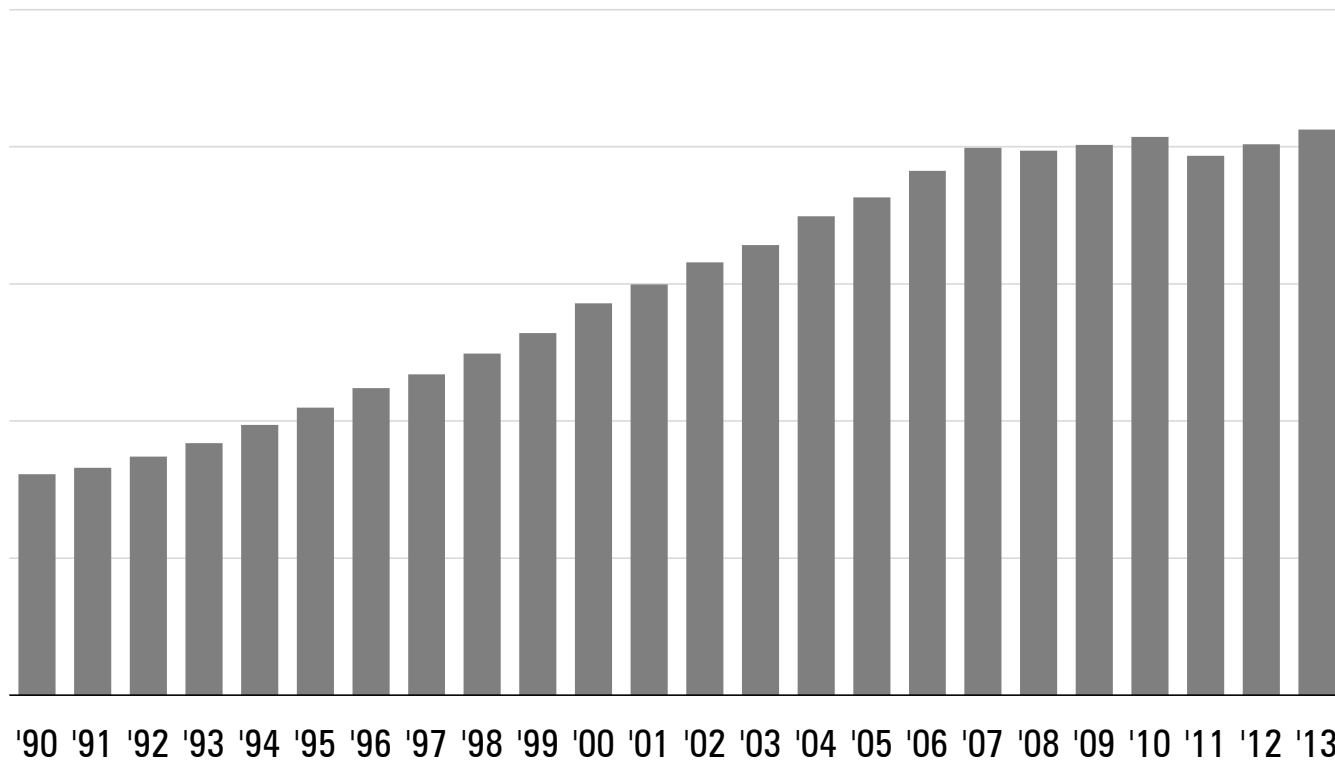
**1980's**

**1970's**

**1960's**

**1950's**

# Clark County Population



Source: Clark County Comprehensive Planning

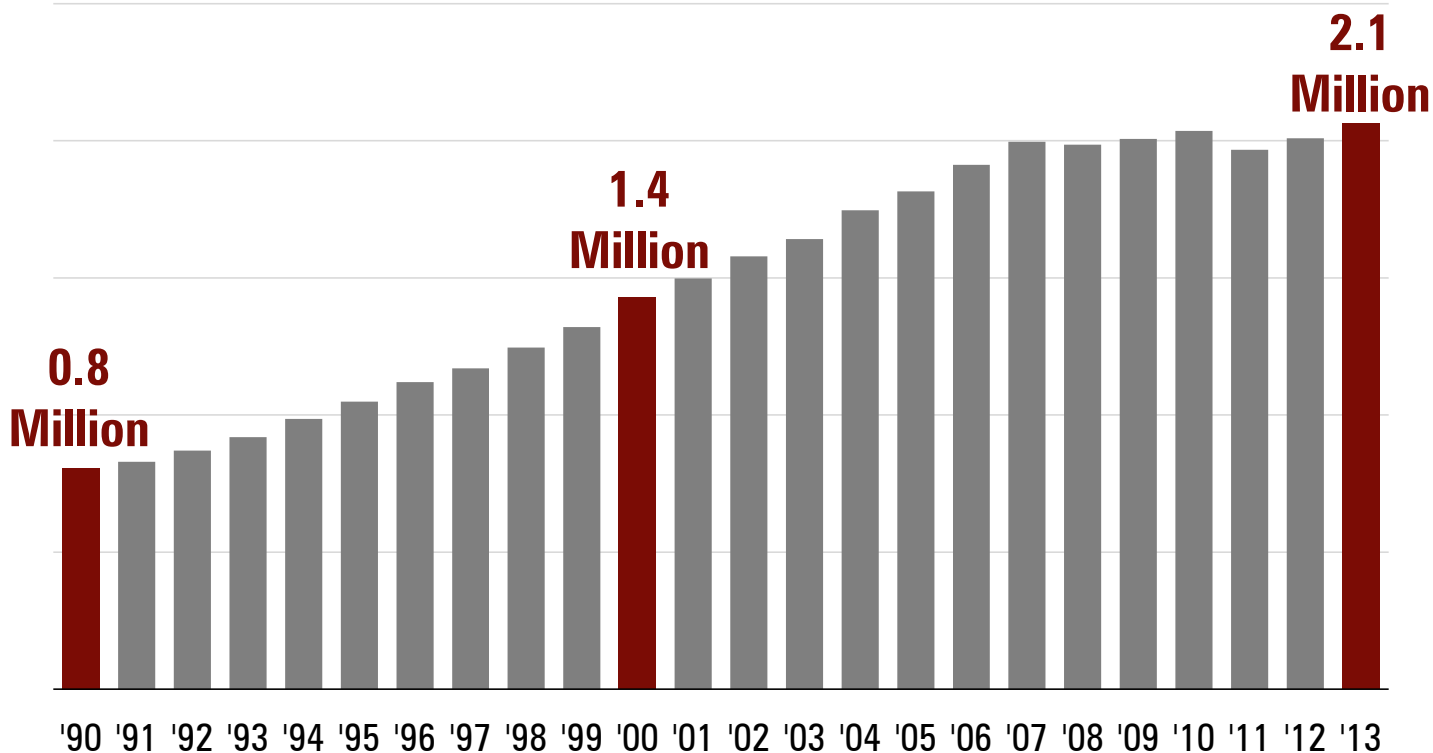
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# Clark County Population



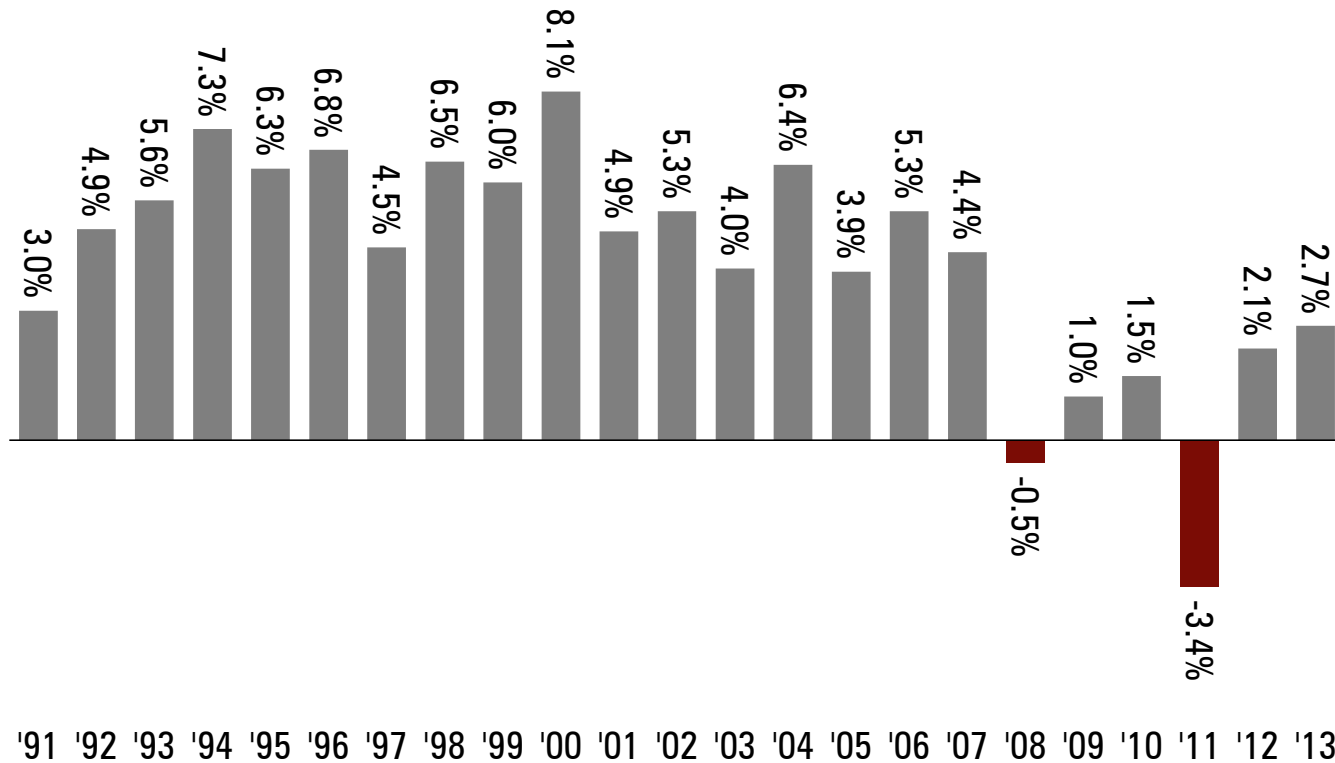
Source: Clark County Comprehensive Planning



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# Clark County Population Growth



Source: Clark County Comprehensive Planning

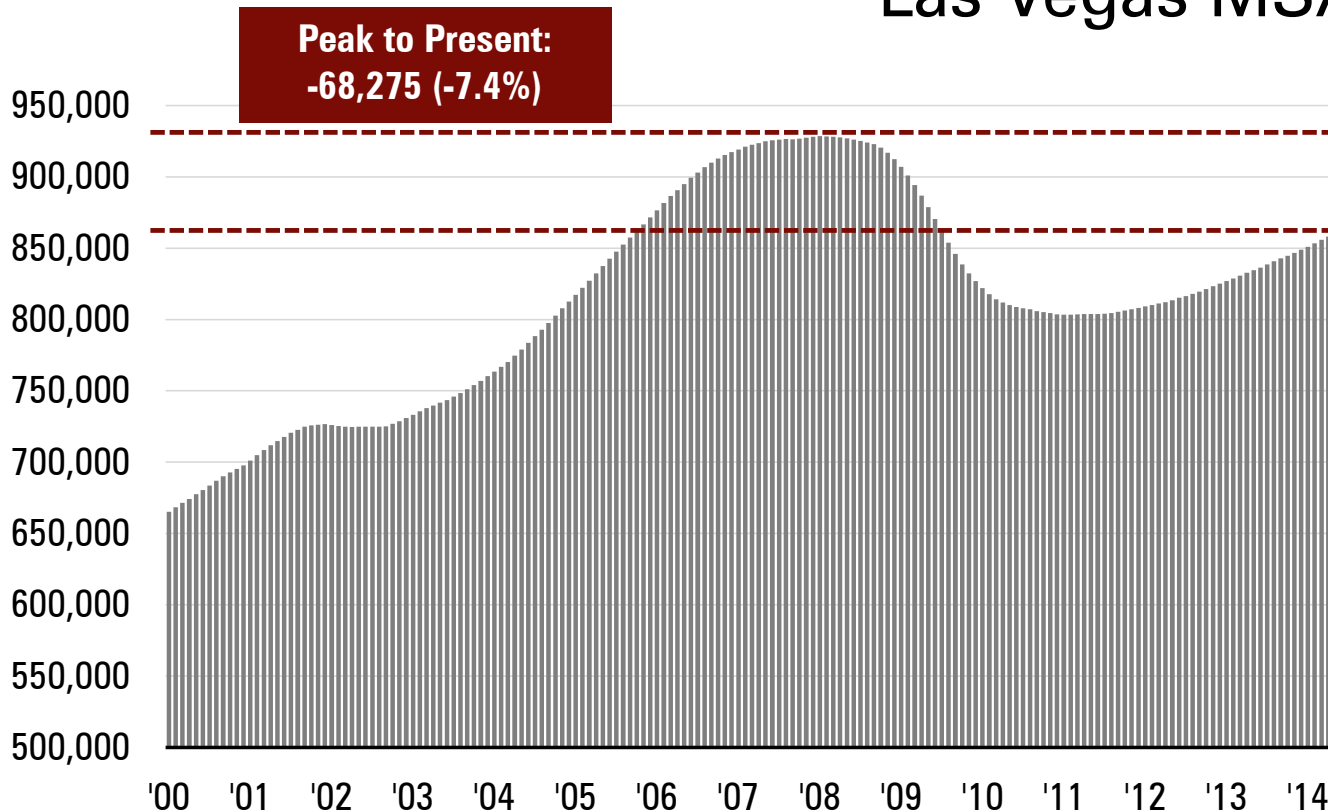
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# Employment Las Vegas MSA



Source: United States Bureau of Labor Statistics

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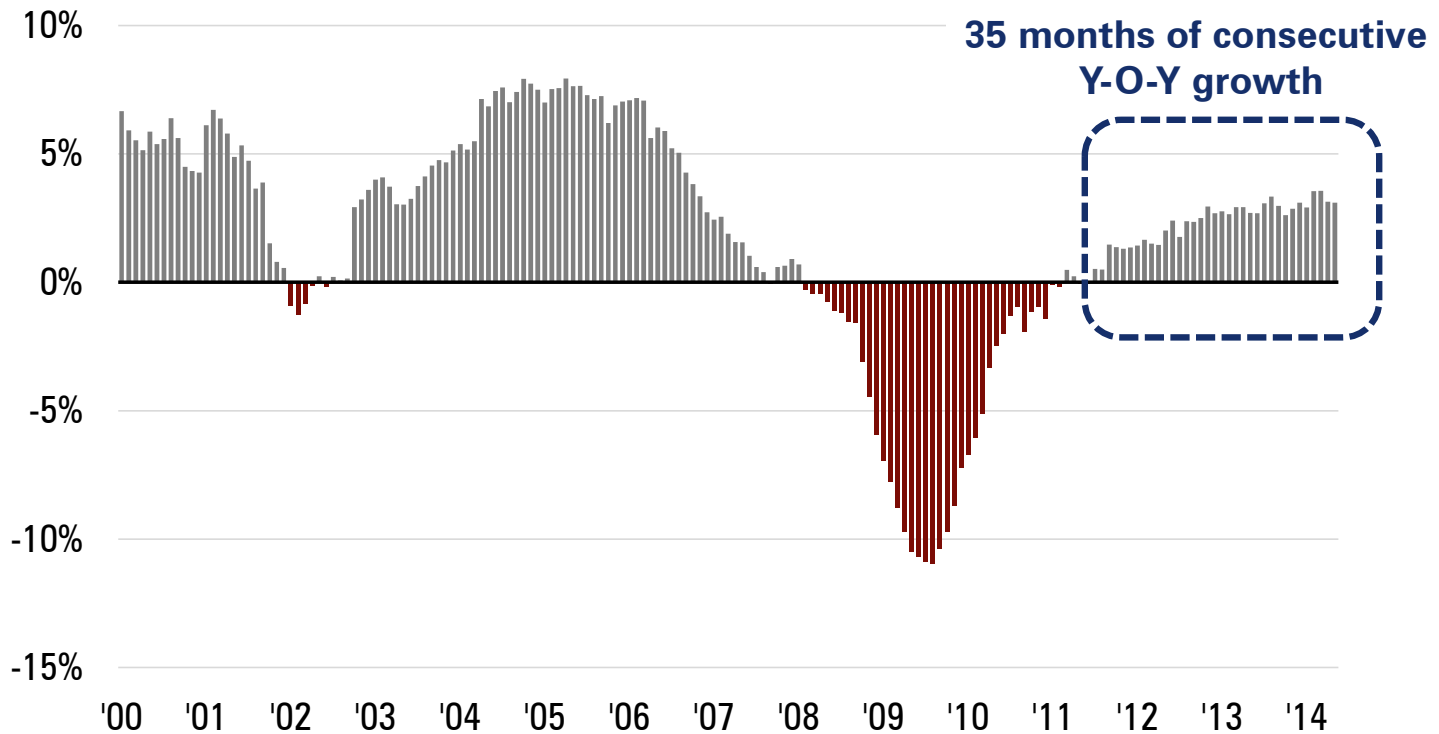
MARKETING  
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# Employment Growth Las Vegas MSA



