

If Economic Development Is Nevada's New Economy,
What Does Nevada's New Future Look Like?





What is
Economic Development?



APPLIED
ANALYSIS



If Economic Development Is Nevada's New Economy,

What Does Nevada's New Future Look Like?



Is it the Recruiting of New Businesses?



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If Economic Development Is Nevada's New Economy,

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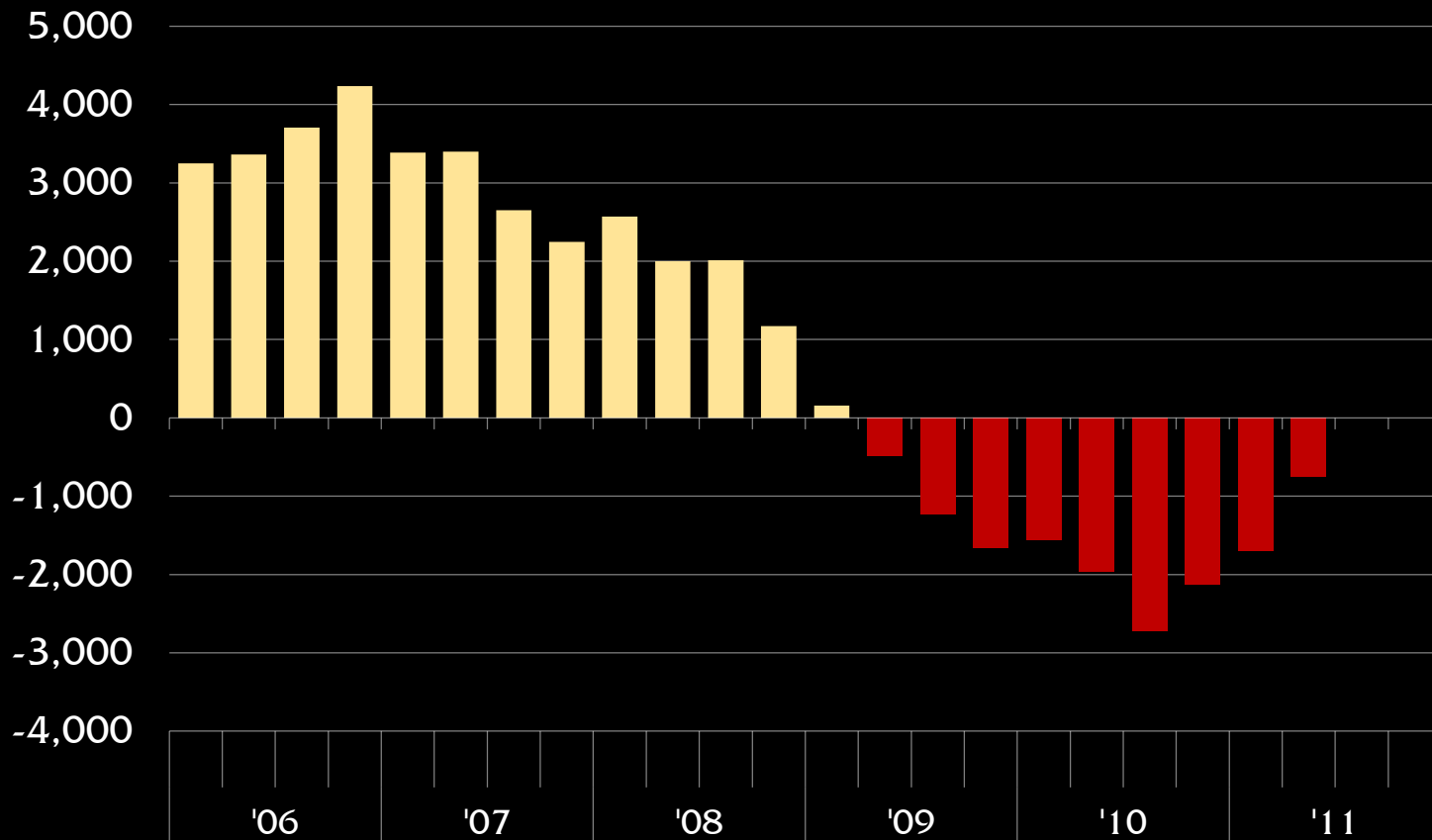


Date of Presentation:

January 19, 2012

Privately-Owned Business Creation

Clark County, Nevada



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If Economic Development Is Nevada's New Economy,

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Is it Adding New Jobs to the Economy?



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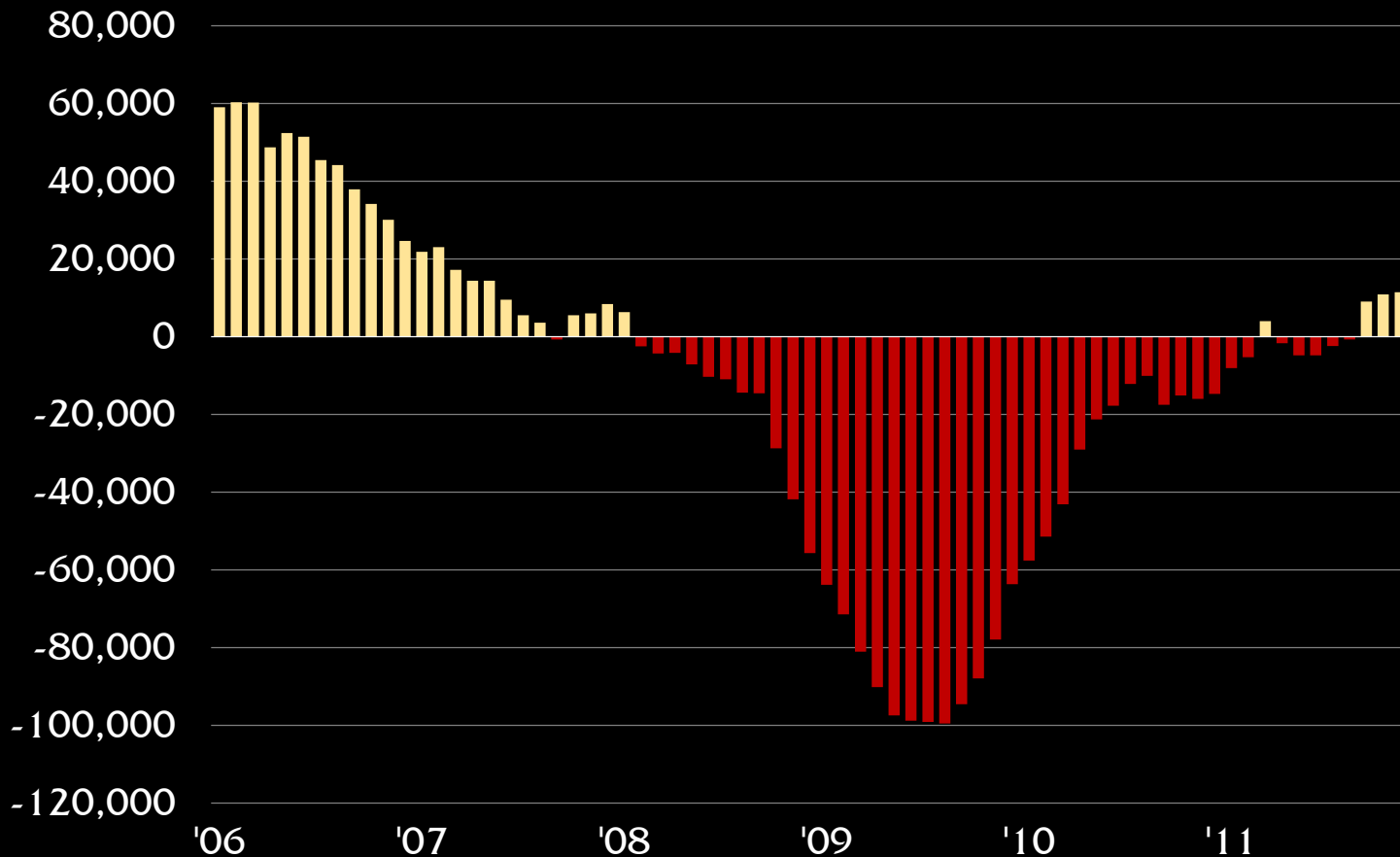
If Economic Development Is Nevada's New Economy,

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Year-Over-Year Job Growth

Las Vegas MSA



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If Economic Development Is Nevada's New Economy,

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Is it Changing the Mix of Businesses?



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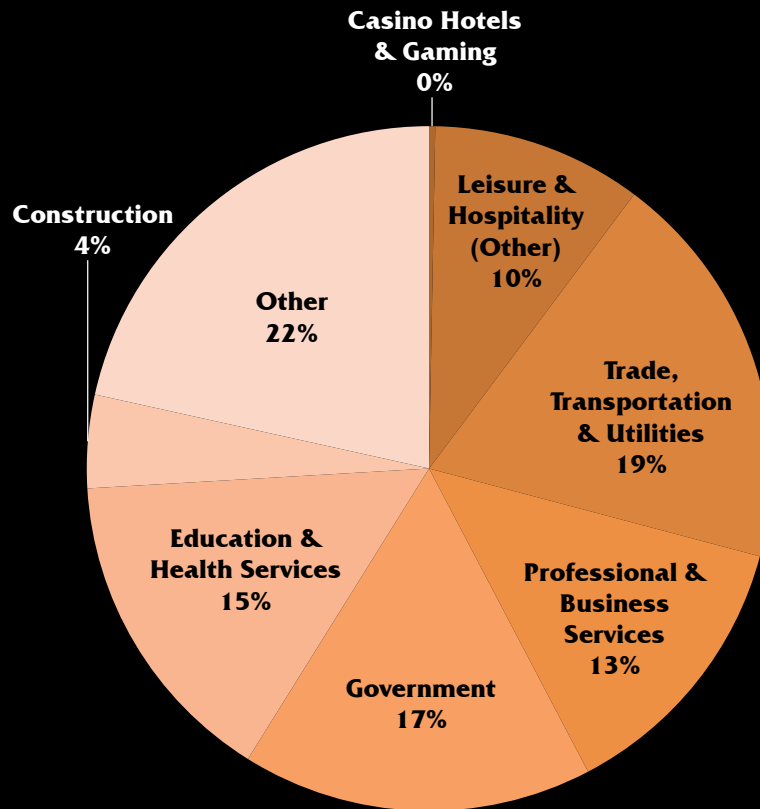


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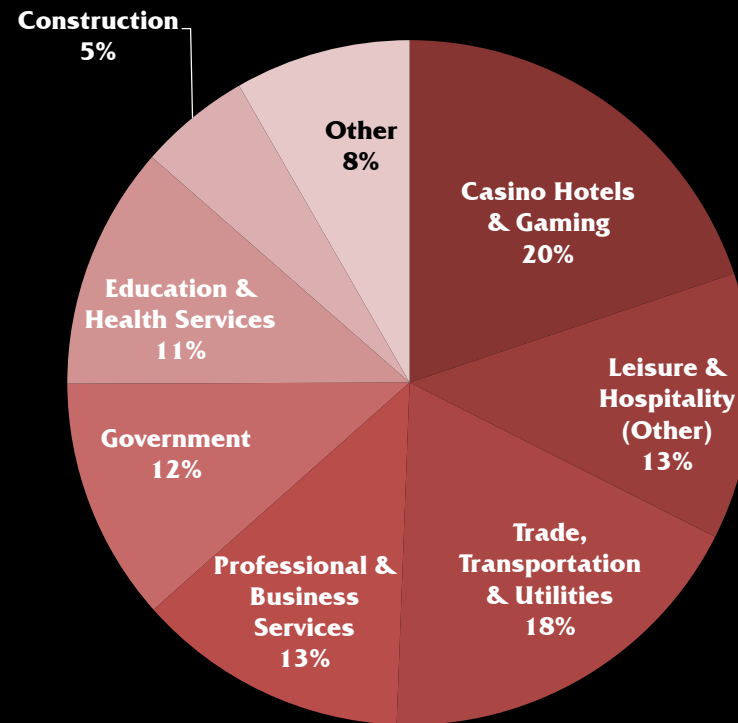
What Does Nevada's New Future Look Like?



United States Employment Distribution



Las Vegas MSA Employment Distribution



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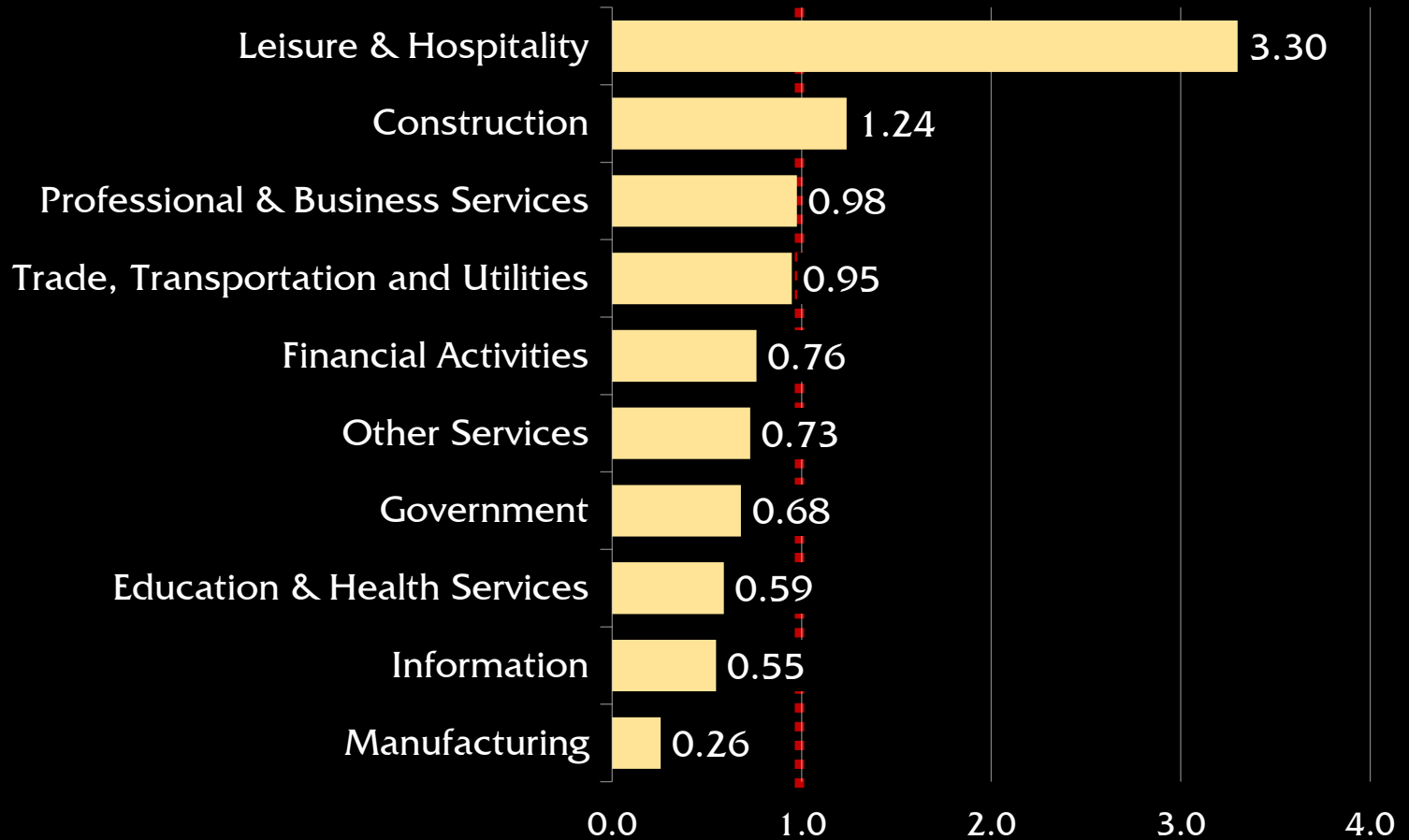
If Economic Development Is Nevada's New Economy,

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Southern Nevada Location Quotients

By Major Industry



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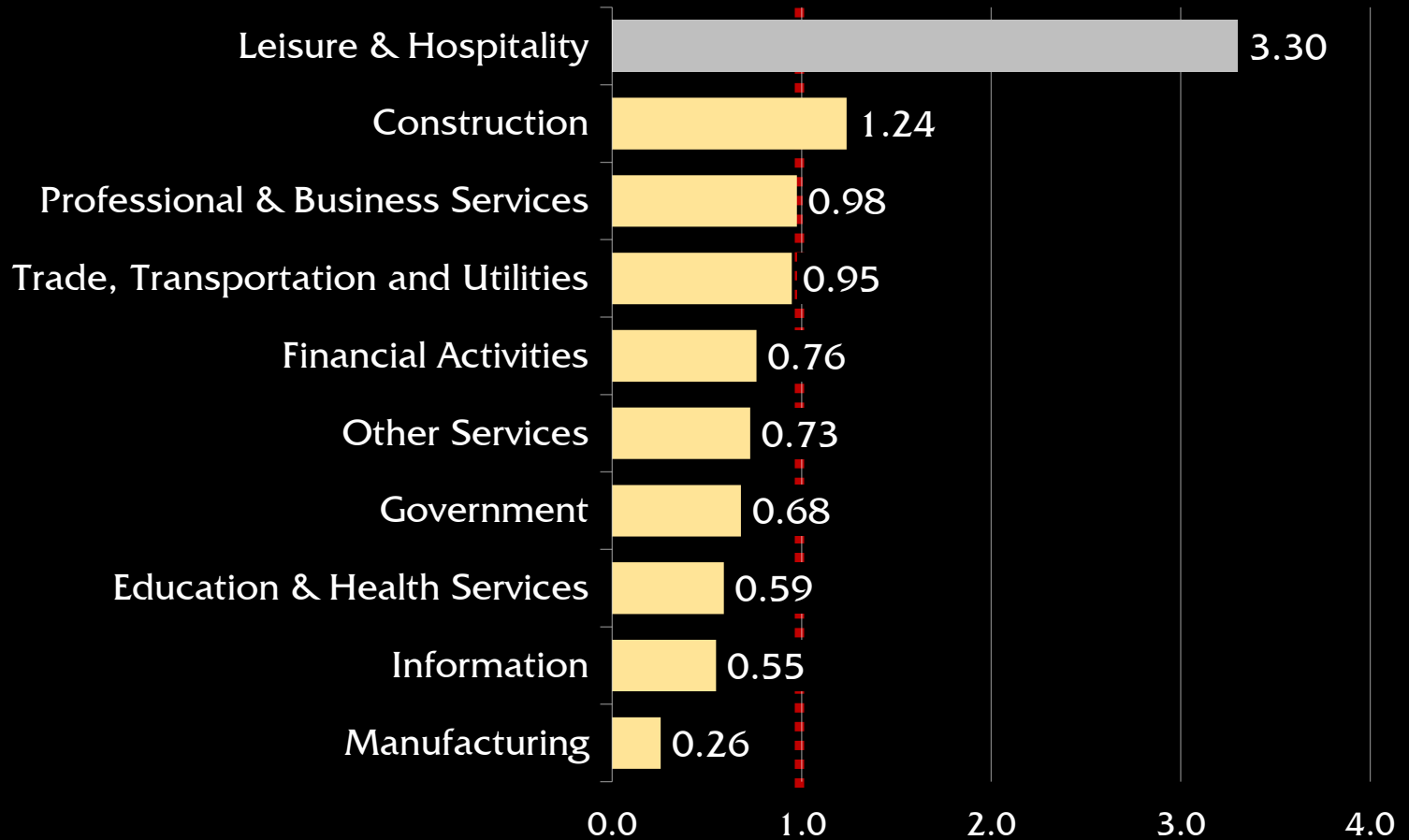
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Southern Nevada Location Quotients