Source: United States Bureau of Labor Statistics

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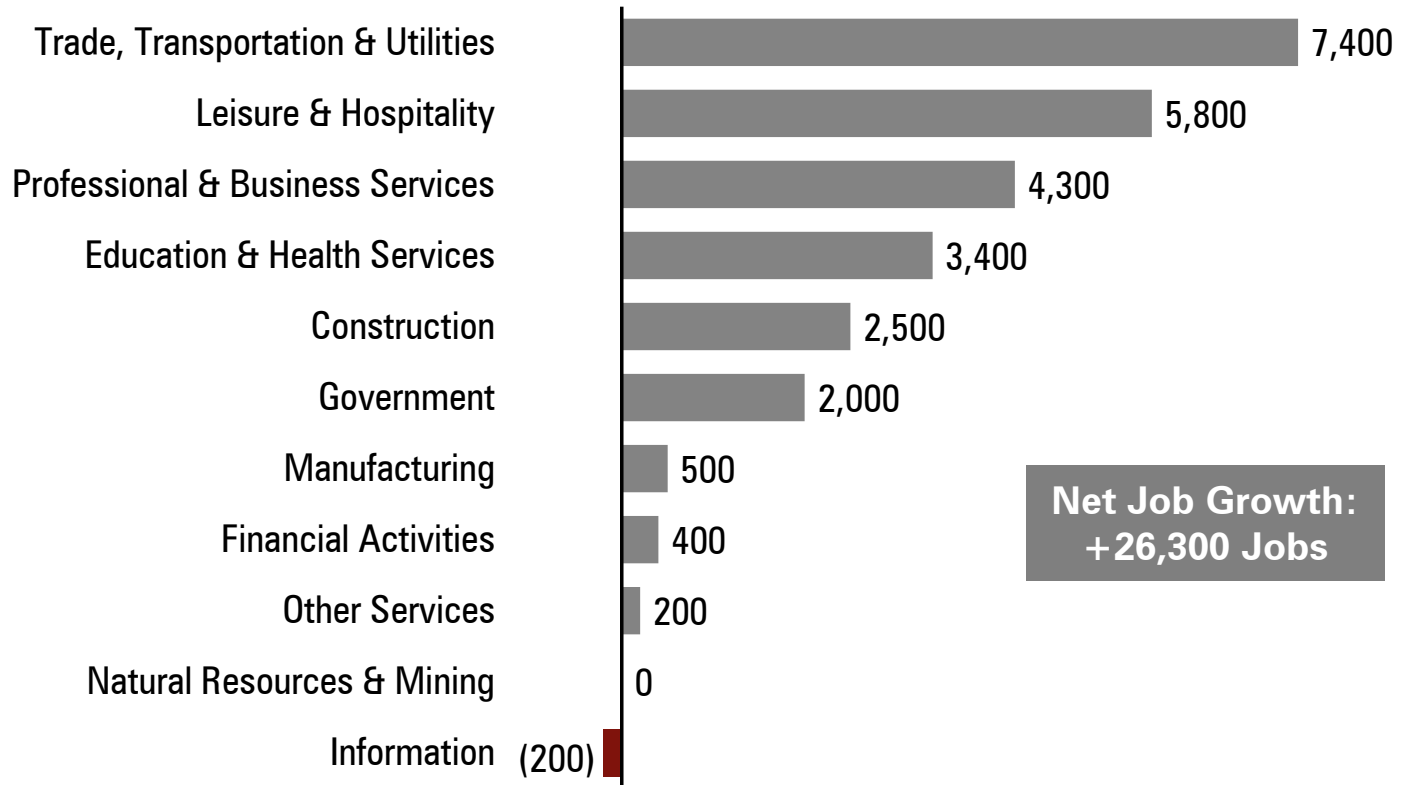
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# Las Vegas MSA Employment Growth Past 12 Months



Source: United States Bureau of Labor Statistics; Nevada Department of Employment, Training and Rehabilitation

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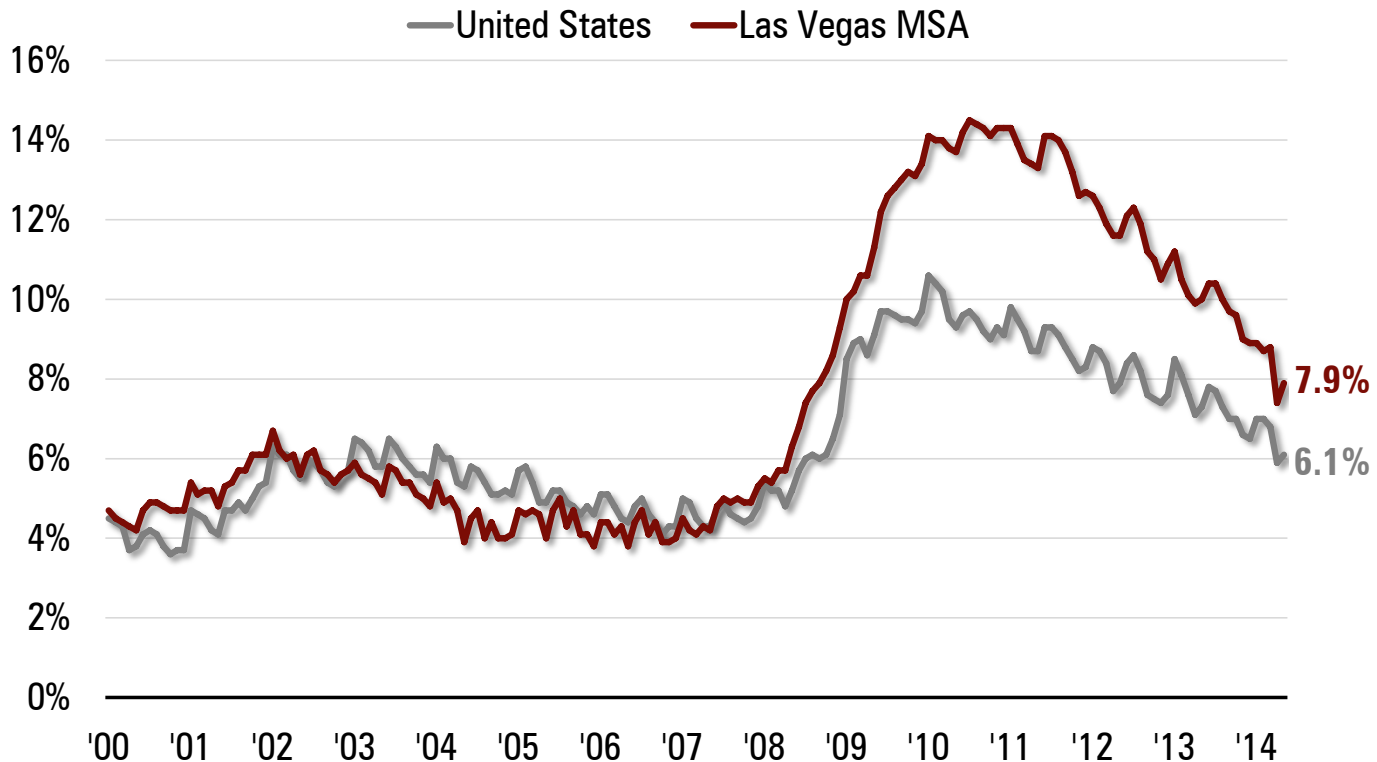
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# Unemployment Rates



Source: United States Bureau of Labor Statistics; Nevada Department of Employment, Training and Rehabilitation

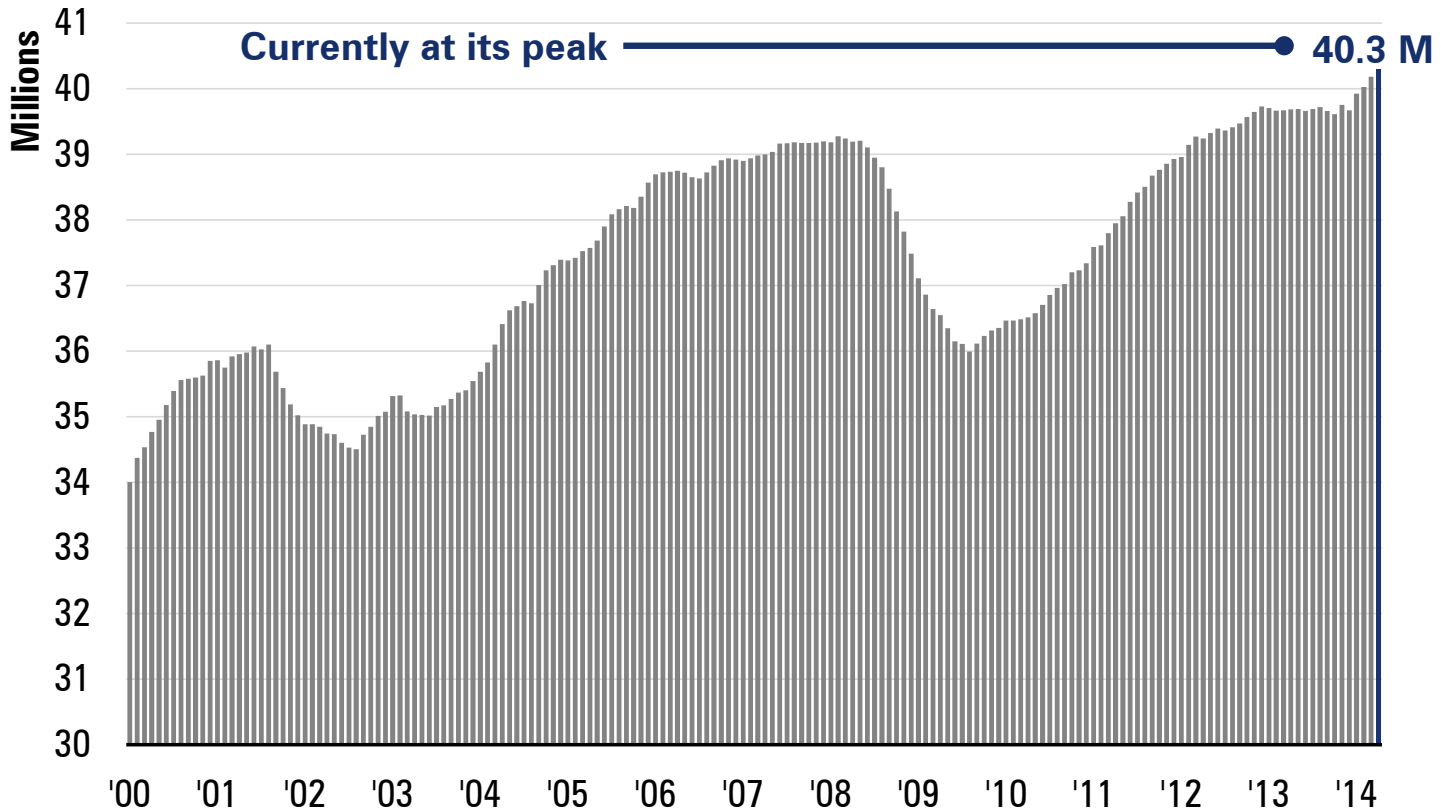
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# Las Vegas Visitor Volume Trailing 12-Month Total



Source: LVCVA

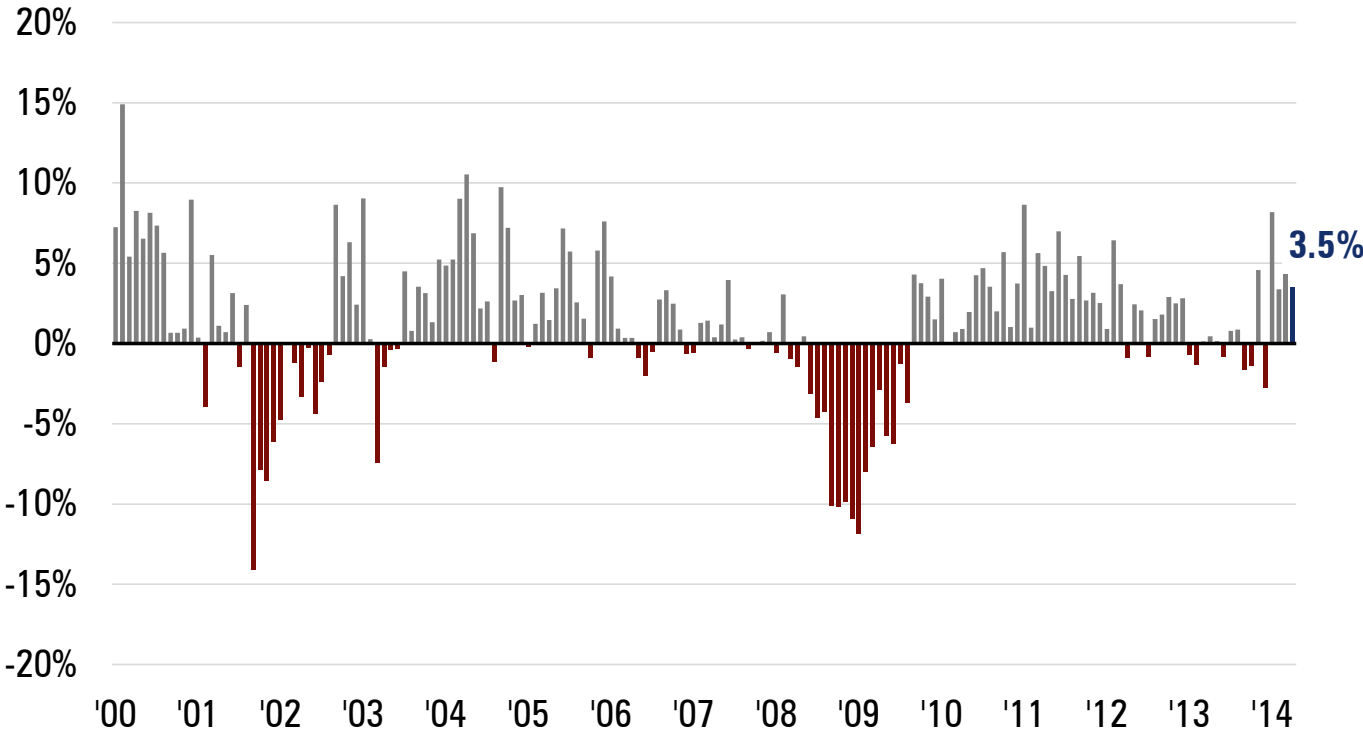
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# Las Vegas Visitor Volume Y-O-Y Growth



Source: LVCVA

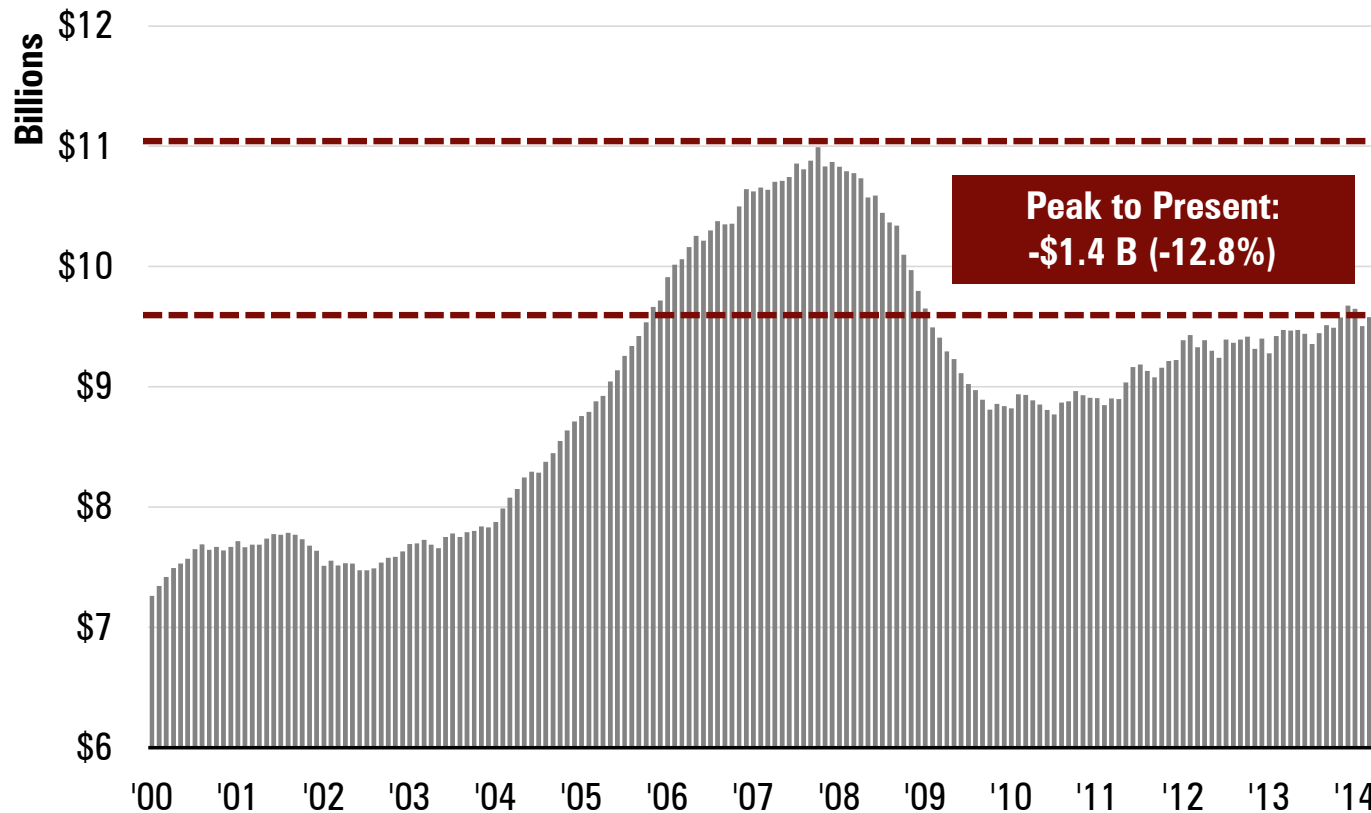


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# Clark County Gross Gaming Revenues

## Trailing 12-Month Total



Source: Nevada Gaming Control Board

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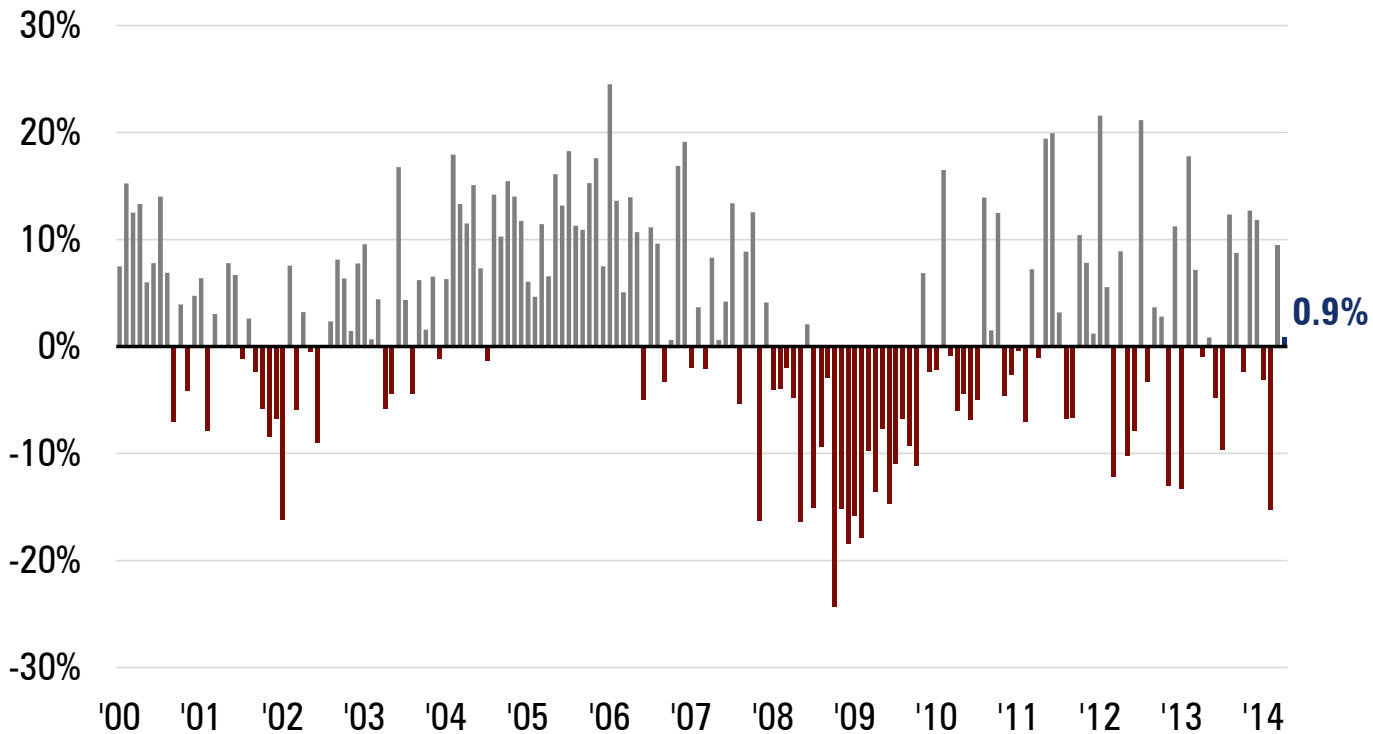
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# Clark County Gross Gaming Revenues

## Y-O-Y Growth



Source: Nevada Gaming Control Board

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# SOUTHERN NEVADA COMMERCIAL REAL ESTATE MARKET

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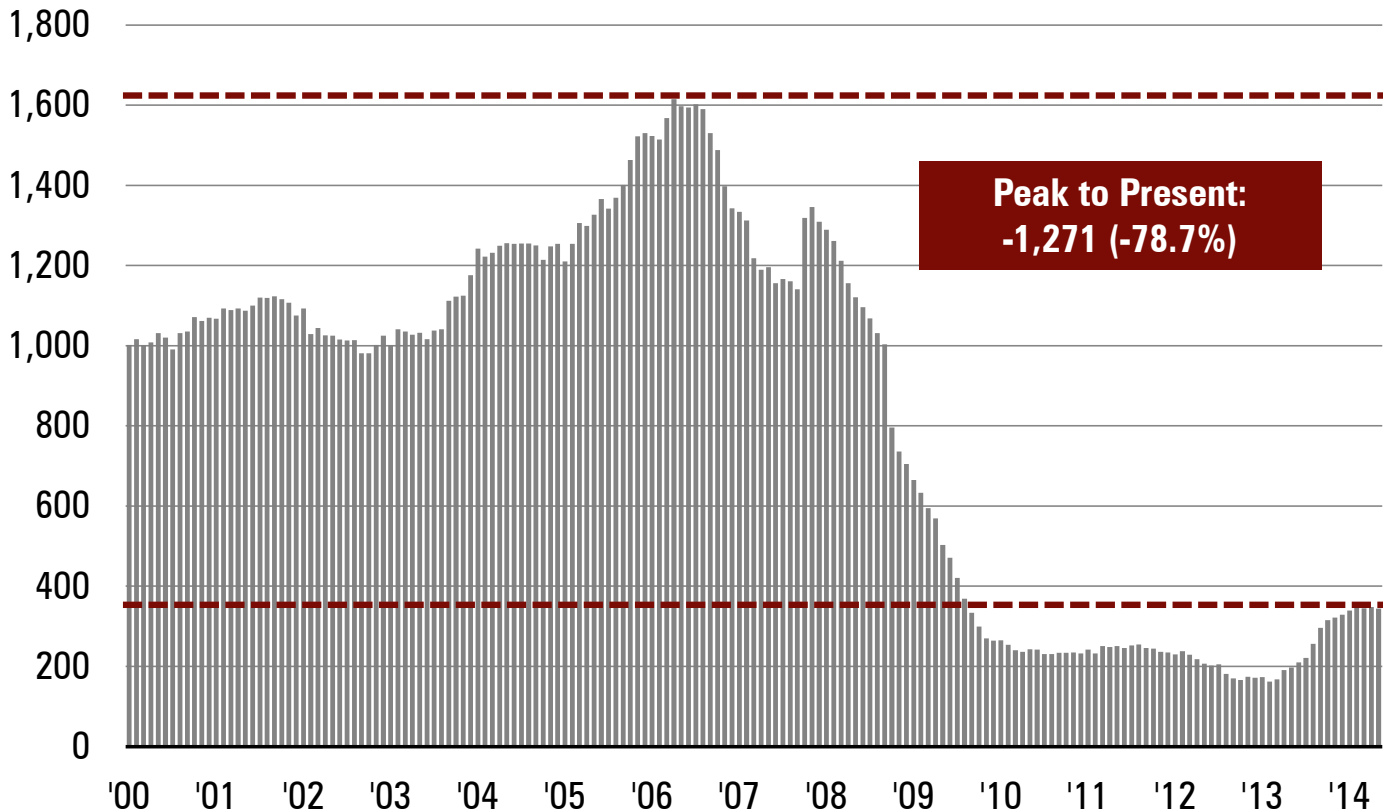


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# Clark County Commercial Buildings Permitted

## Trailing 12-Month Total



Source: UNLV Center for Business & Economic Research

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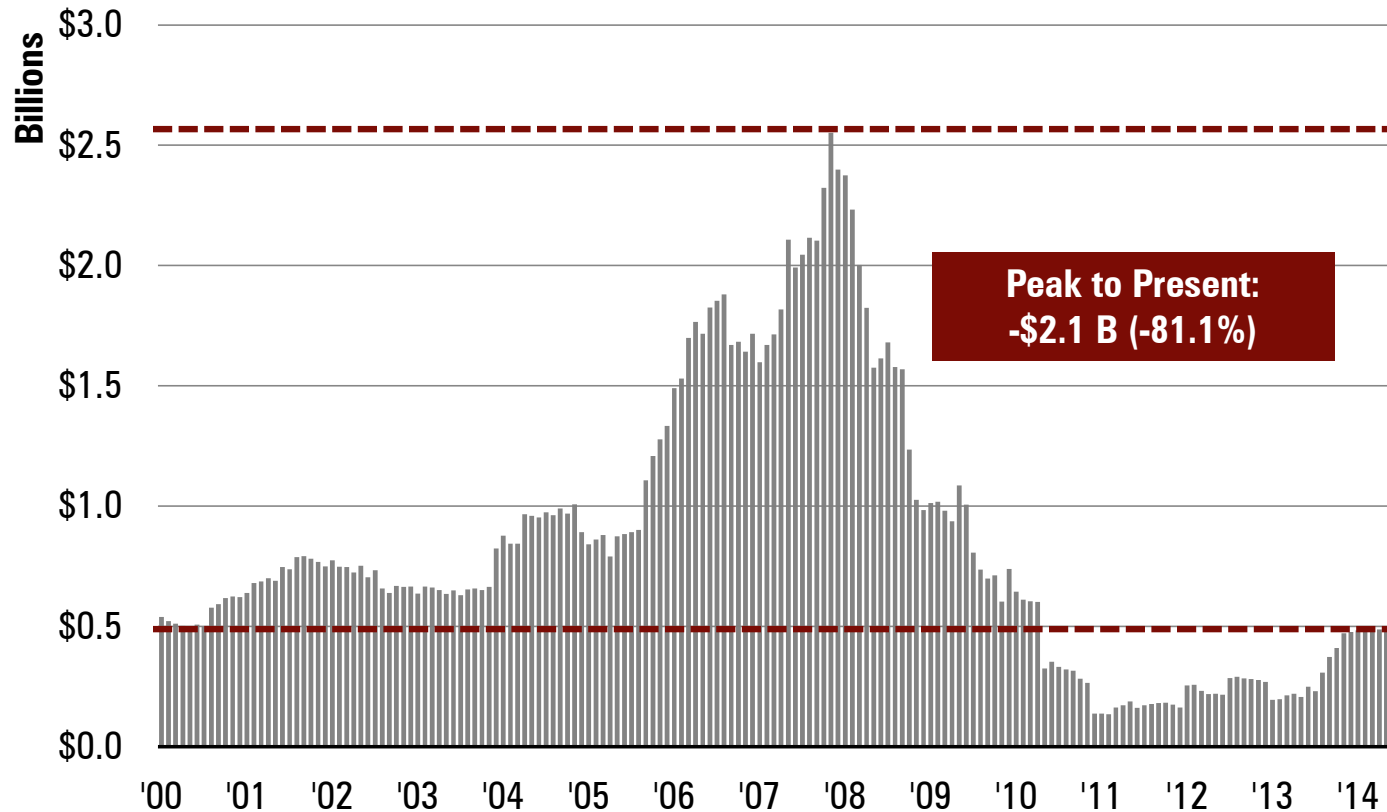
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# Clark County Commercial Value Permitted Trailing 12-Month Total



Source: UNLV Center for Business & Economic Research

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# SOUTHERN NEVADA OFFICE MARKET

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# Southern Nevada Office Market Overview

	<b>Q1 2014</b>	<b>Q4 2013</b>	<b>Q1 2013</b>
Inventory (SF)	52.8 M	52.8 M	52.7 M
Vacancy	25.8%	25.5%	26.2%
Lease Rates (PSF)	\$1.87	\$1.86	\$1.87
Net Absorption (SF)	-145,440	+122,548	-241,348
Completed (SF)	46,000	45,660	35,000
Under Construction (SF)	747,000	443,000	175,000

Source: Applied Analysis

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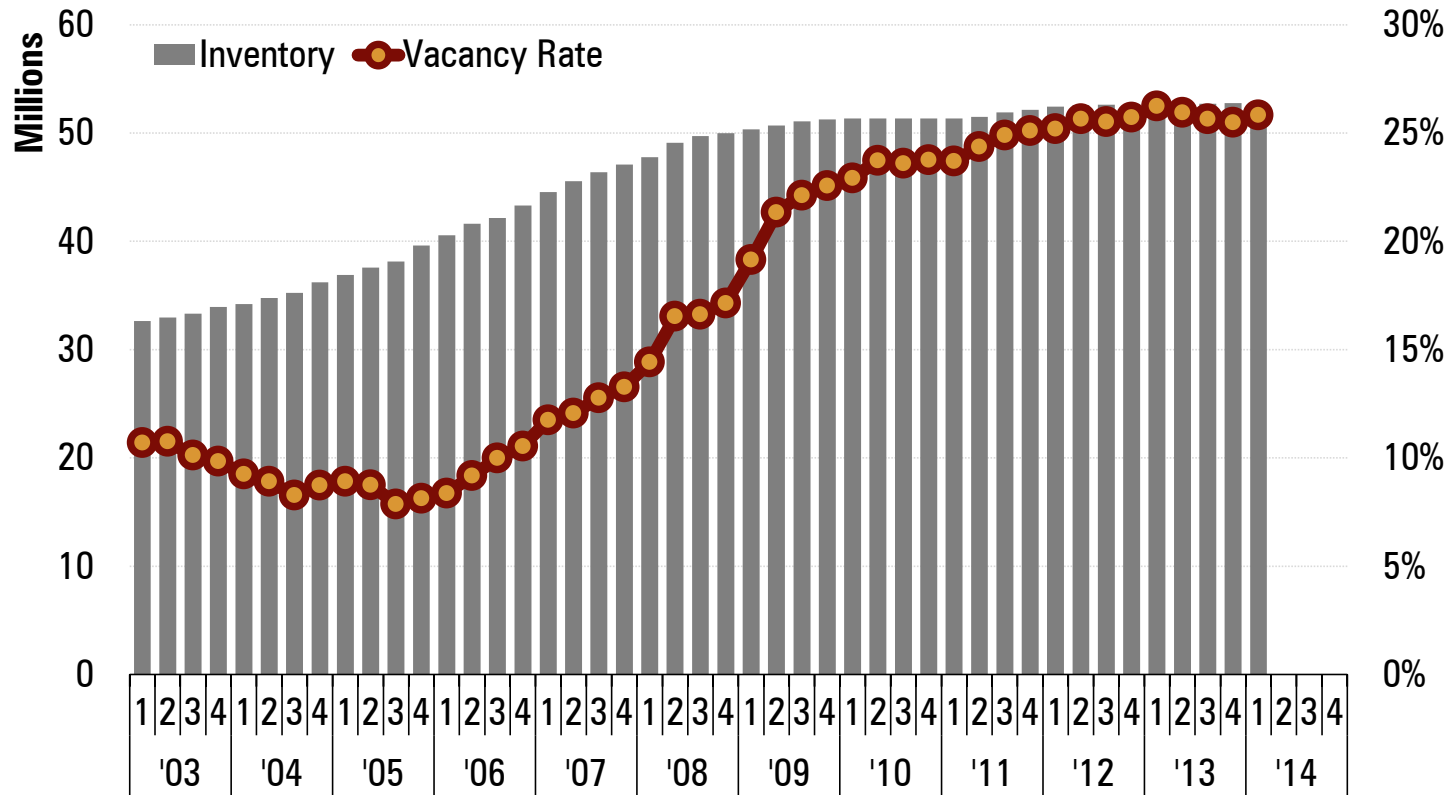
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# Southern Nevada Office Market Inventory (in SF) and Vacancy Rates



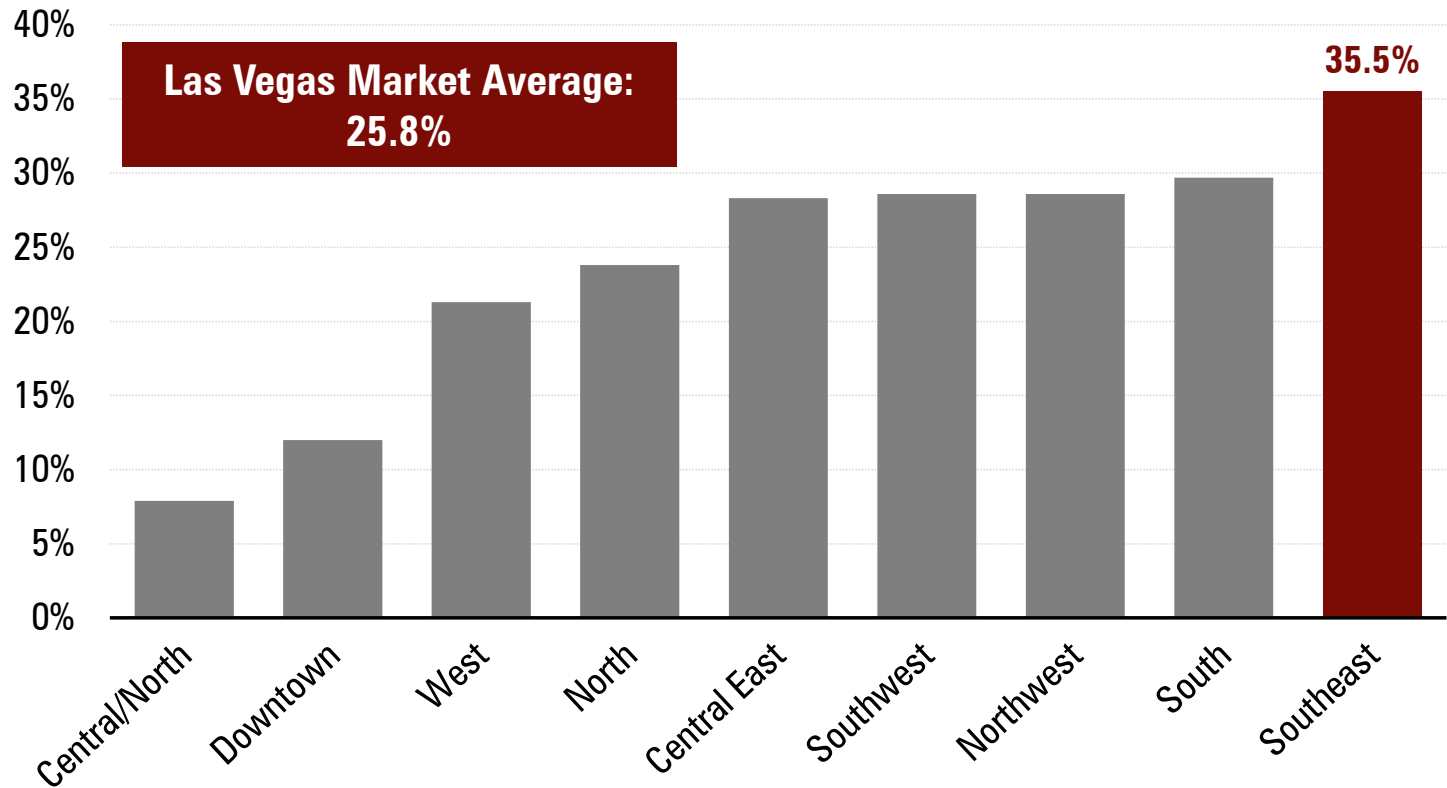
Source: Applied Analysis



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# Southern Nevada Office Market Vacancy Rates by Submarket | Q1 2014