By Major Industry



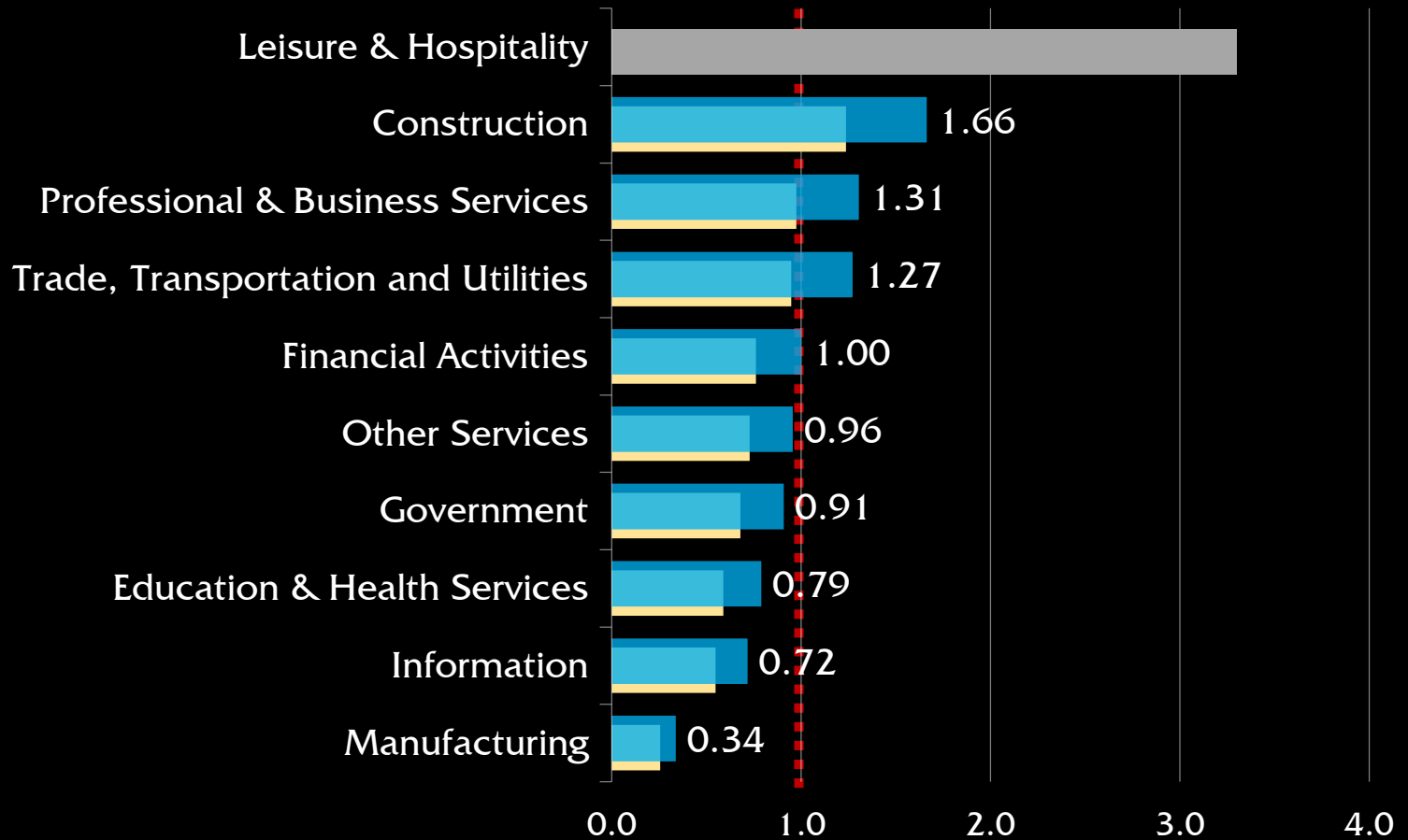
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If Economic Development Is Nevada's New Economy,

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Southern Nevada Location Quotients By Major Industry



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If Economic Development Is Nevada's New Economy,

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What is the Least Diversified State Economy in the United States?



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If Economic Development Is Nevada's New Economy,

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Date of Presentation:

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1. Wyoming
2. Washington, DC
3. Nevada
4. Hawaii
5. North Dakota



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What is the Most Diversified State Economy in the United States?



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1. Missouri
2. Oregon
3. North Carolina
4. Idaho
5. Arizona



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What State Has Increased Its Diversity Most During the Past 10 Years?



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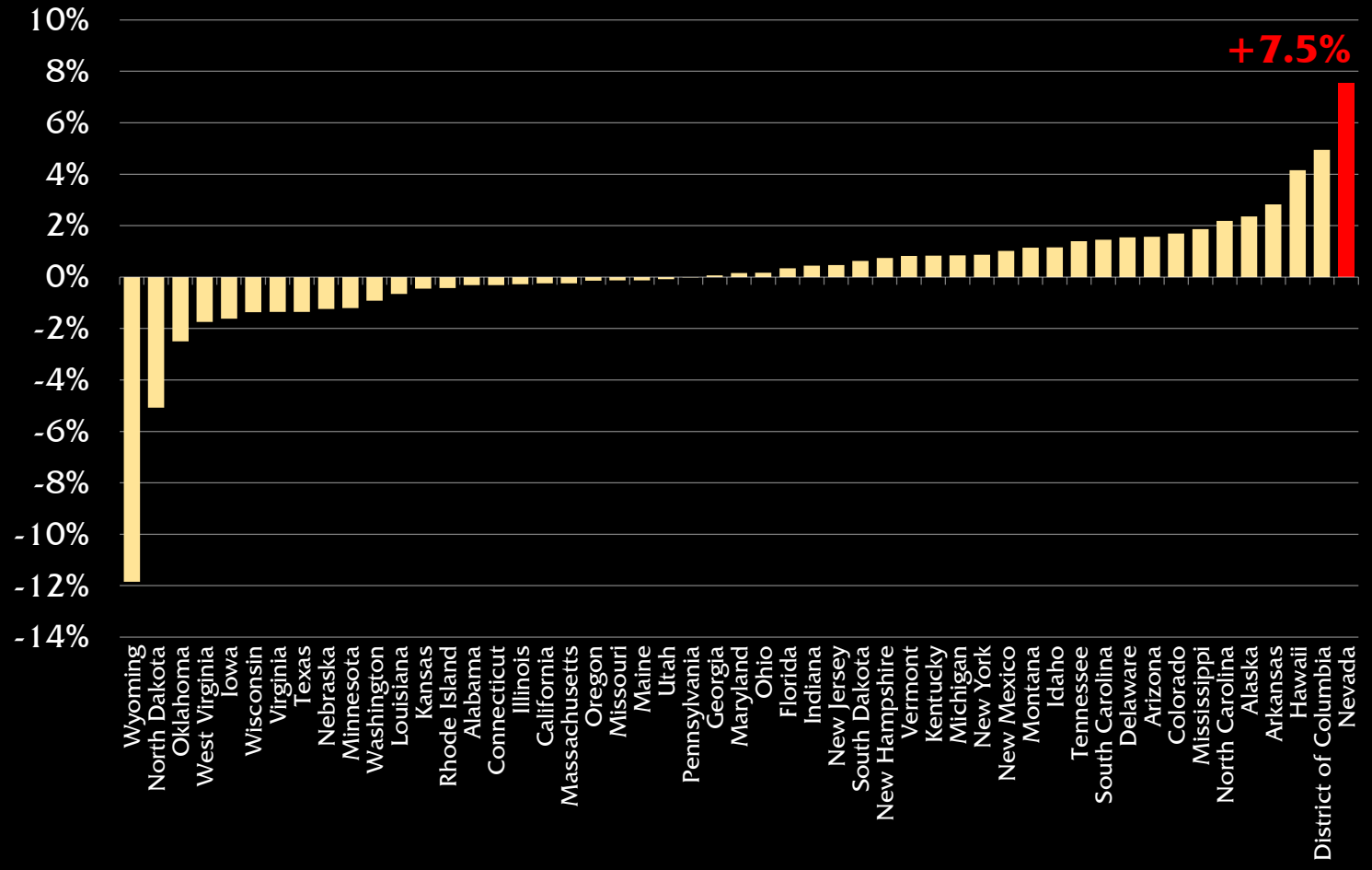


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Hachman Index Comparisons

Growth Rate Past 10 Years



If Economic Development Is Nevada's New Economy,
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45

11,000



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 NEVADA DEVELOPMENT AUTHORITY  APPLIED ANALYSIS      If Economic Development Is Nevada's New Economy, **What Does Nevada's New Future Look Like?**

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AMONIX™
POWERING THE FUTURE NOW™

Origin	Orange County, CA
Month of Win	June 2010
Employees	269
Annual Payroll	\$9.8 million
Average Hourly Wage	\$17.55
Economic Impact (5-Yr)	\$608.4 million
Local Tax Revenue (5-Yr)	\$9.4 million
State Tax Revenue (5-Yr)	\$2.6 million
Total Capital Investment	\$18.8 million



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If Economic Development Is Nevada's New Economy,

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CORCELL[®]

saving baby's cord blood[®]

Origin	Los Angeles, CA
Month of Win	September 2009
Employees	22
Annual Payroll	\$1.3 million
Average Hourly Wage	\$29.17
Economic Impact (5-Yr)	\$19.0 million
Local Tax Revenue (5-Yr)	\$0.7 million
State Tax Revenue (5-Yr)	\$0.2 million
Total Capital Investment	\$1.8 million



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If Economic Development Is Nevada's New Economy,

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BARBOUR WELL, INC.