Source: Applied Analysis

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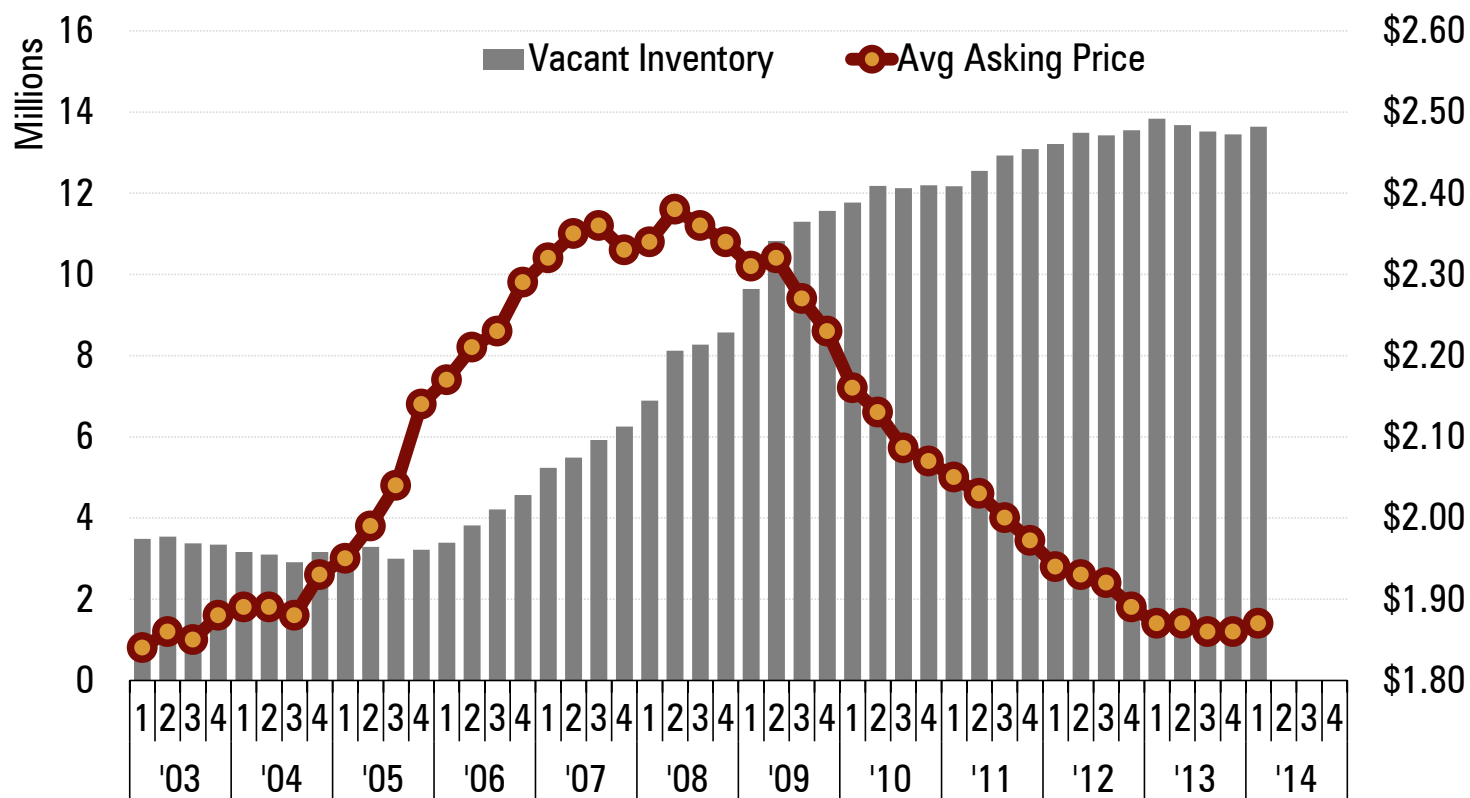
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# Southern Nevada Office Market

## Vacant Inventory (in SF) and Average Asking Rates



Source: Applied Analysis

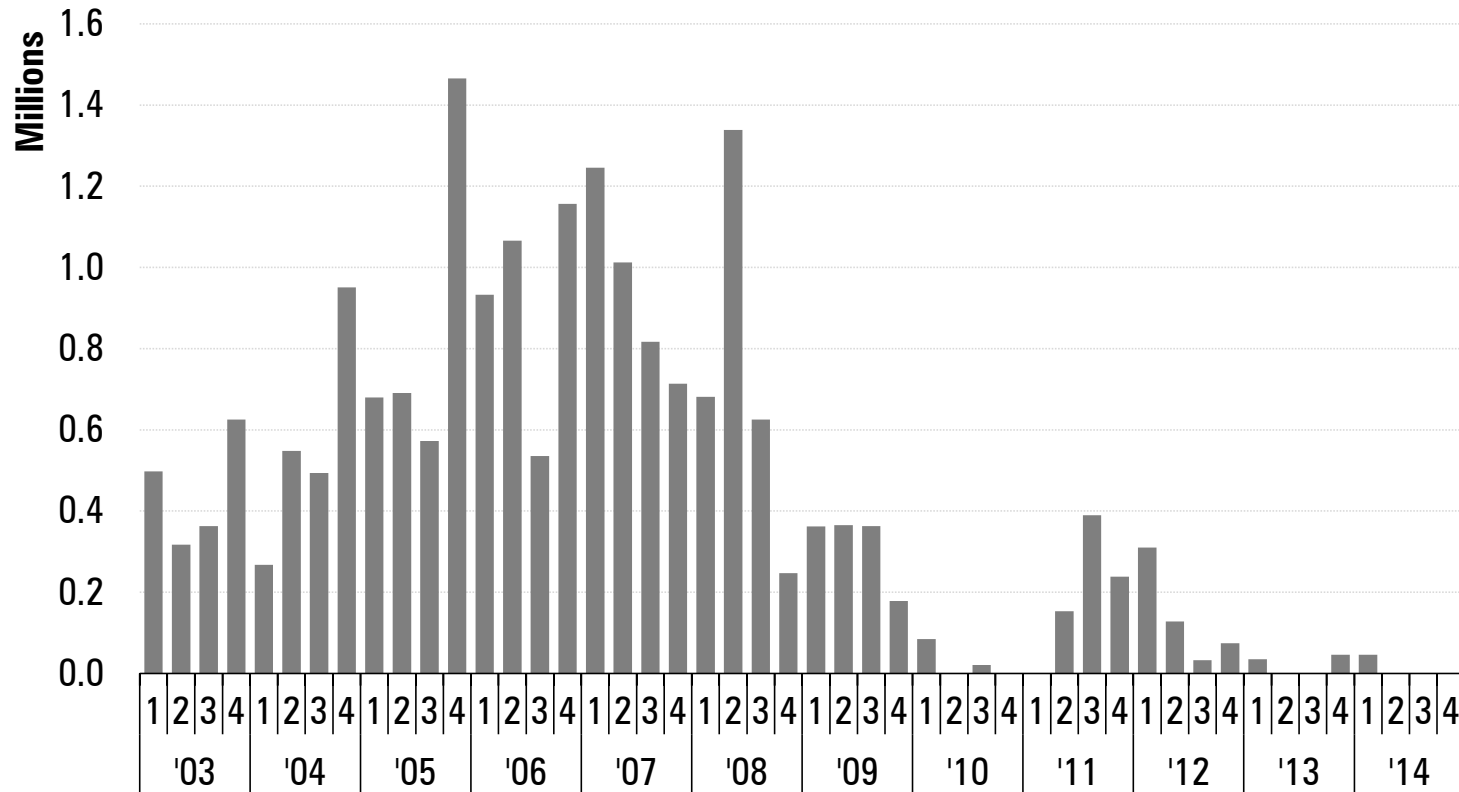


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# Southern Nevada Office Market

## New Completions (in SF)



Source: Applied Analysis

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# Robert T. Eglet Advocacy Center (EVAPs Law Office) 46,000 SF

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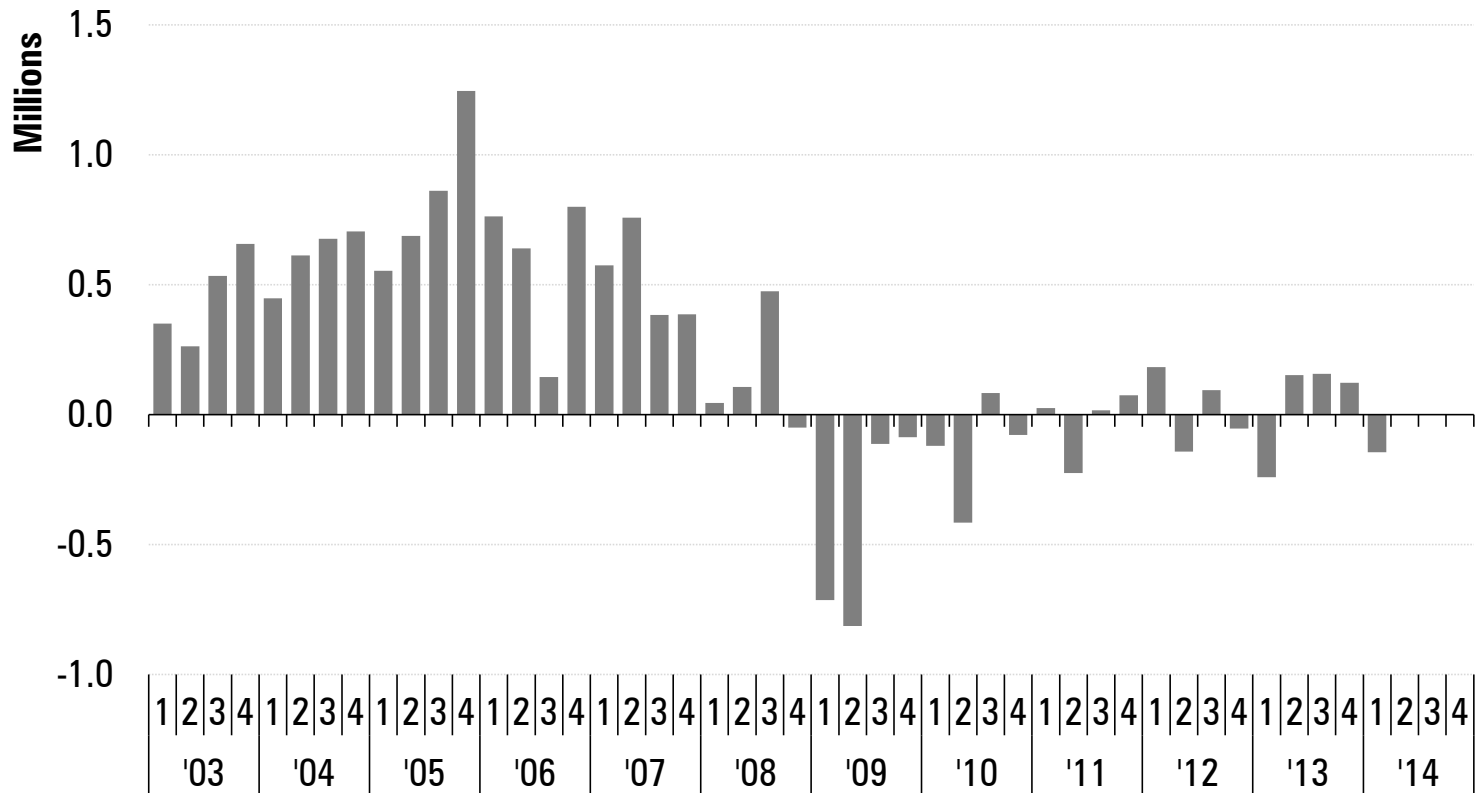
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# Southern Nevada Office Market

## Net Absorption (in SF)



Source: Applied Analysis



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**Las Vegas Urban League**  
*A Nevada Community Action Agency*



# Las Vegas Urban League

## 18,100 SF

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# Resort Com 6,800 SF

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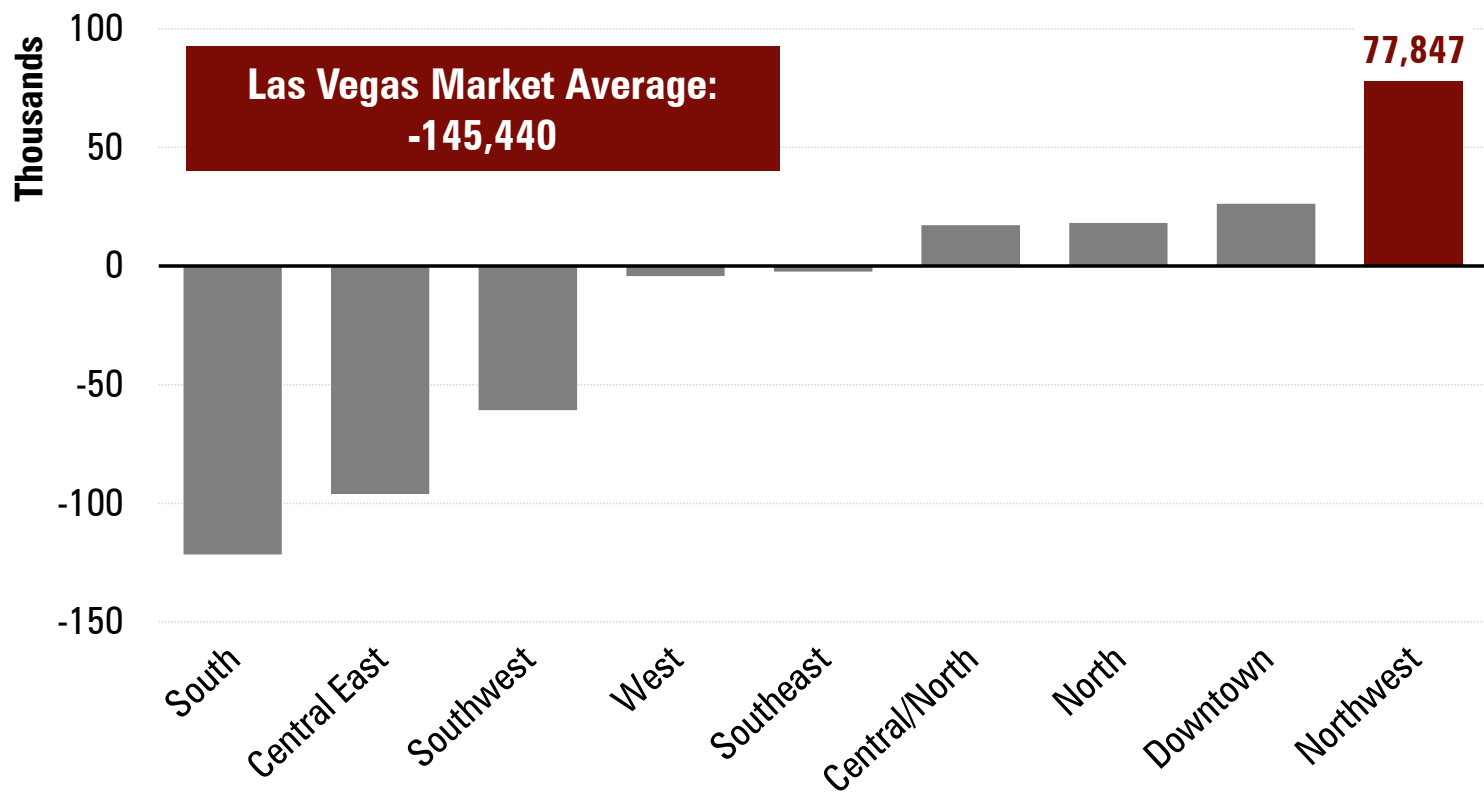


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# Southern Nevada Office Market

## Net Absorption by Submarket | Q1 2014



Source: Applied Analysis

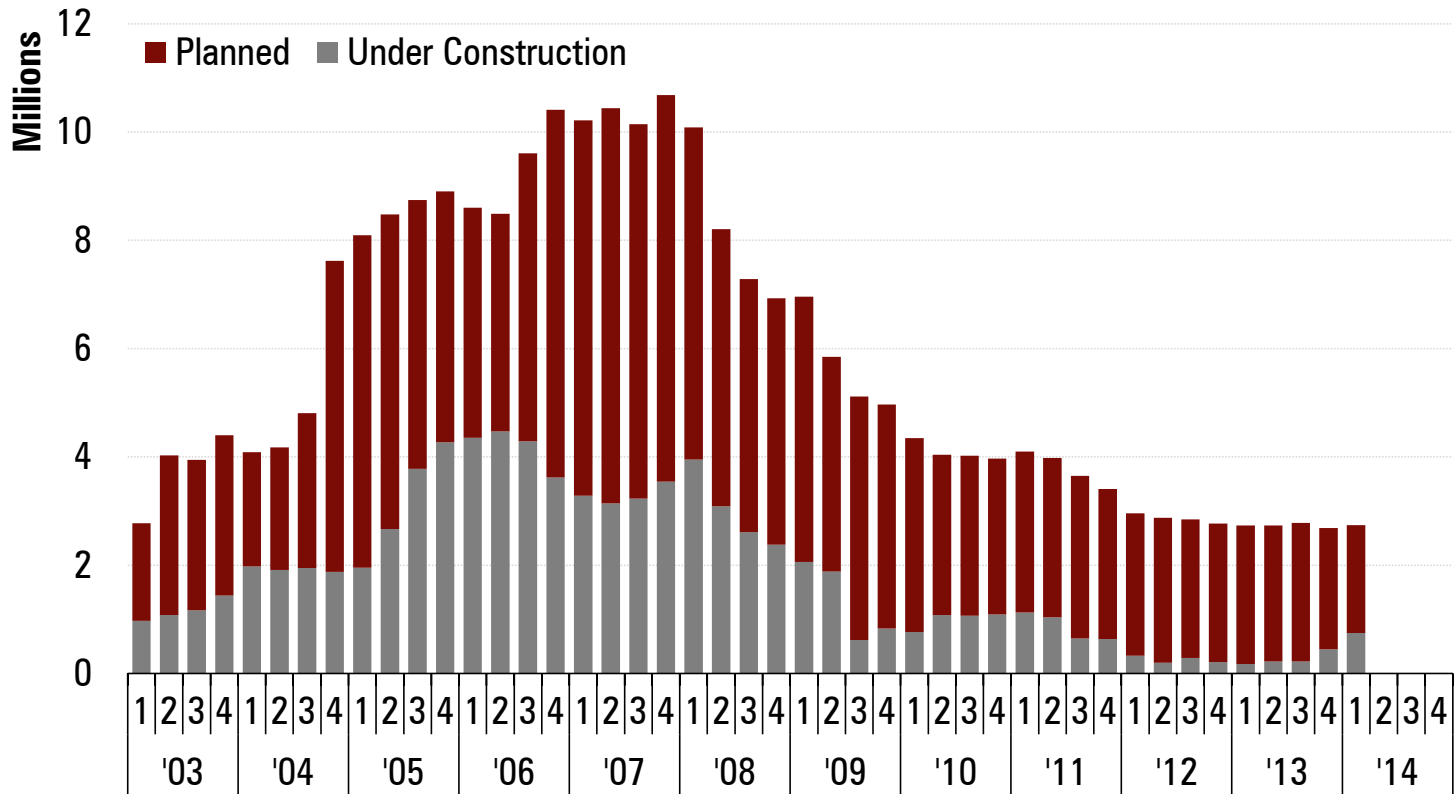
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# Southern Nevada Office Market Planned and Under Construction (in SF)



Source: Applied Analysis



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# **Shops at Summerlin 200,000 SF**

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# The Gramercy

## 200,000 SF

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# Federal Justice Tower 129,000 SF



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# Centennial Hills Center 150,000 SF

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# Tivoli Village Phase II 68,000 SF



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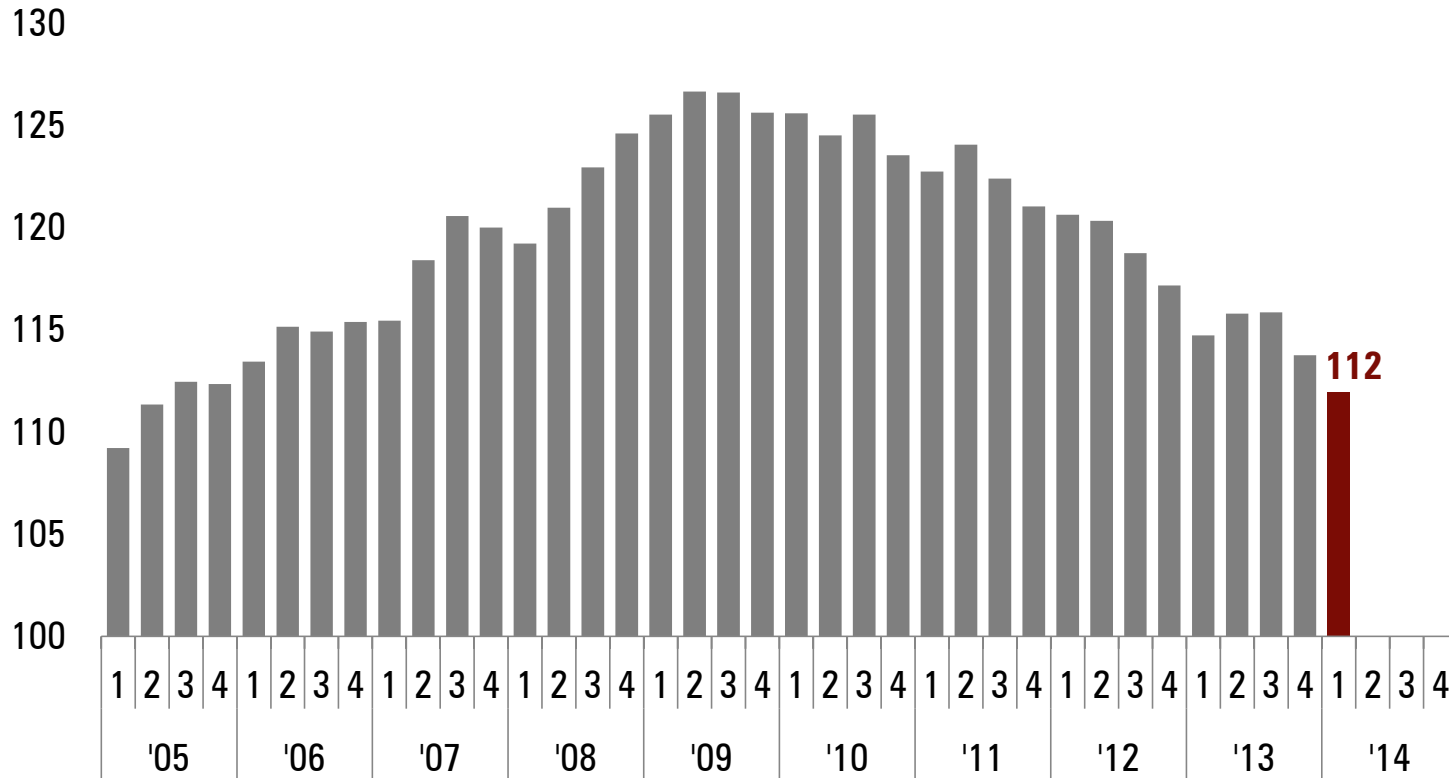
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# Office Market | Occupied Space (SF) per Office-Using Employee



Source: Applied Analysis, Nevada Department of Employment, Training & Rehabilitation



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# SOUTHERN NEVADA INDUSTRIAL MARKET

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# Southern Nevada Industrial Market Overview

	<b>Q1 2014</b>	<b>Q4 2013</b>	<b>Q1 2013</b>
Inventory (SF)	107.8 M	107.4 M	106.6 M
Vacancy	12.2%	13.0%	15.0%
Lease Rates (PSF)	\$0.54	\$0.54	\$0.51
Net Absorption (SF)	+1,265,515	+497,916	+1,175,631
Completed (SF)	431,628	0	160,000
Under Construction (SF)	1,301,285	1,207,913	844,149

Source: Applied Analysis

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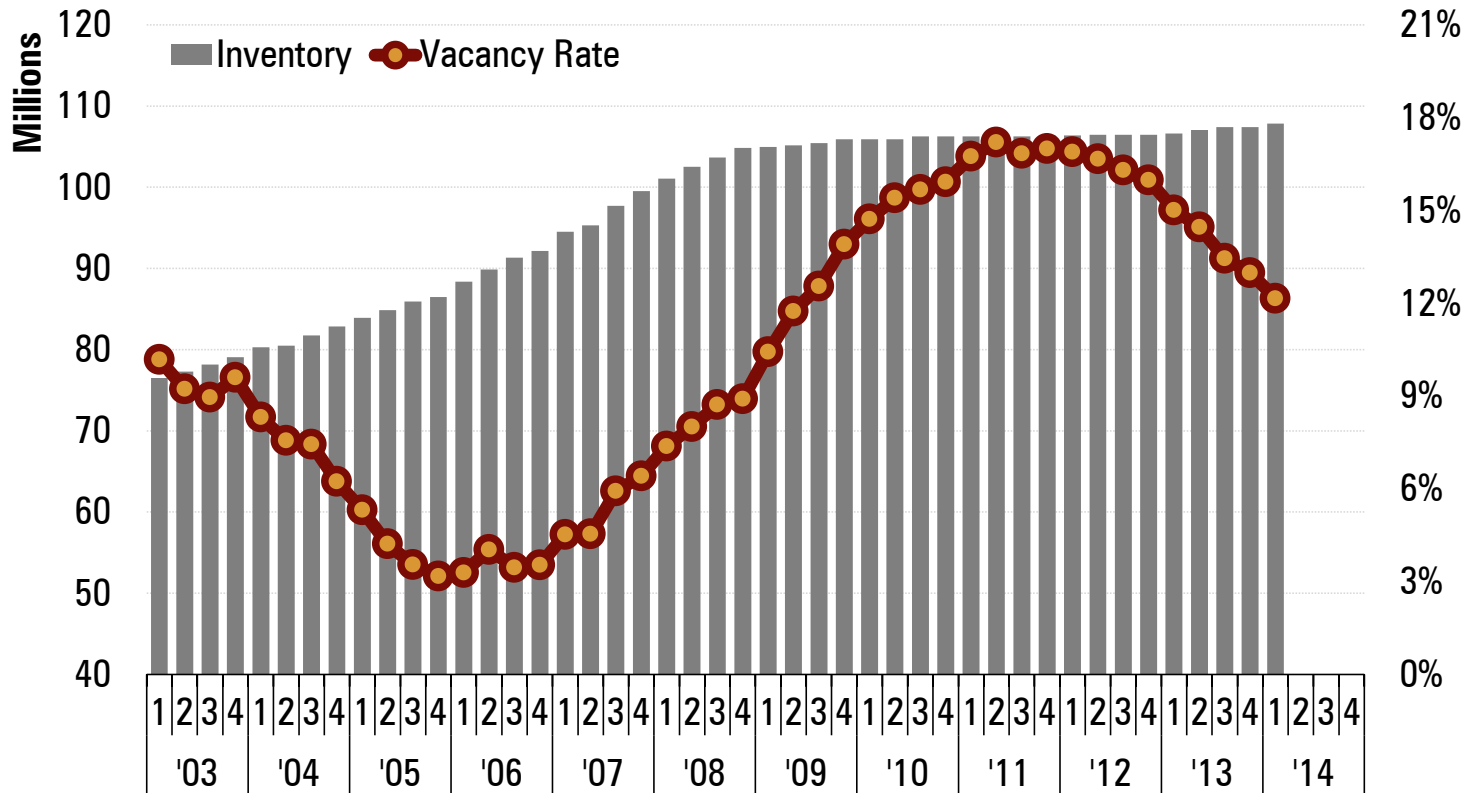


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# Southern Nevada Industrial Market

## Inventory (in SF) and Vacancy Rates



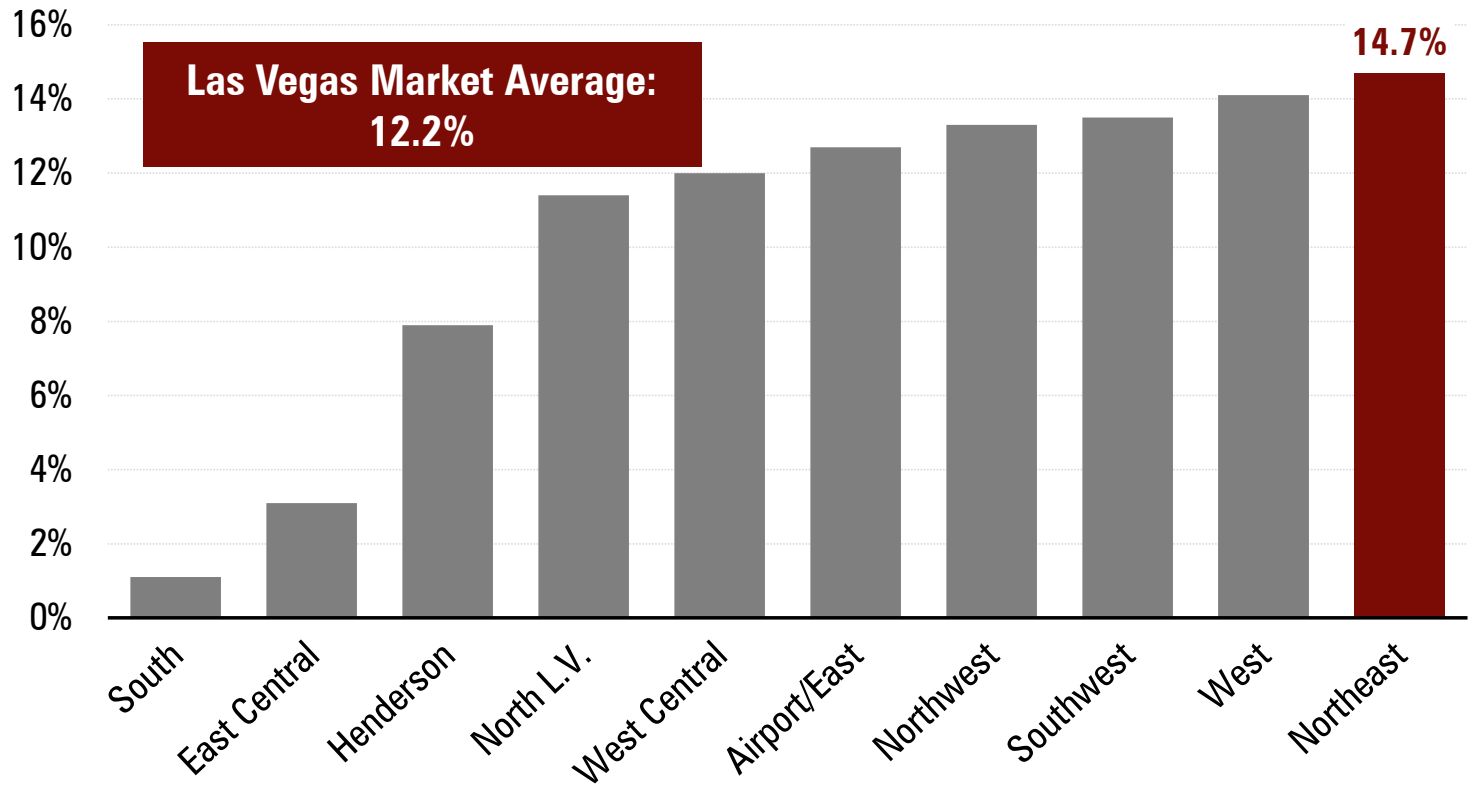
Source: Applied Analysis



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# Southern Nevada Industrial Market Vacancy Rates by Submarket | Q1 2014



Source: Applied Analysis

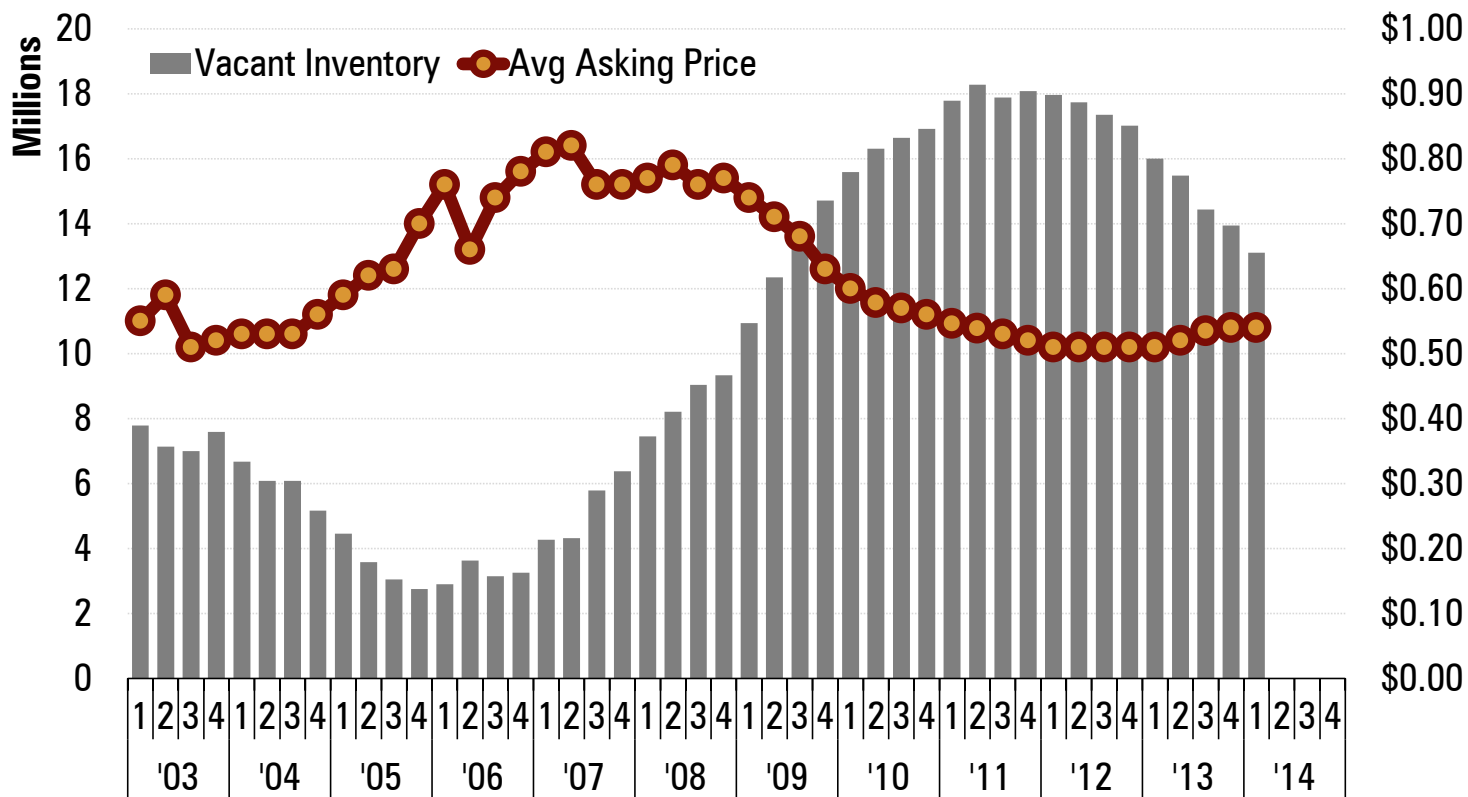


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# Southern Nevada Industrial Market

## Vacant Inventory (in SF) and Average Asking Rates



Source: Applied Analysis



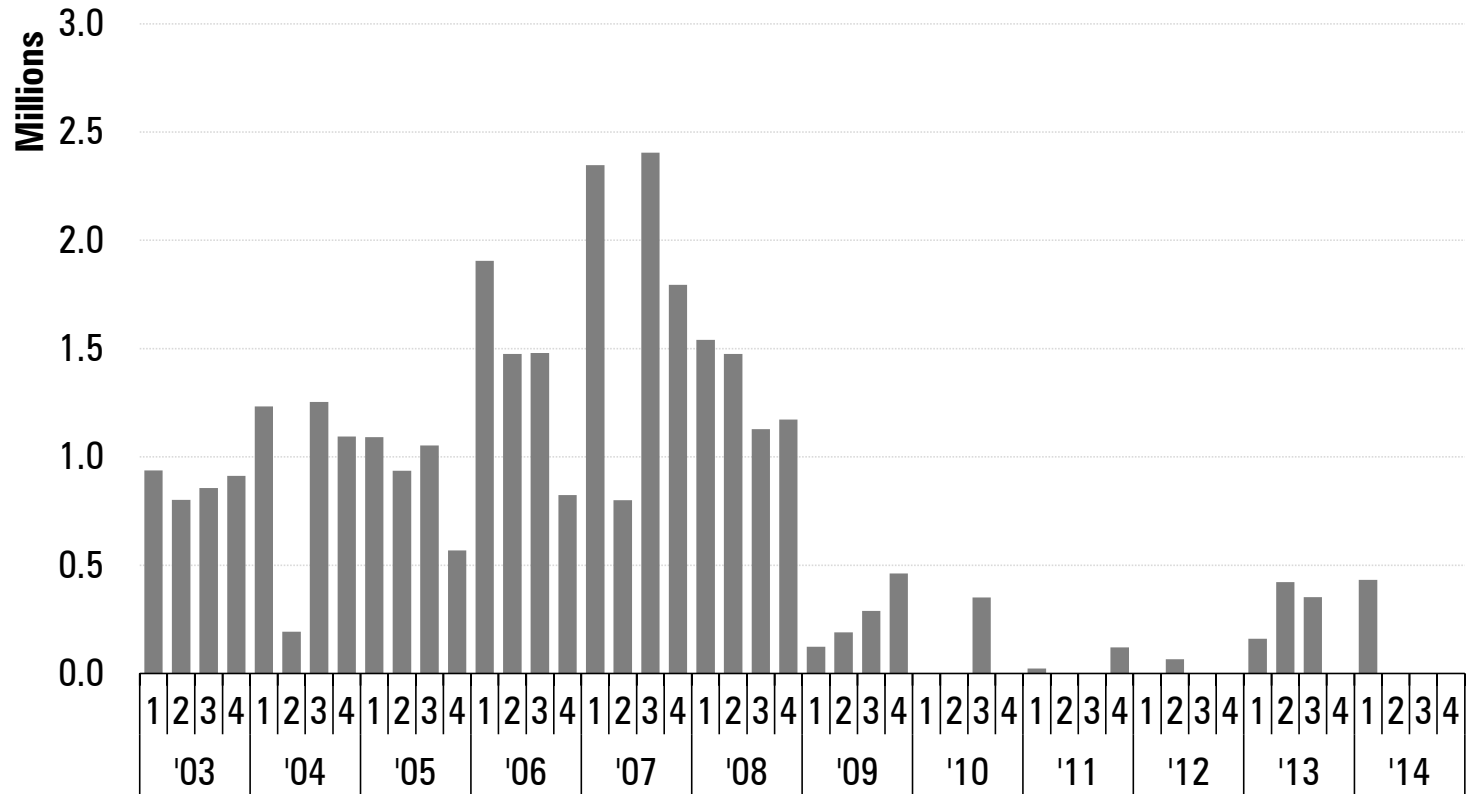
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# Southern Nevada Industrial Market