*Oil and Geothermal
Drilling Services*

Origin	Ventura, CA
Month of Win	December 2009
Employees	25
Annual Payroll	\$2.3 million
Average Hourly Wage	\$45.00
Economic Impact (5-Yr)	\$122.1 million
Local Tax Revenue (5-Yr)	\$1.5 million
State Tax Revenue (5-Yr)	\$0.5 million
Total Capital Investment	\$1.3 million



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If Economic Development Is Nevada's New Economy,

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Origin	NV (Start-up)
Month of Win	June 2010
Employees	12
Annual Payroll	\$0.6 million
Average Hourly Wage	\$24.04
Economic Impact (5-Yr)	\$25.7 million
Local Tax Revenue (5-Yr)	\$0.4 million
State Tax Revenue (5-Yr)	\$0.1 million
Total Capital Investment	\$0.3 million



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ec•o•nom•ic de•vel•op•ment

ˌɛkəˈnämik; diˈveləpmənt

the process by which a community creates, retains, and reinvests wealth and improves the quality of life



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If Economic Development Is Nevada's New Economy,

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Where is Nevada Positioned

From an Economic Development Standpoint?

Global Metro Monitor

B Metropolitan Policy Program
at BROOKINGS

Las Vegas, United States • North America

ECONOMIC PERFORMANCE RANKINGS

2010-2011
179th
INCOME CHANGE (%)
-0.3
EMPLOYMENT CHANGE (%)
-0.1

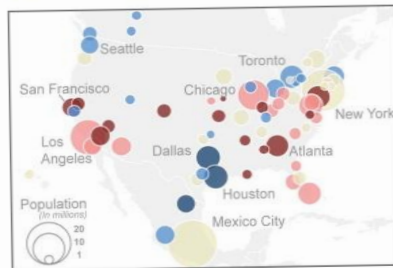
2007-2010 (minimum year)
199th
INCOME CHANGE (%)
-8.5
EMPLOYMENT CHANGE (%)
-9.2

1993-2007
18th
INCOME CHANGE (%)
+1.9
EMPLOYMENT CHANGE (%)
+5.9

GEOGRAPHY

Metro performance, 2010-2011

- STRONGEST
- SECOND-STRONGEST
- MIDDLE
- SECOND-WEAKEST
- WEAKEST



NOTES

Income is calculated as gross domestic product divided by population. Ranking values are based on an index of employment and income performance. Some are based on forecasted estimates; please see report for further details. The year of minimum annual growth rate between 2007 and 2010 was identified for each metro. Output (gross value added) of an industry is the difference between an industry's gross output and all its intermediary purchases, domestic or imported. Source: Brookings analysis of data from the Oxford Economics, Moody's Analytics and the US Census Bureau.

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www.brookings.edu/globalmetromonitor

#globalmm

INDUSTRY

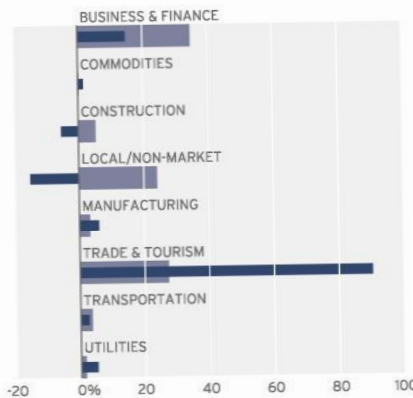
Metro output, 2010-2011 Change (%)

+1.2

Industry type

Trade & tourism, mixed growth

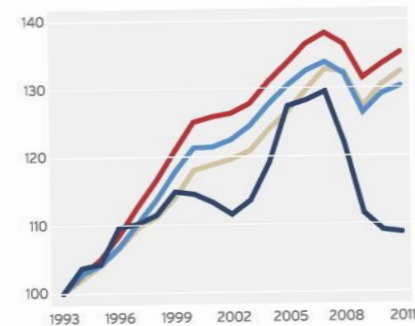
- SHARE OF OUTPUT, 2010 (%)
- CONTRIBUTION TO OUTPUT CHANGE, 2010-2011 (%)



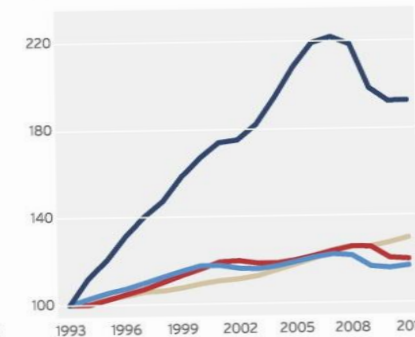
TRENDS

METRO COUNTRY REGIONAL METROS ALL 200 METROS

Income (1993 value = 100)



Employment (1993 value = 100)



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If Economic Development Is Nevada's New Economy,

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what
matters?

what
doesn't?



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Is Nevada's Challenge
Structural or Cyclical?



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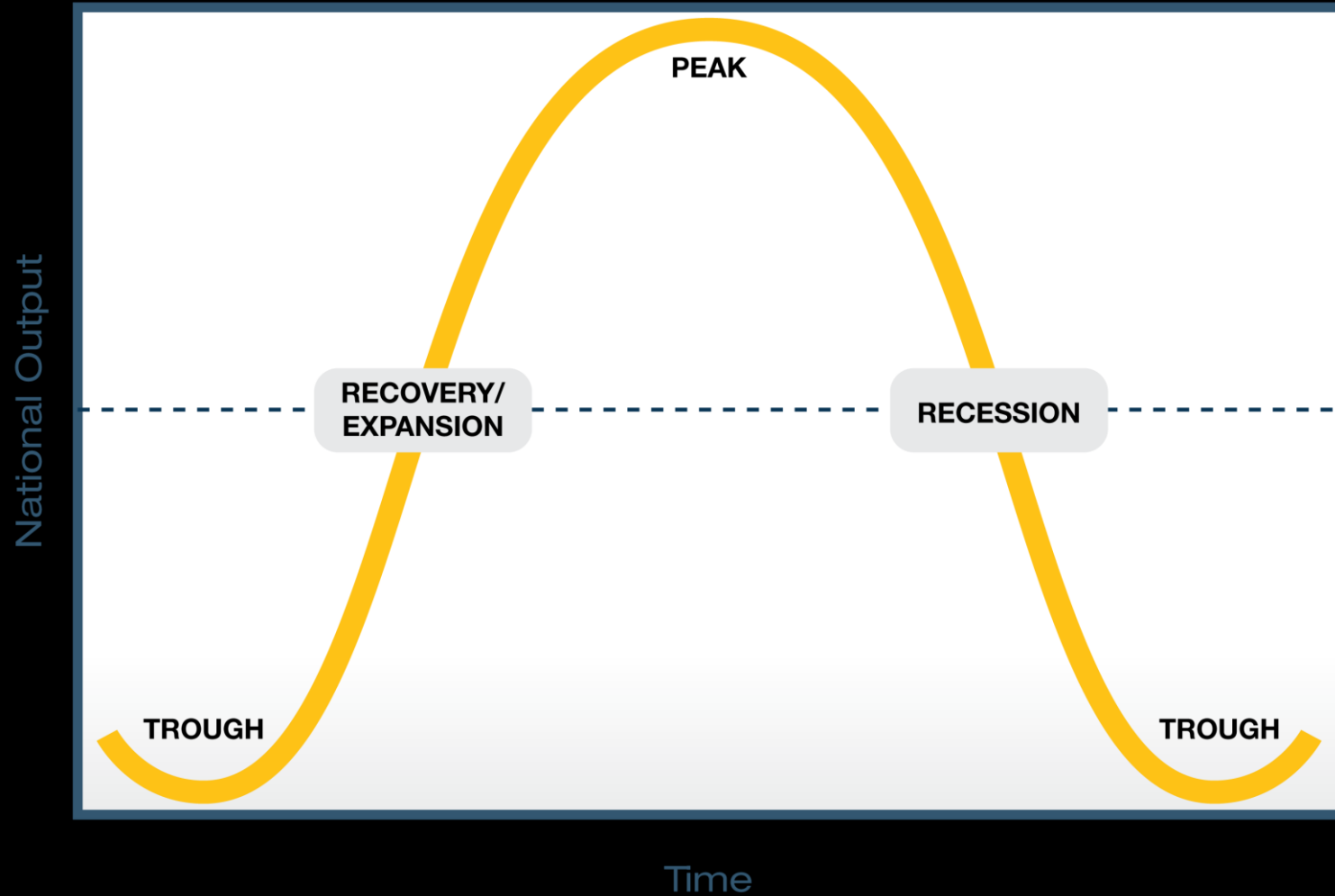


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Phases of the Business Cycle



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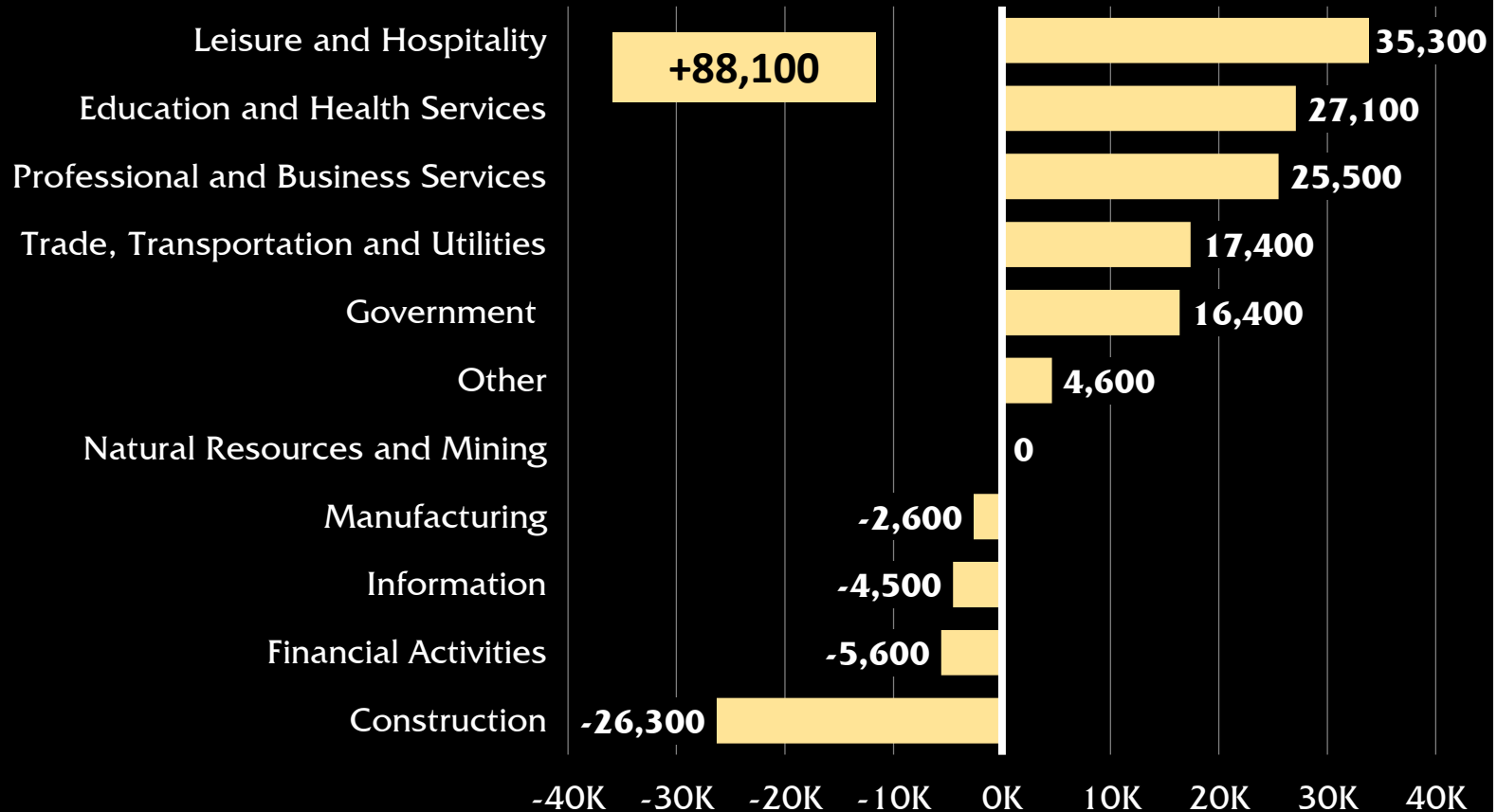
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Southern Nevada Shift-Share Analysis

Net Growth | Past 10 Years



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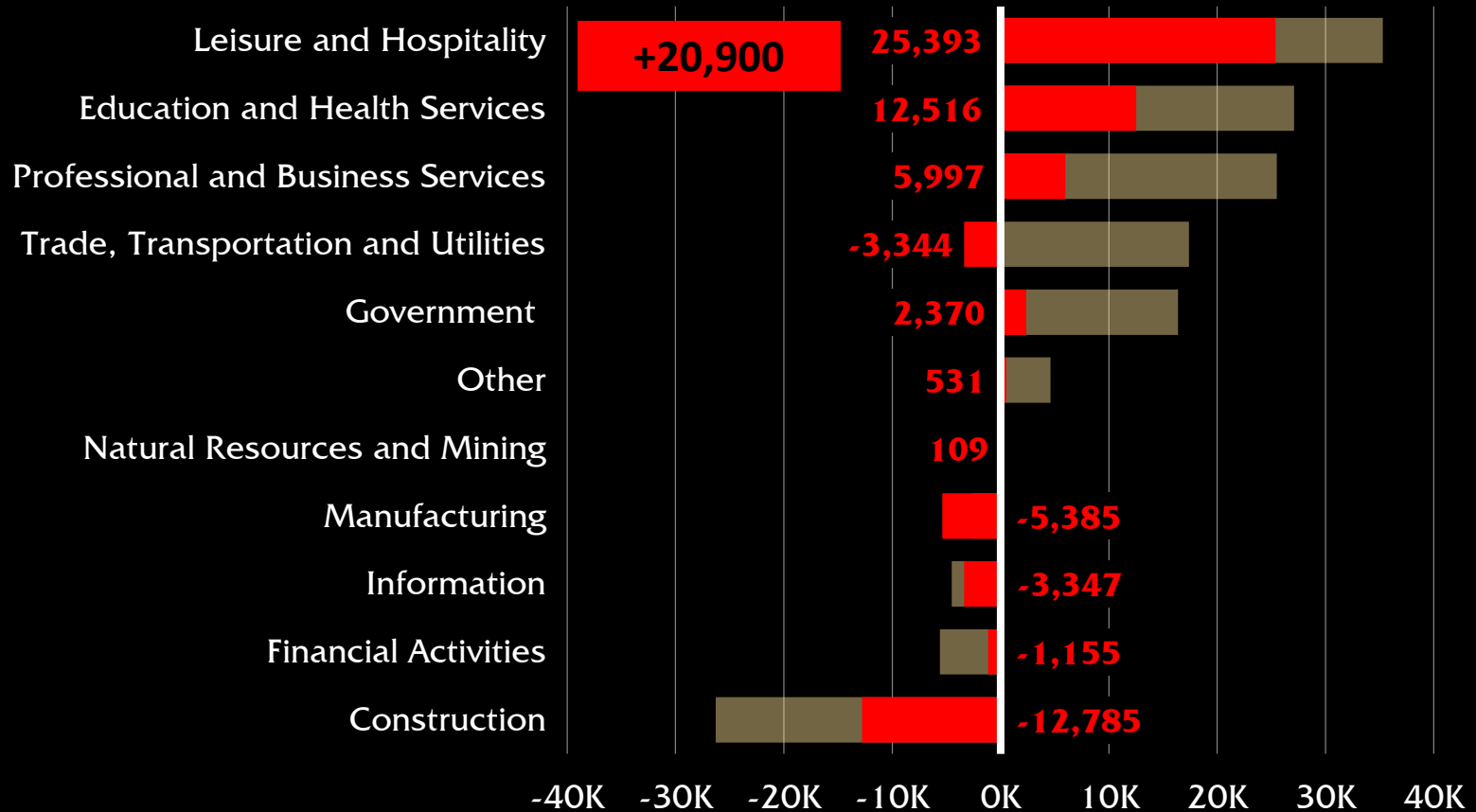


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Southern Nevada Shift-Share Analysis