## New Completions (in SF)



Source: Applied Analysis



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# VadaTech 70,000 SF

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# FedEx (South 15 Airport Center) 296,000 SF

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# Shetakis Wholesalers Expansion 65,600 SF



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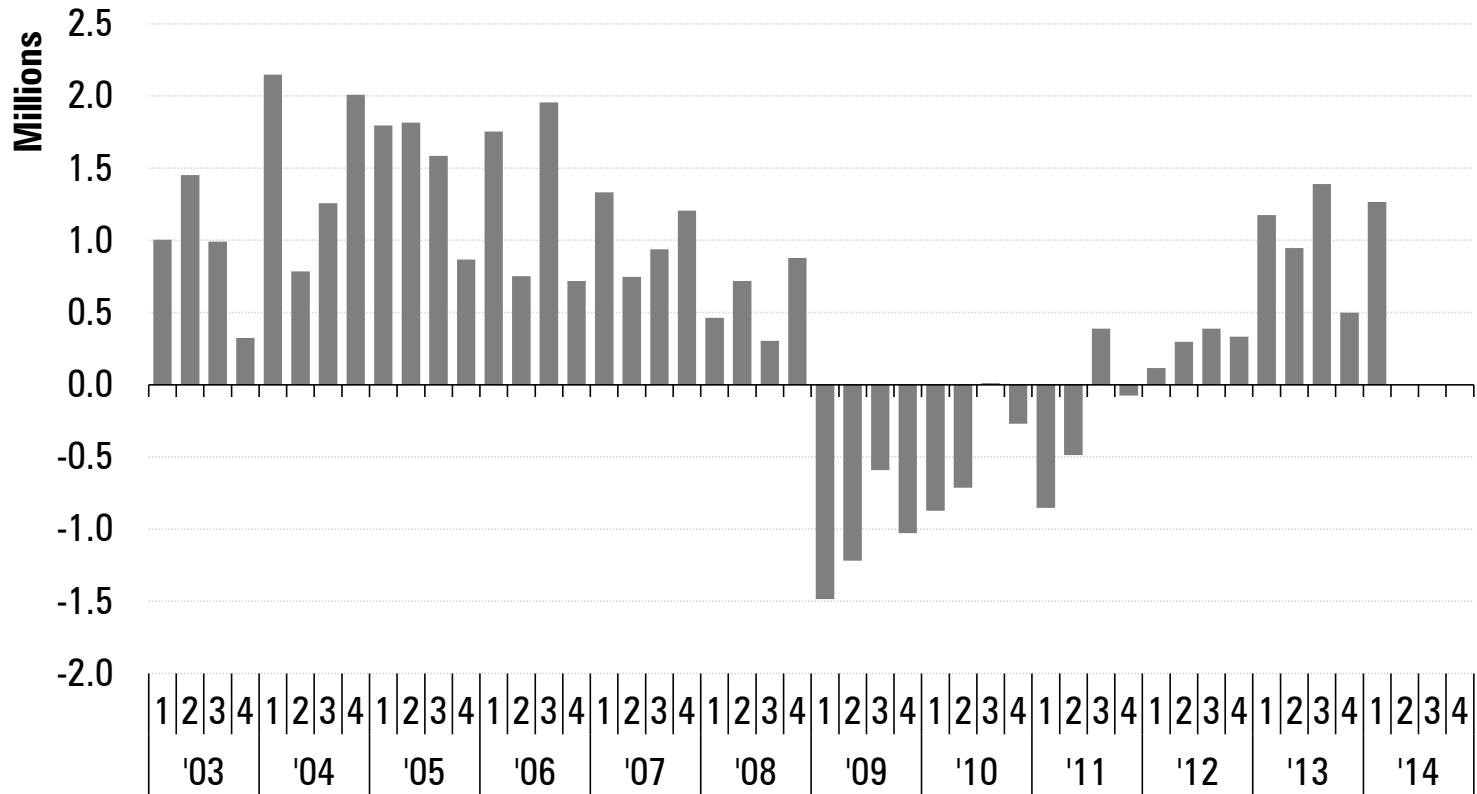
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# Southern Nevada Industrial Market

## Net Absorption (in SF)



Source: Applied Analysis



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# RW García™

**RW Garcia**  
**63,000 SF**

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# Tait Tower Manufacturing

## 34,000 SF

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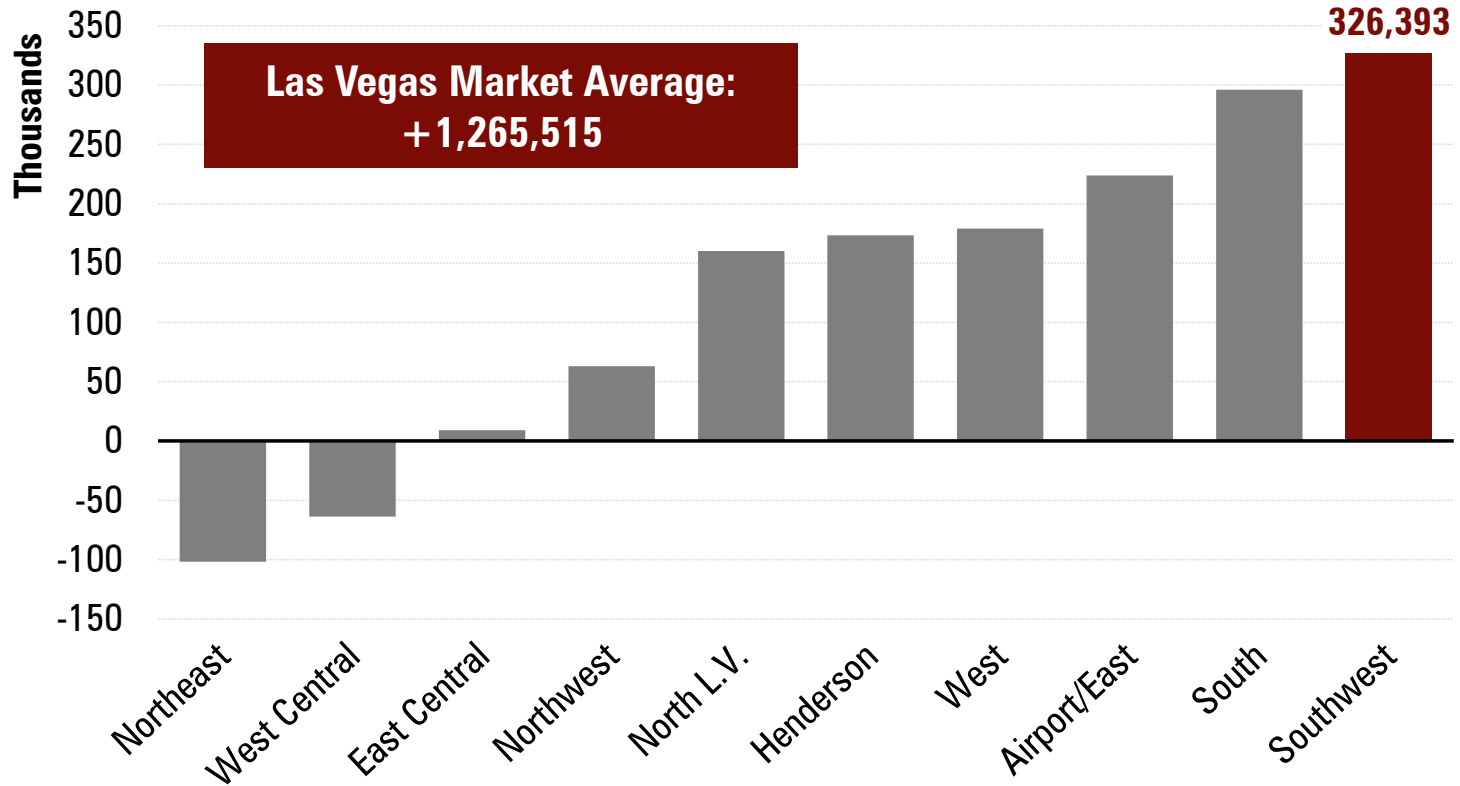


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# Southern Nevada Industrial Market

## Net Absorption by Submarket | Q1 2014



Source: Applied Analysis

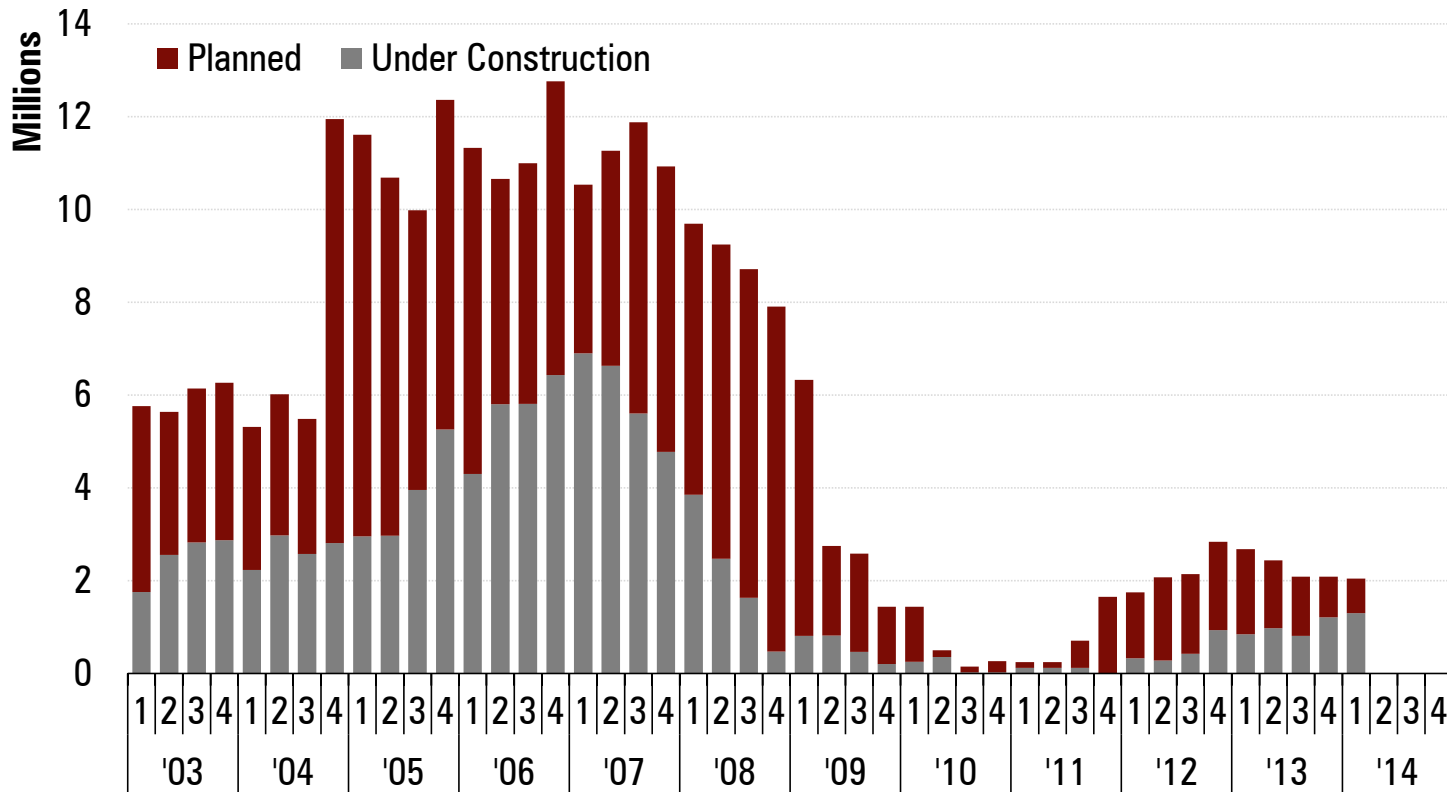


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# Southern Nevada Industrial Market Planned and Under Construction (in SF)



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# Nicholas & Company

## 182,900 SF

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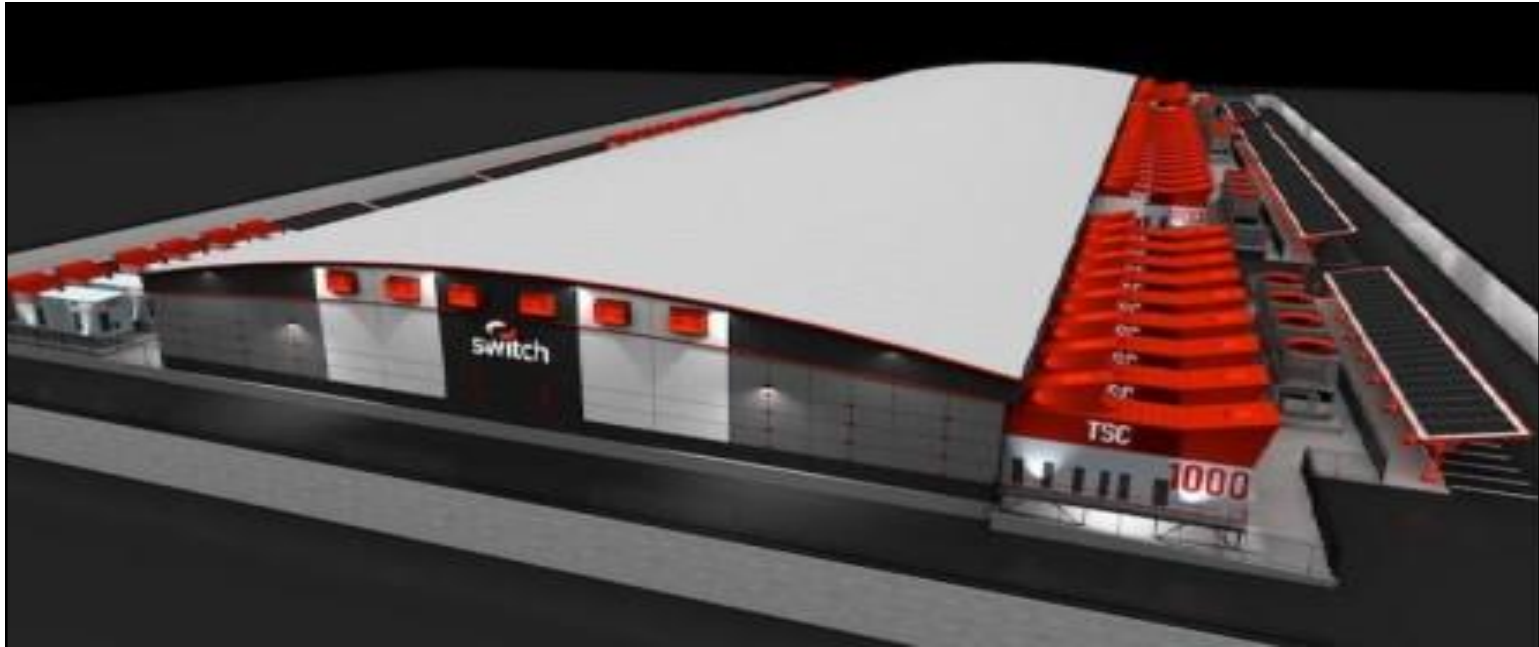


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# Switch MegaNAP 9

## 525,000 SF

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# Konami Gaming Expansion 193,400 SF

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# TJ Maxx Distribution Center Expansion 400,000 SF



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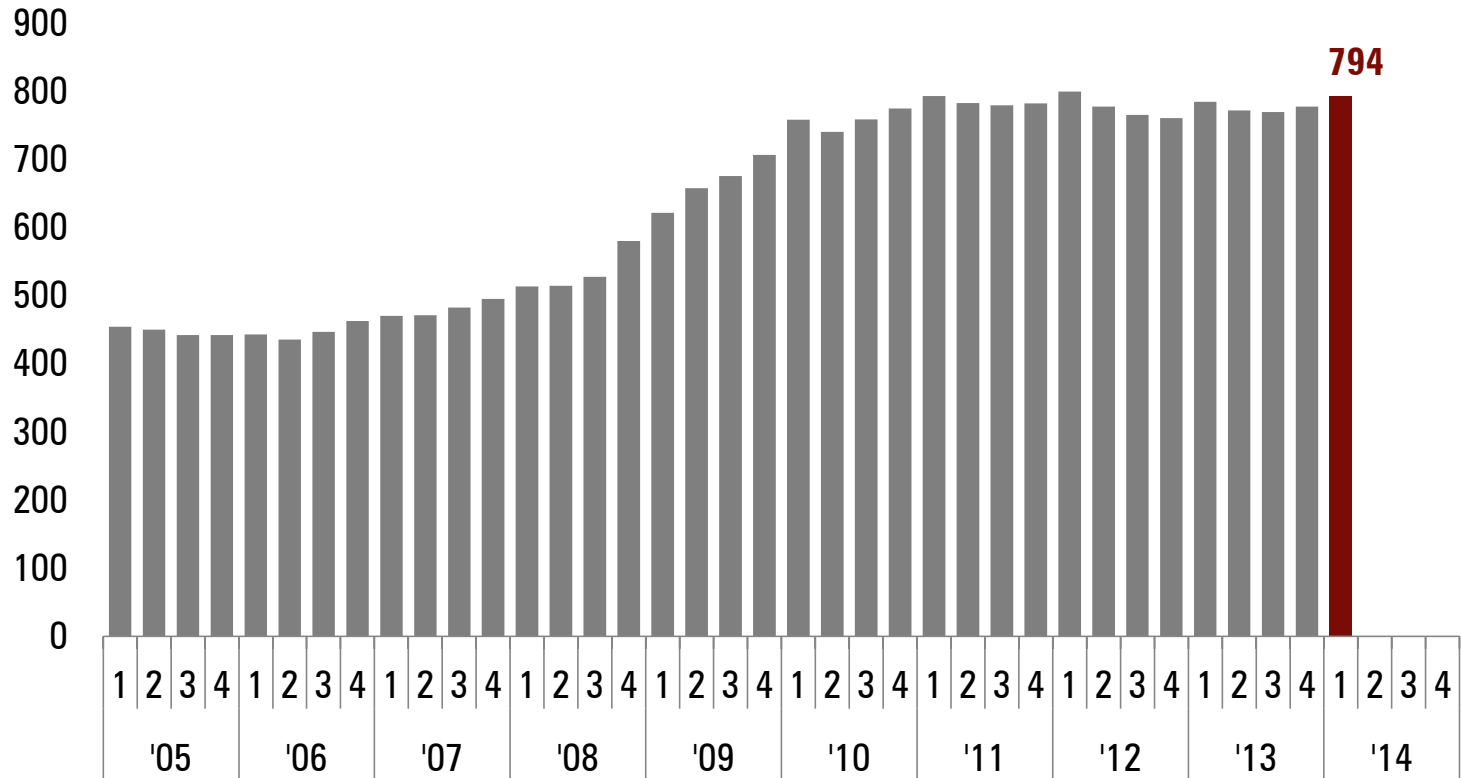
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# Industrial Market | Occupied Space (SF) per Industrial-Using Employee