Standardized Net Growth | Past 10 Years



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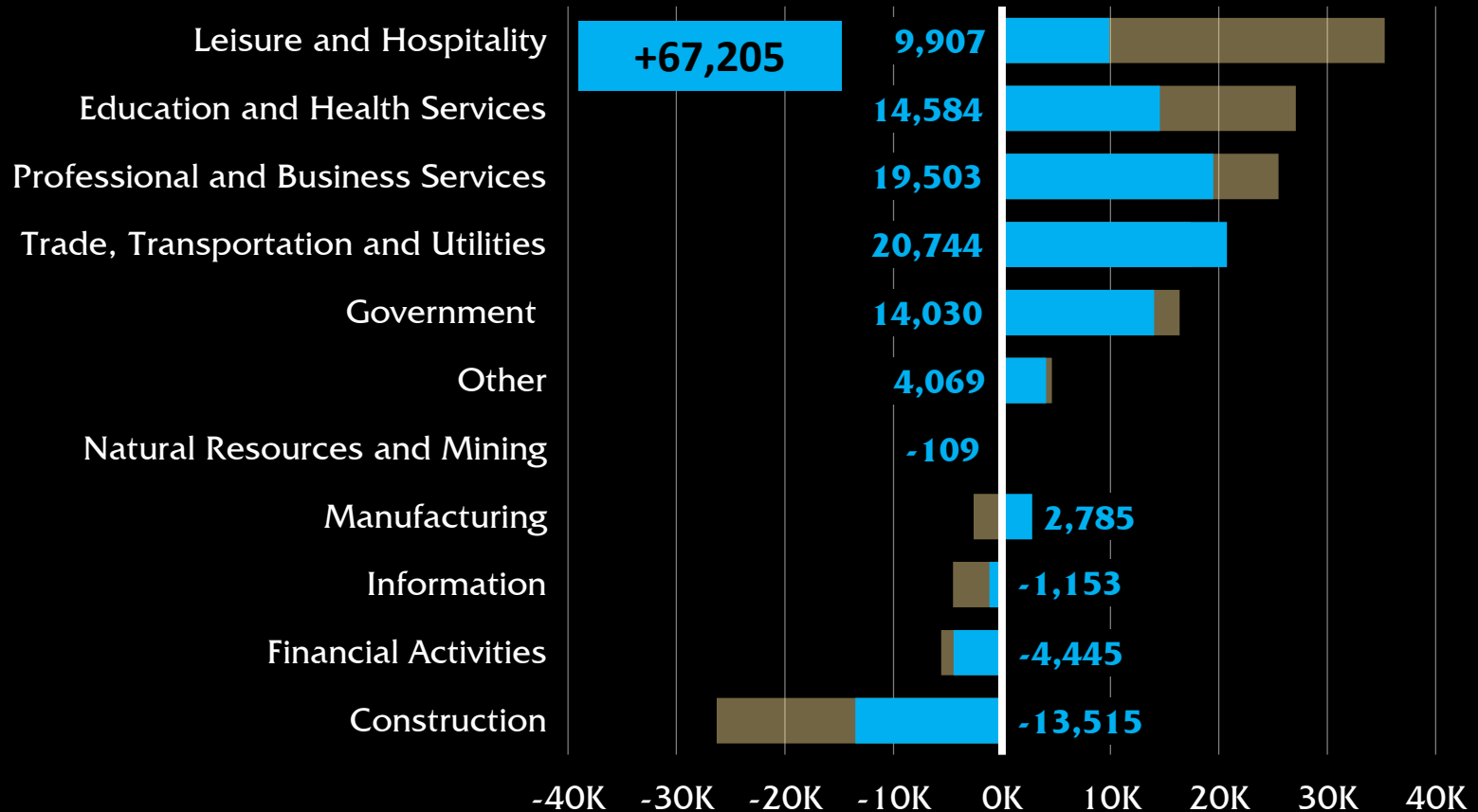
If Economic Development Is Nevada's New Economy,

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Southern Nevada Shift-Share Analysis

Regional Shift Net Change | Past 10 Years



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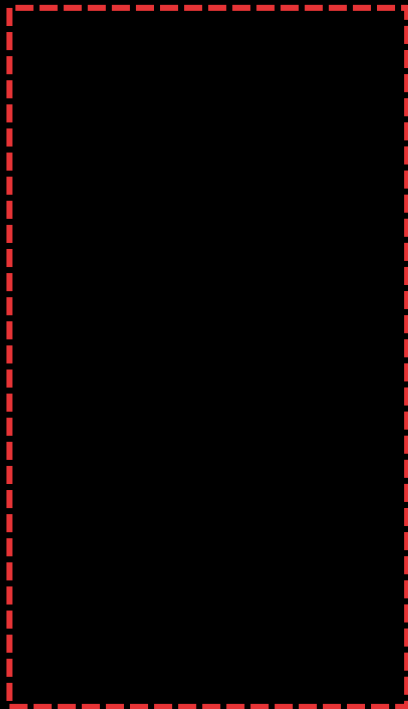
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Sources of Employment Growth 2001 - 2011

88,100



APPLIED ANALYSIS



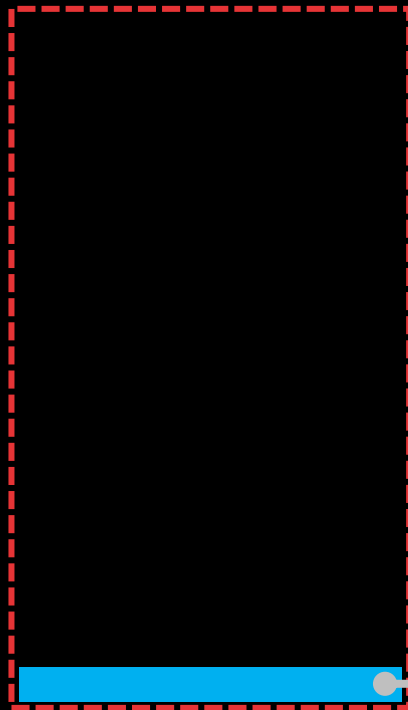
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Sources of Employment Growth 2001 - 2011

88,100



If Las Vegas Employment
Would Have Grown at the
National Rate of Employment
Growth (0.6%), We Would
have Added 4,421 Jobs



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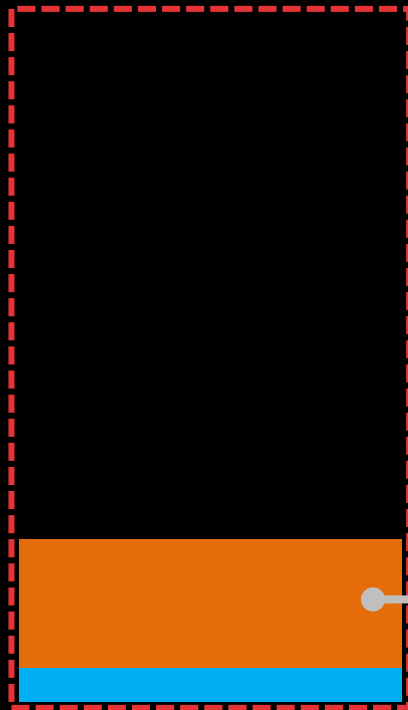
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Sources of Employment Growth 2001 - 2011

88,100



19% of Job Growth is
Attributable Southern
Nevada's Industrial Mix
(Faster Growing Industries)



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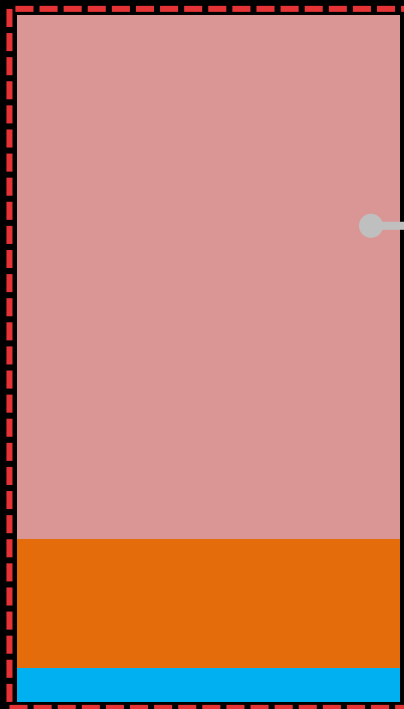
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Sources of Employment Growth 2001 - 2011

88,100



75% of Employment Growth was Attributable to Fact that Businesses in Southern Nevada Grew Faster than Businesses Nationally