Source: Applied Analysis, Nevada Department of Employment, Training & Rehabilitation



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# SOUTHERN NEVADA RETAIL MARKET

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# Southern Nevada Retail Market Overview

	Q1 2014	Q4 2013	Q1 2013
Inventory (SF)	52.0 M	52.0 M	52.0 M
Vacancy	9.0%	9.1%	10.1%
Lease Rates (PSF)	\$1.48	\$1.49	\$1.49
Net Absorption (SF)	+103,993	+111,198	-75,295
Completed (SF)	16,000	12,928	9,100
Under Construction (SF)	2,112,750	2,041,000	333,531

Source: Applied Analysis

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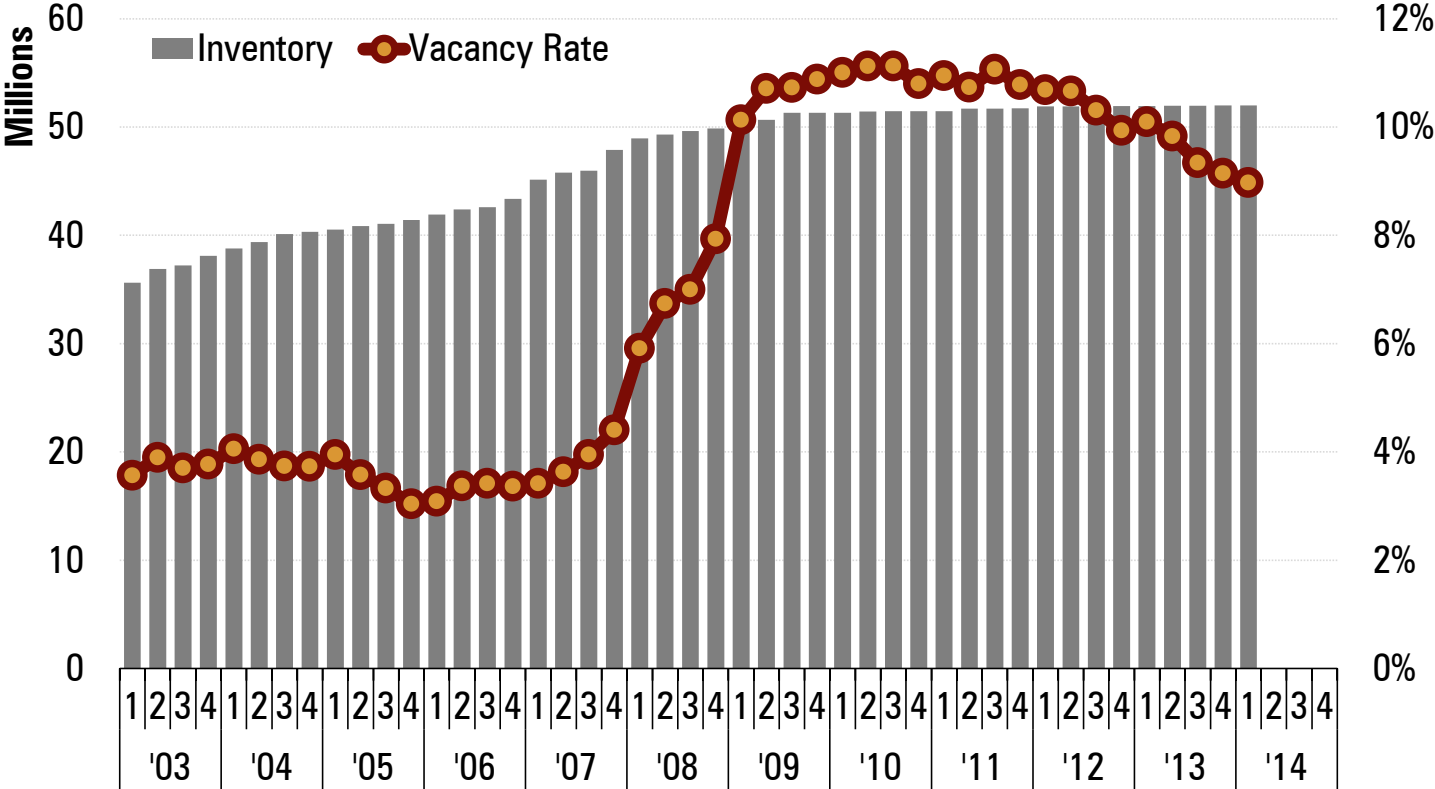


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# Southern Nevada Retail Market Inventory (in SF) and Vacancy Rates



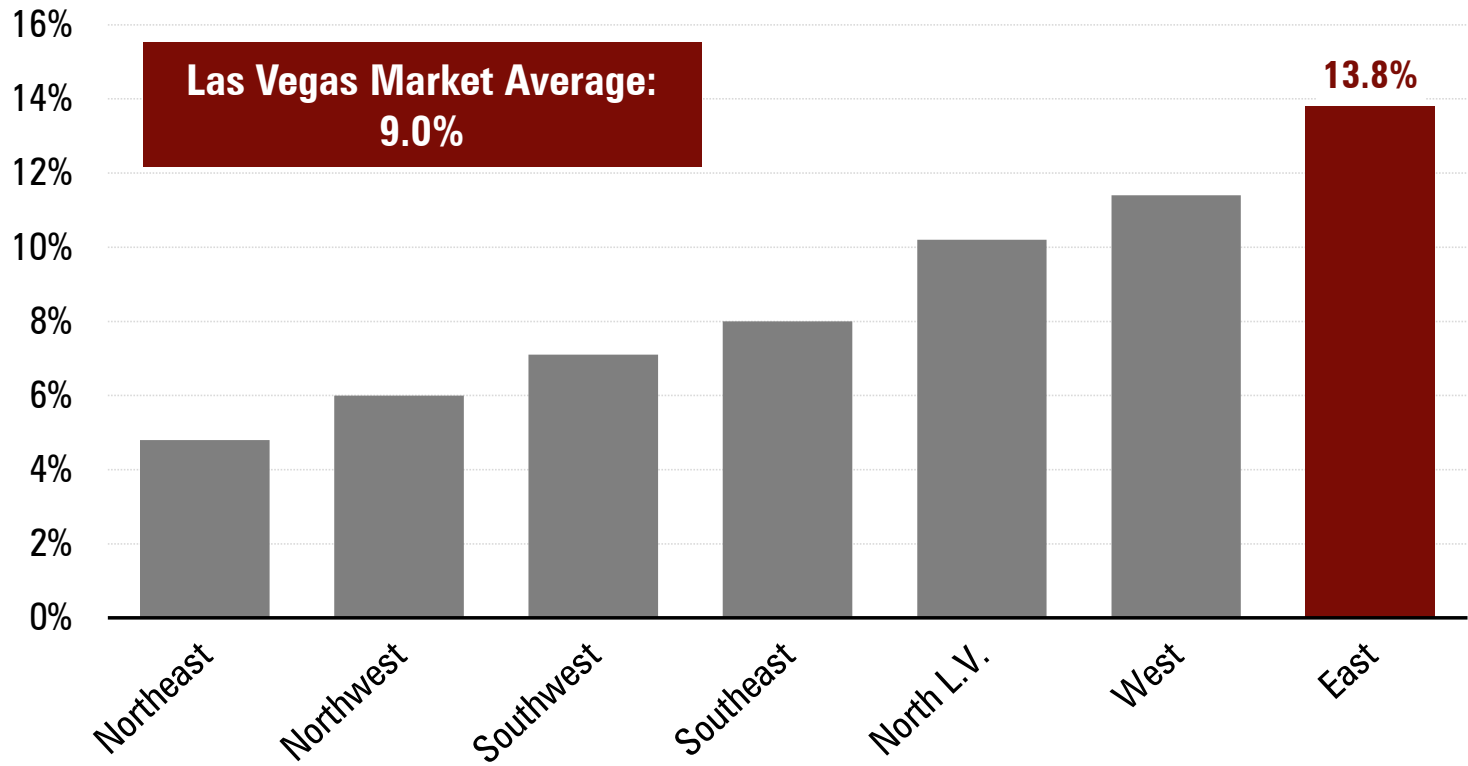
Source: Applied Analysis



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# Southern Nevada Retail Market Vacancy Rates by Submarket | Q1 2014



Source: Applied Analysis

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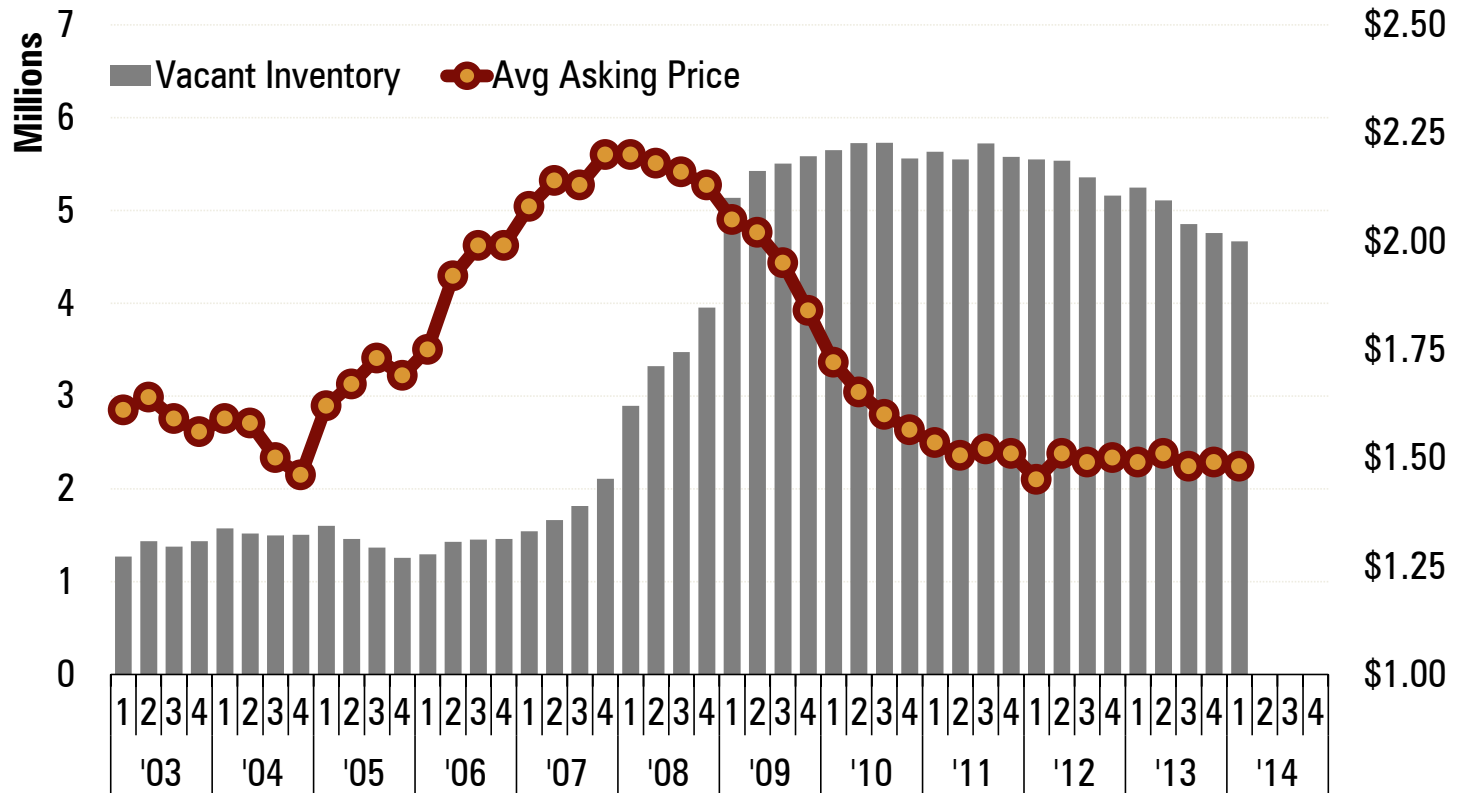
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# Southern Nevada Retail Market

## Vacant Inventory (in SF) and Average Asking Rates



Source: Applied Analysis

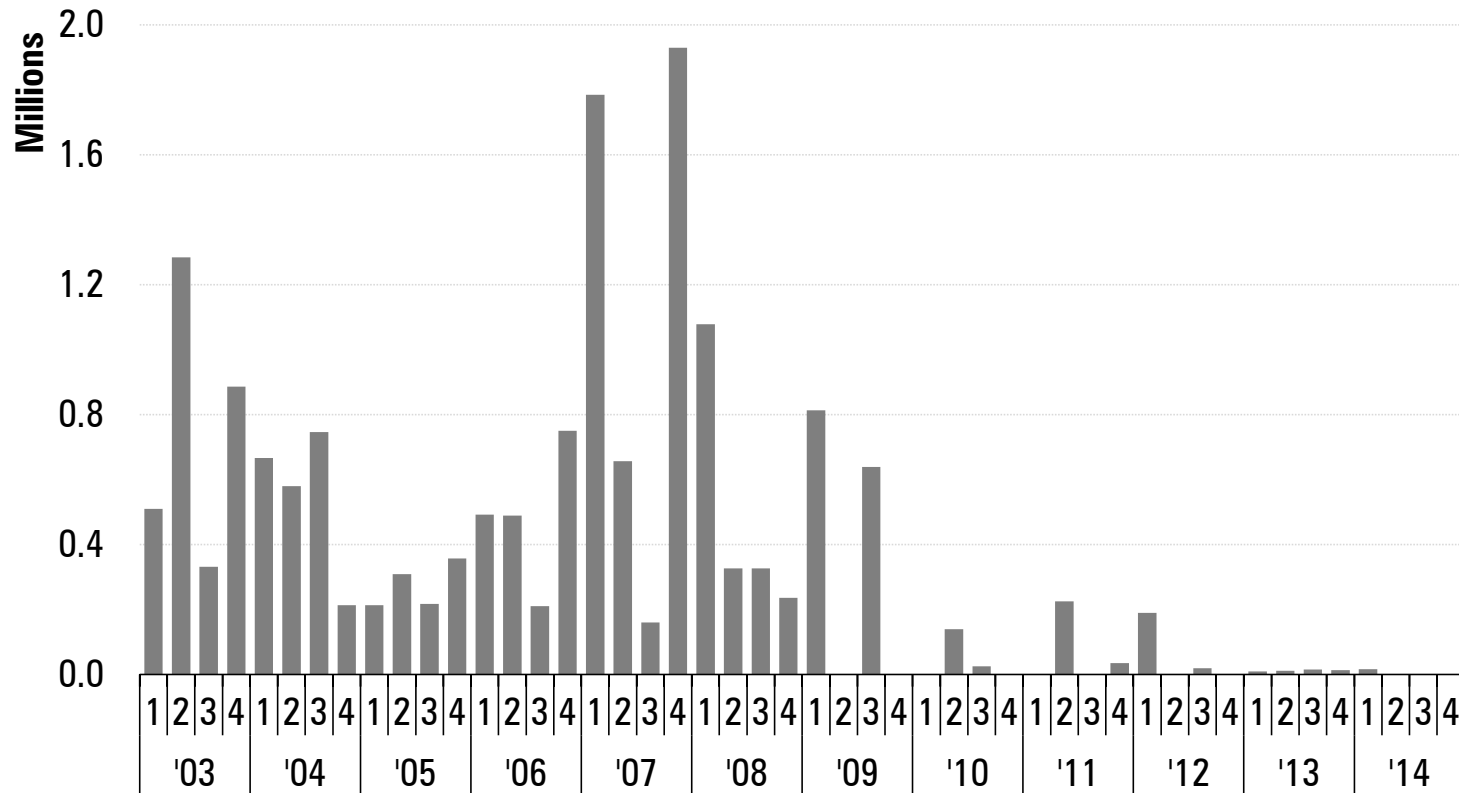


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# Southern Nevada Retail Market