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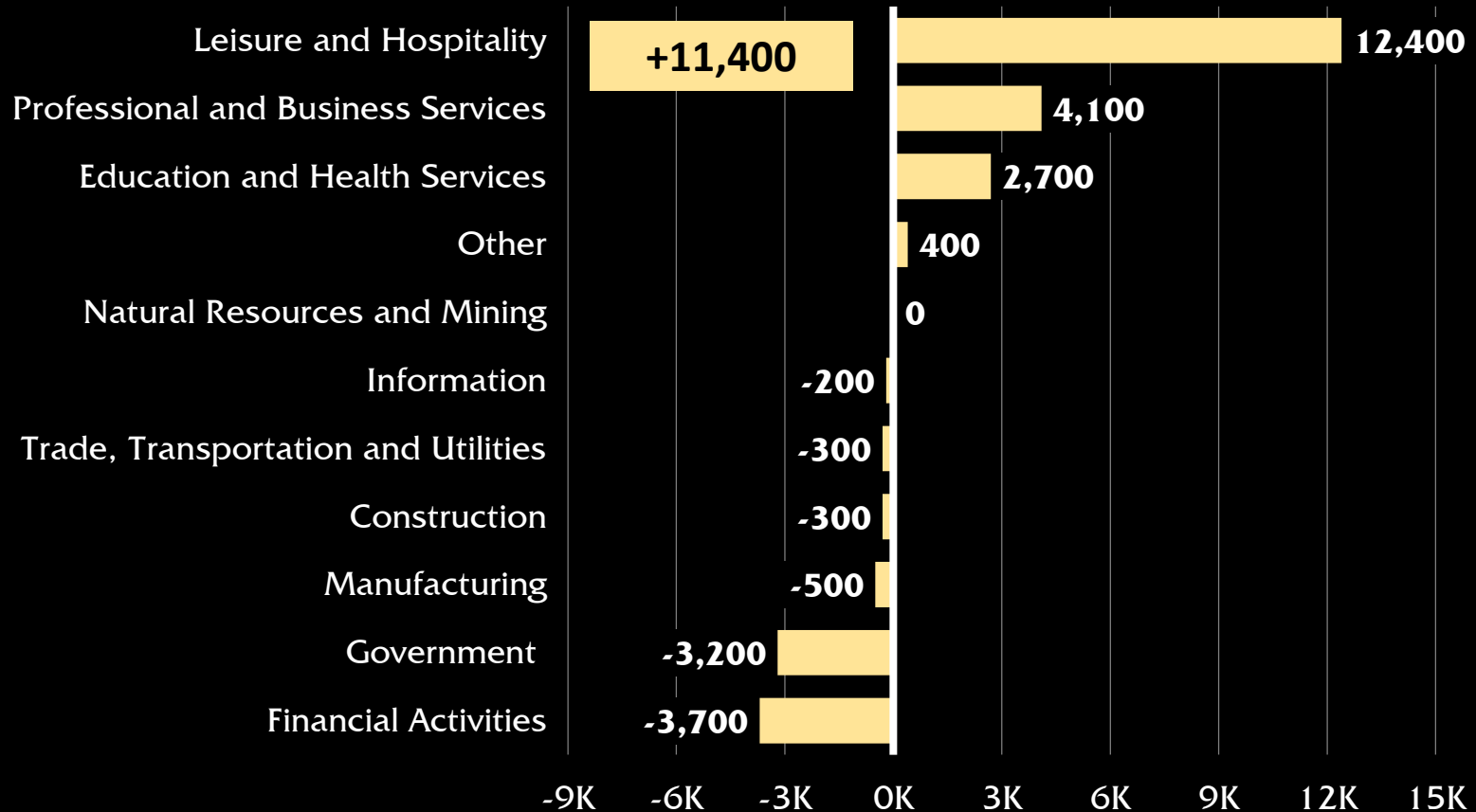
If Economic Development Is Nevada's New Economy,

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Southern Nevada Shift-Share Analysis

Net Growth | Past 12 Months



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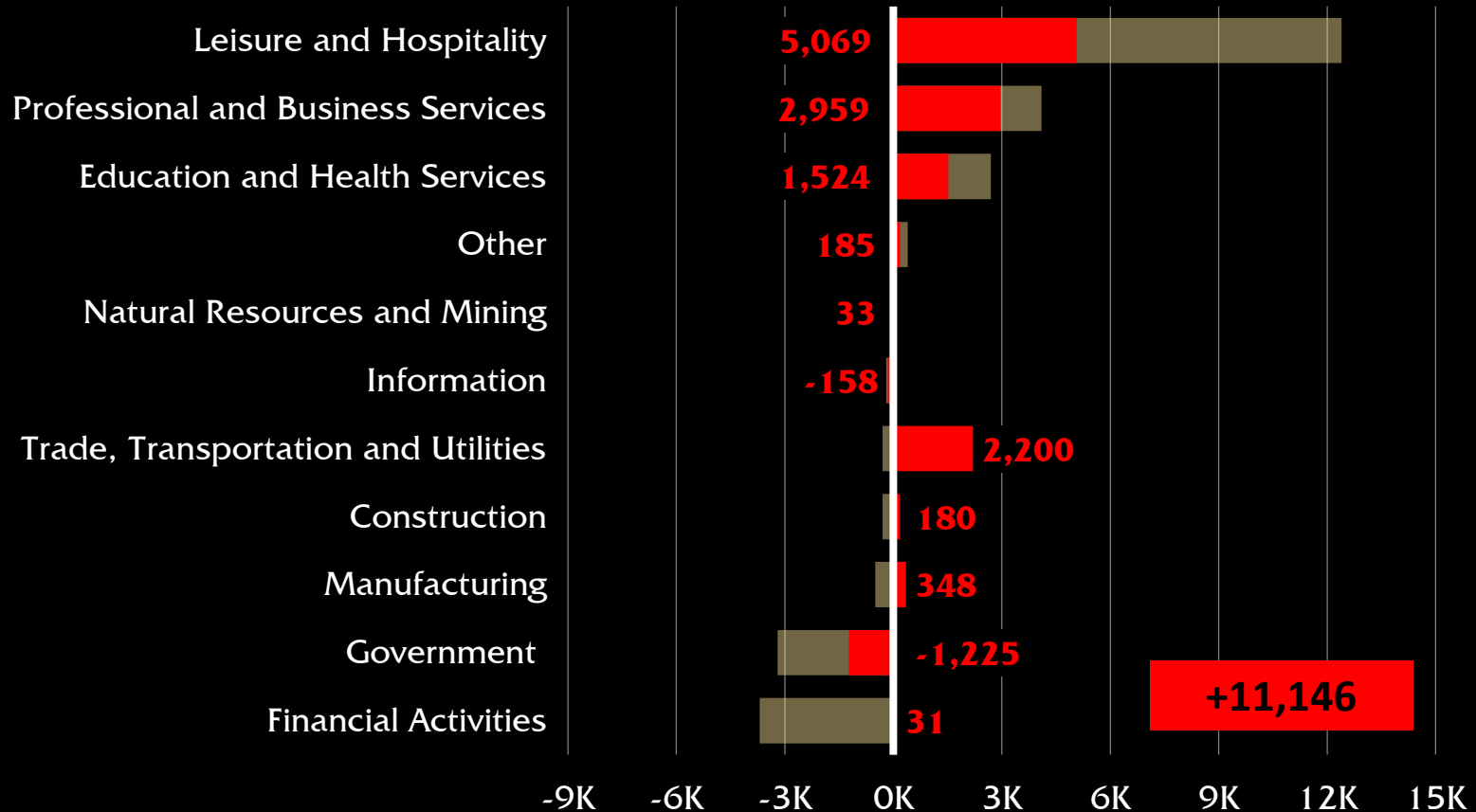
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Southern Nevada Shift-Share Analysis

Standardized Net Growth | Past 12 Months



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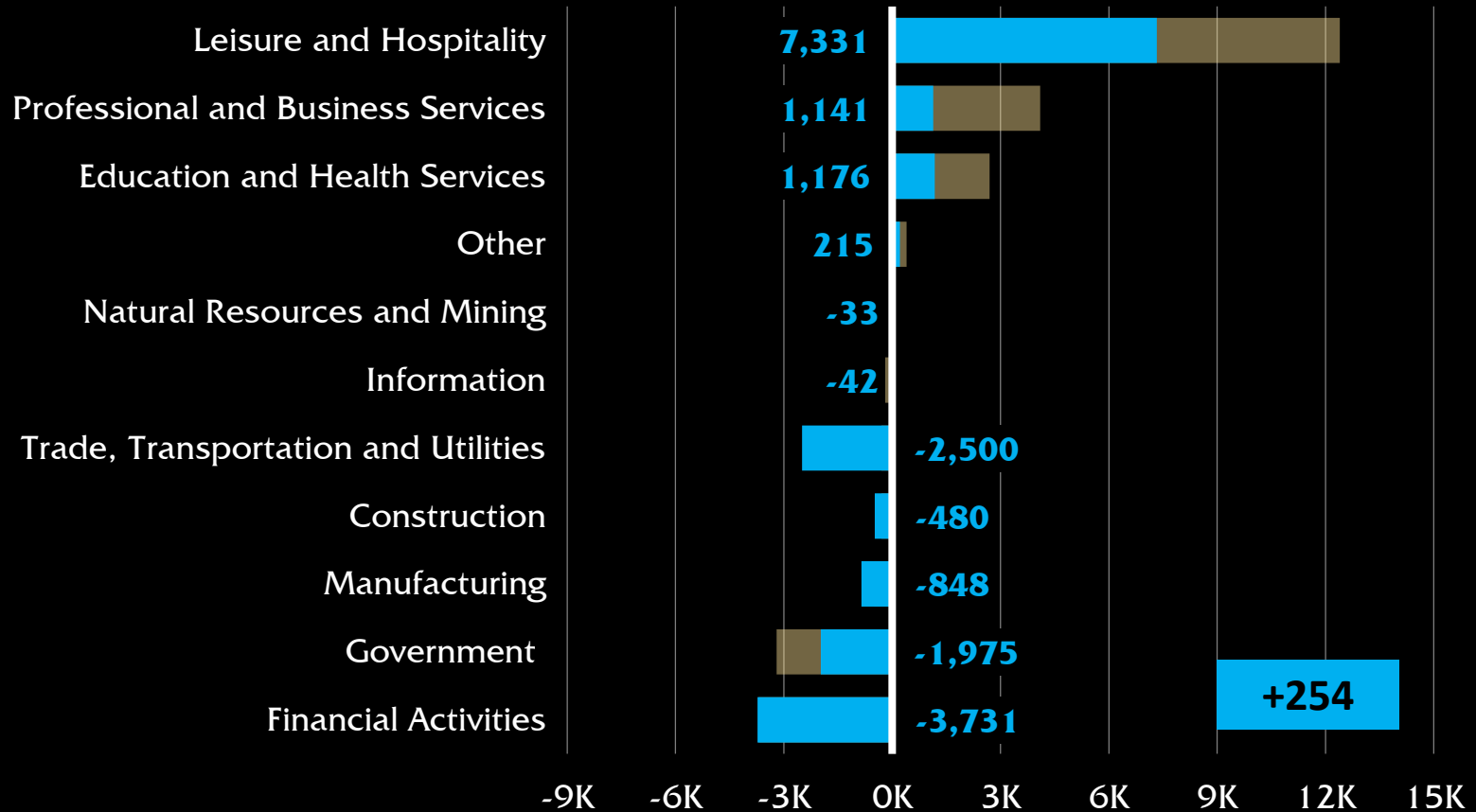