## New Completions (in SF)



Source: Applied Analysis



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# Goodwill 16,000 SF

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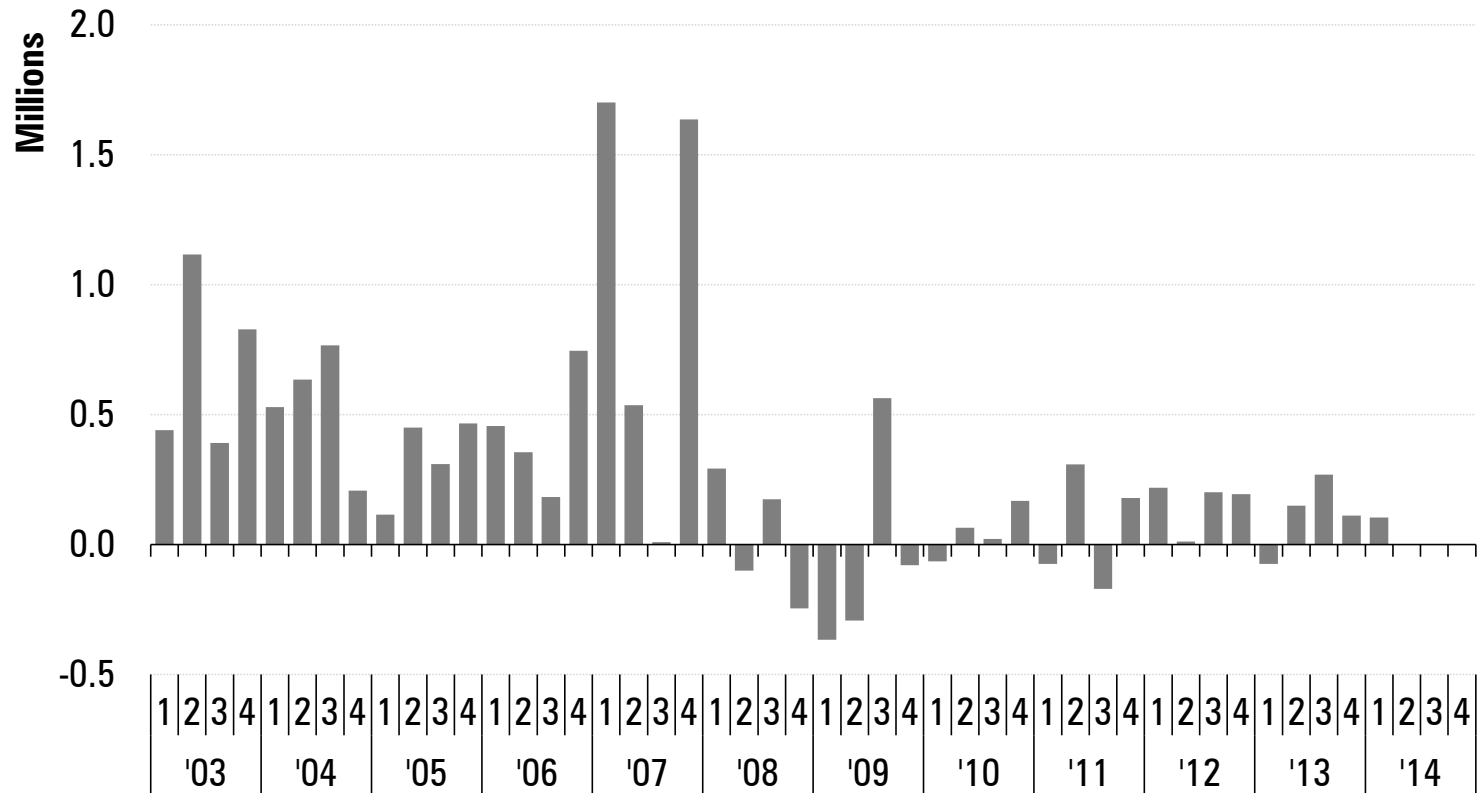


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# Southern Nevada Retail Market

## Net Absorption (in SF)



Source: Applied Analysis



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# Charming Charlie's 5,100 SF

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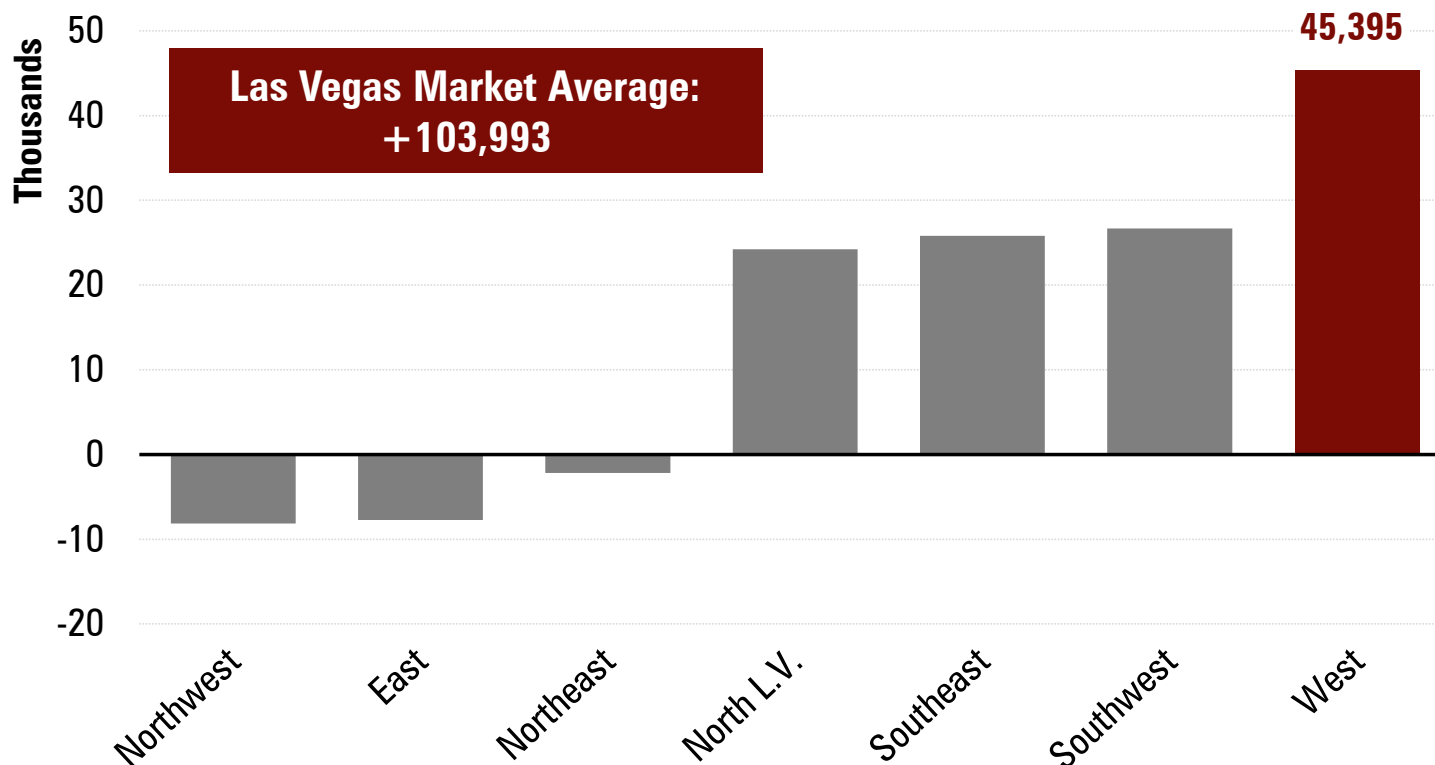


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# Southern Nevada Retail Market

## Net Absorption by Submarket | Q1 2014



Source: Applied Analysis

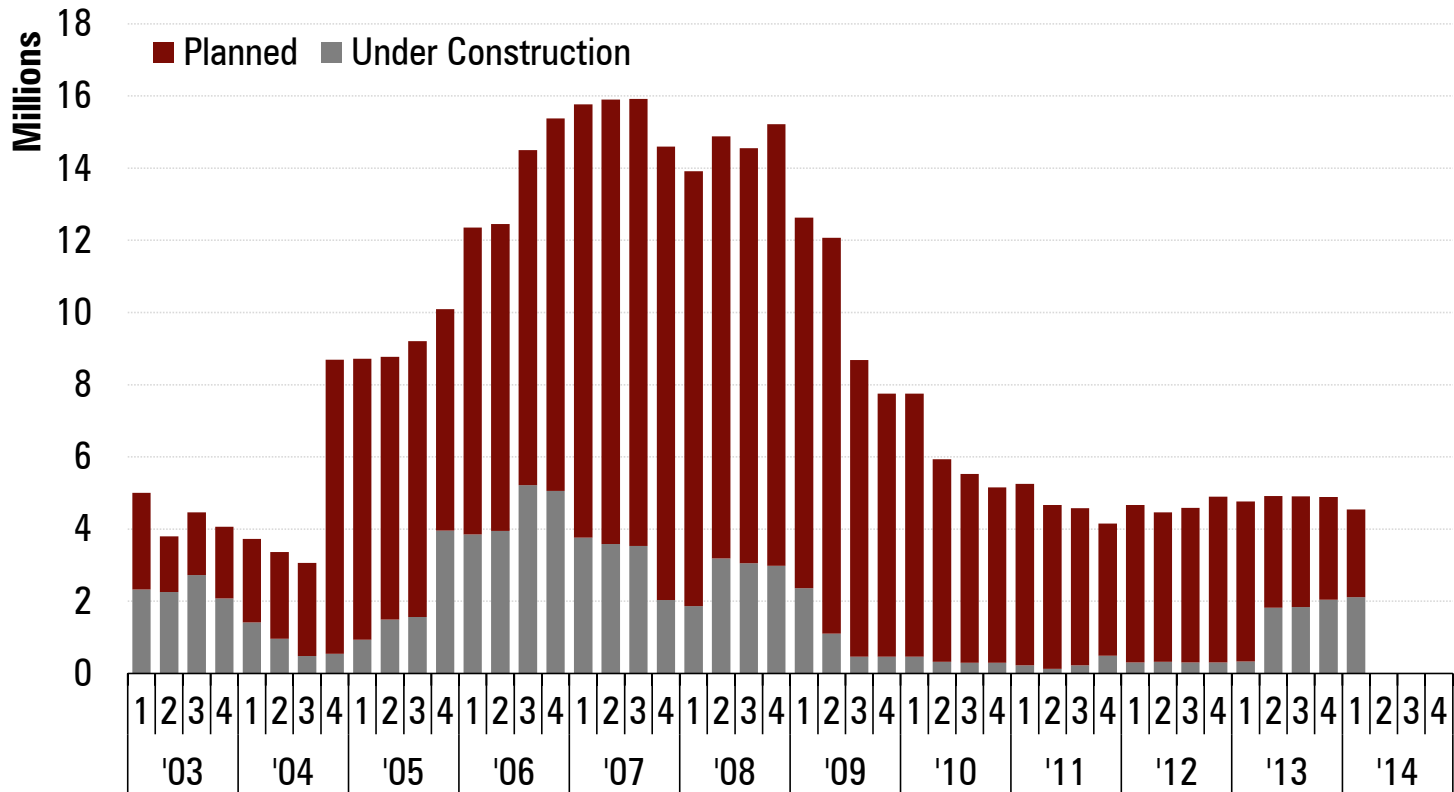


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# Southern Nevada Retail Market Planned and Under Construction (in SF)



Source: Applied Analysis

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# Las Vegas Athletic Club

## 87,700 SF

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# **Shops at Summerlin 1,500,000 SF**

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# Tivoli Village Phase II 300,000 SF

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# Sahara Center 200,000 SF

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# Green Valley Crossing Phase III (Sprouts Farmers Market) 25,000 SF

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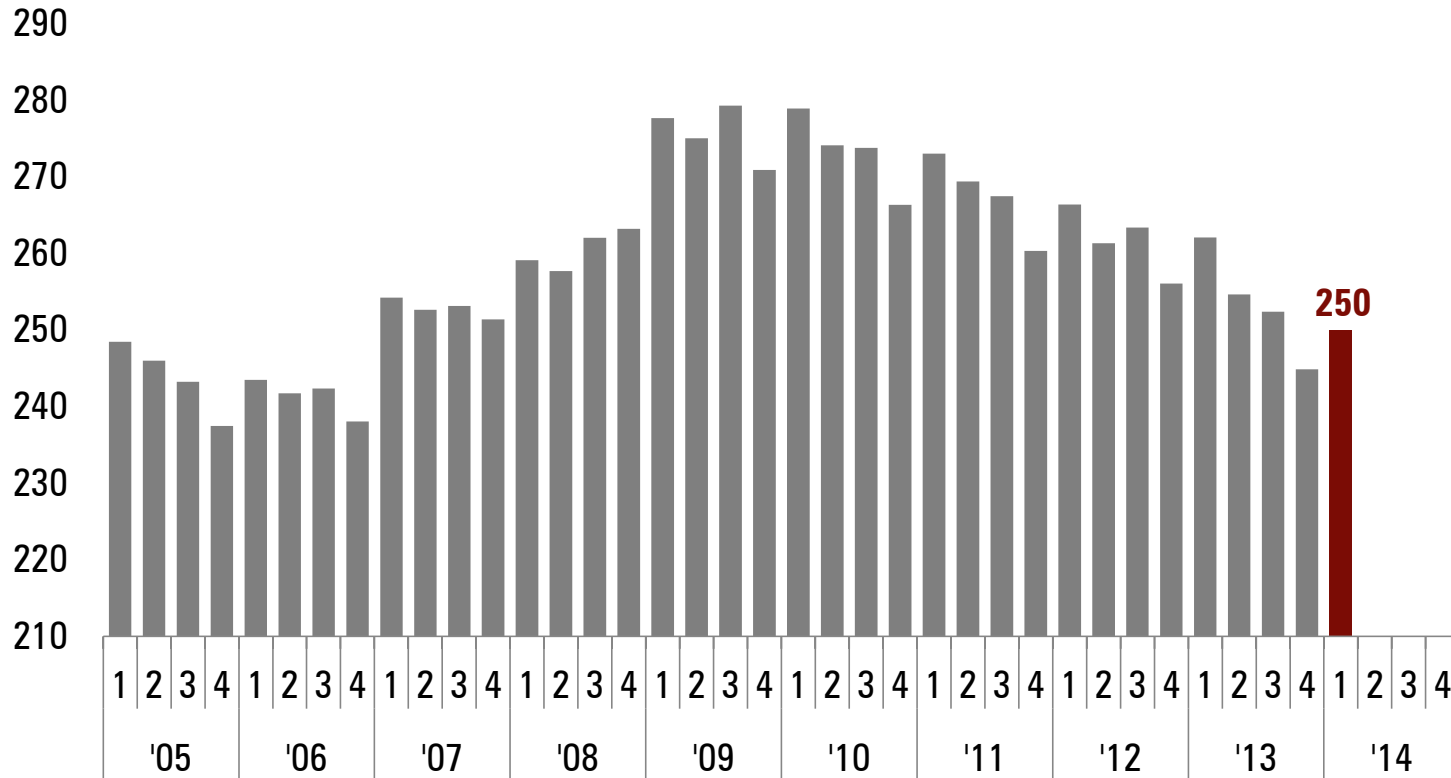
SEARCH

BLOG

2014/11/15

+

# Retail Market | Occupied Space (SF) per Retail-Using Employee



Source: Applied Analysis, Nevada Department of Employment, Training & Rehabilitation






# KEY CONSIDERATIONS

## MOVING FORWARD

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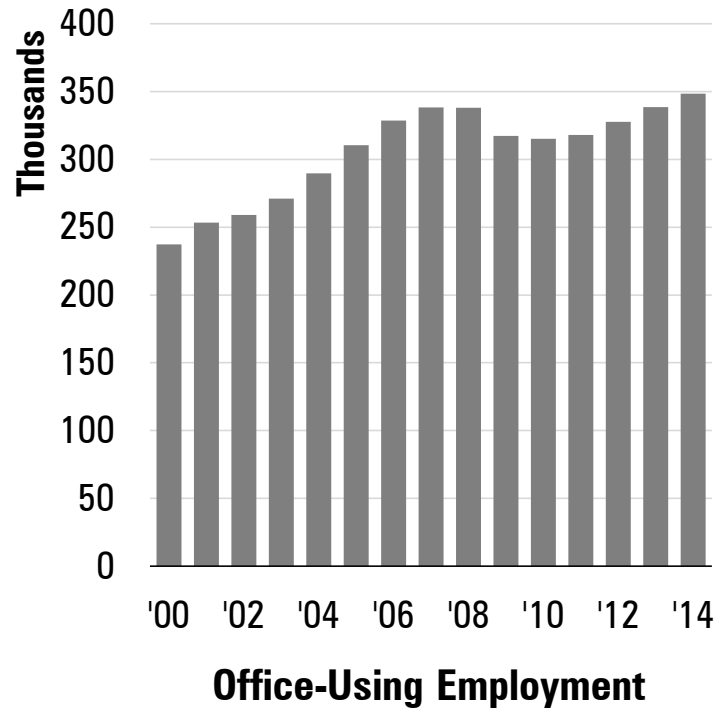


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# Office Market Considerations



Medical Office Demand

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# Industrial Market Considerations



**Construction Industry**



**Medical Marijuana**

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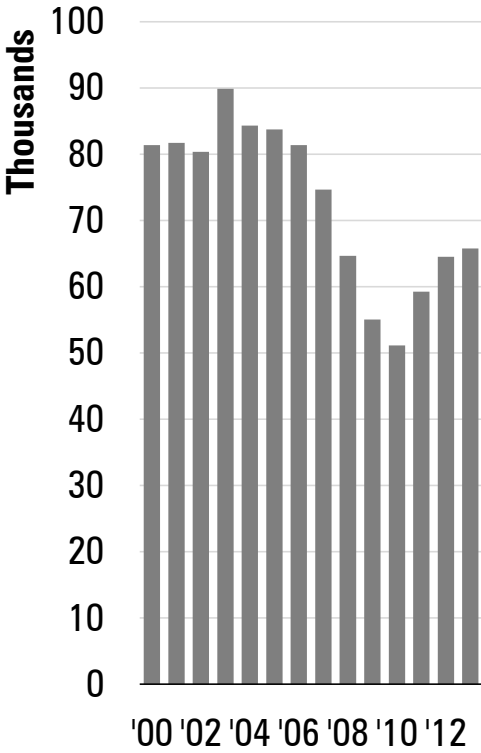
**BLOG**  
2014/06/25



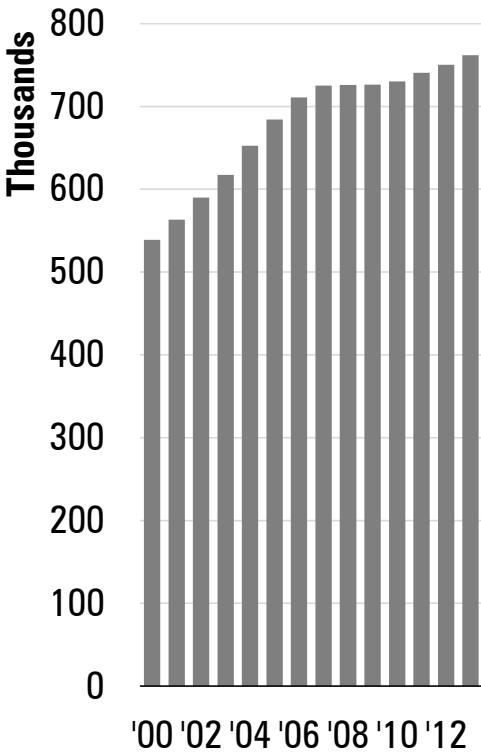
# Retail Market Considerations



**Taxable Retail Sales**



**Driv. License Surrenders**



**Elec. Meter Connections**



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