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Southern Nevada Shift-Share Analysis

Regional Shift Net Change | Past 12 Months



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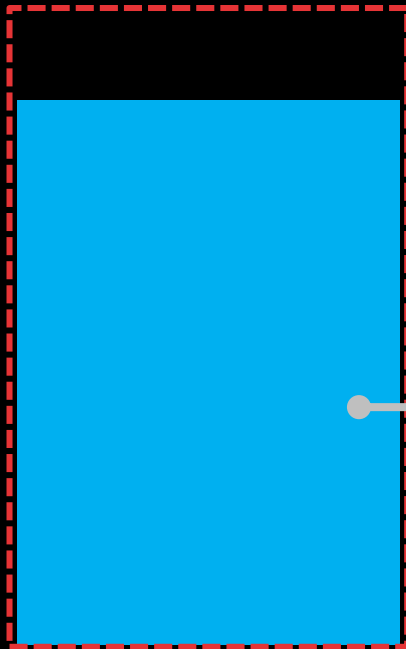
If Economic Development Is Nevada's New Economy,

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Sources of Employment Growth 2010 - 2011

11,400



86% Attributable to National
Rate of Economic Expansion



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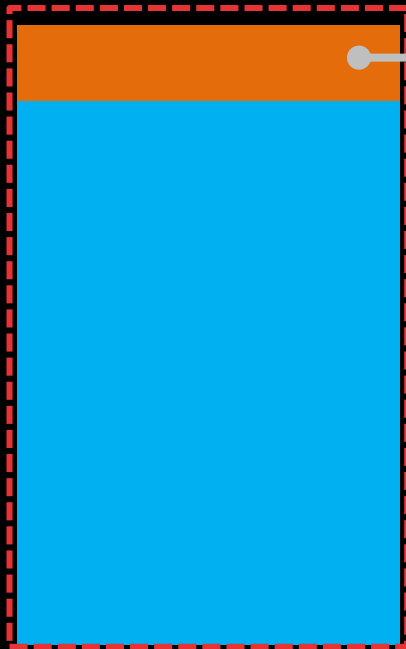
If Economic Development Is Nevada's New Economy,

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Sources of Employment Growth 2010 - 2011

11,400



12% Attributable to Our
Unique Mix of Industries



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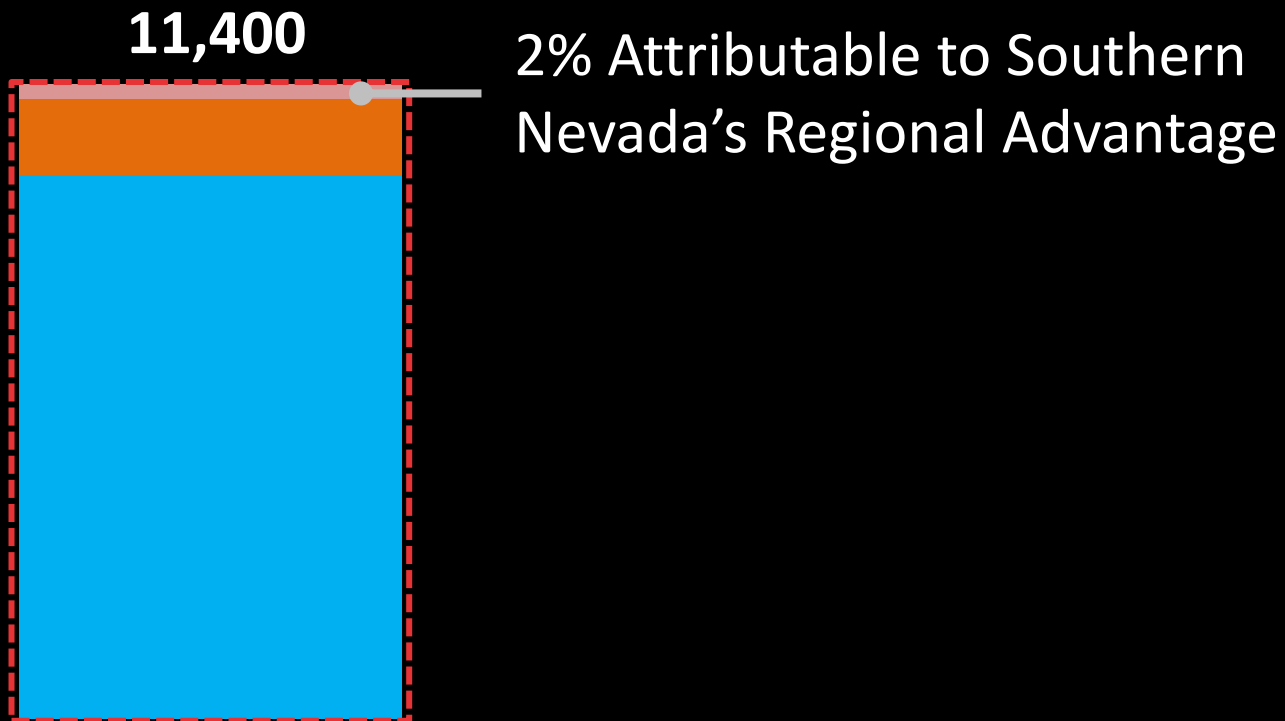


If Economic Development Is Nevada's New Economy,

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Sources of Employment Growth 2010 - 2011



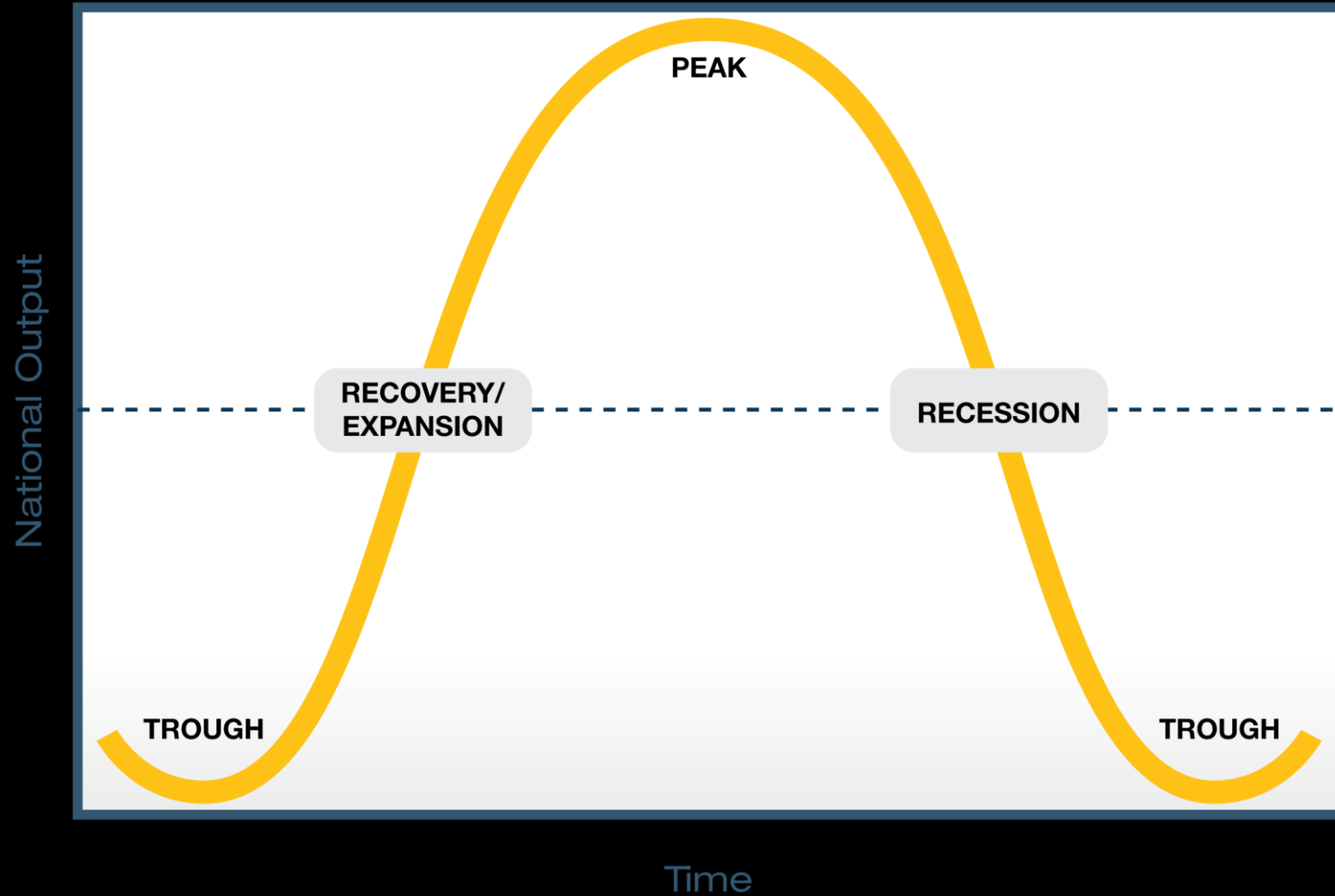
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Phases of the Business Cycle



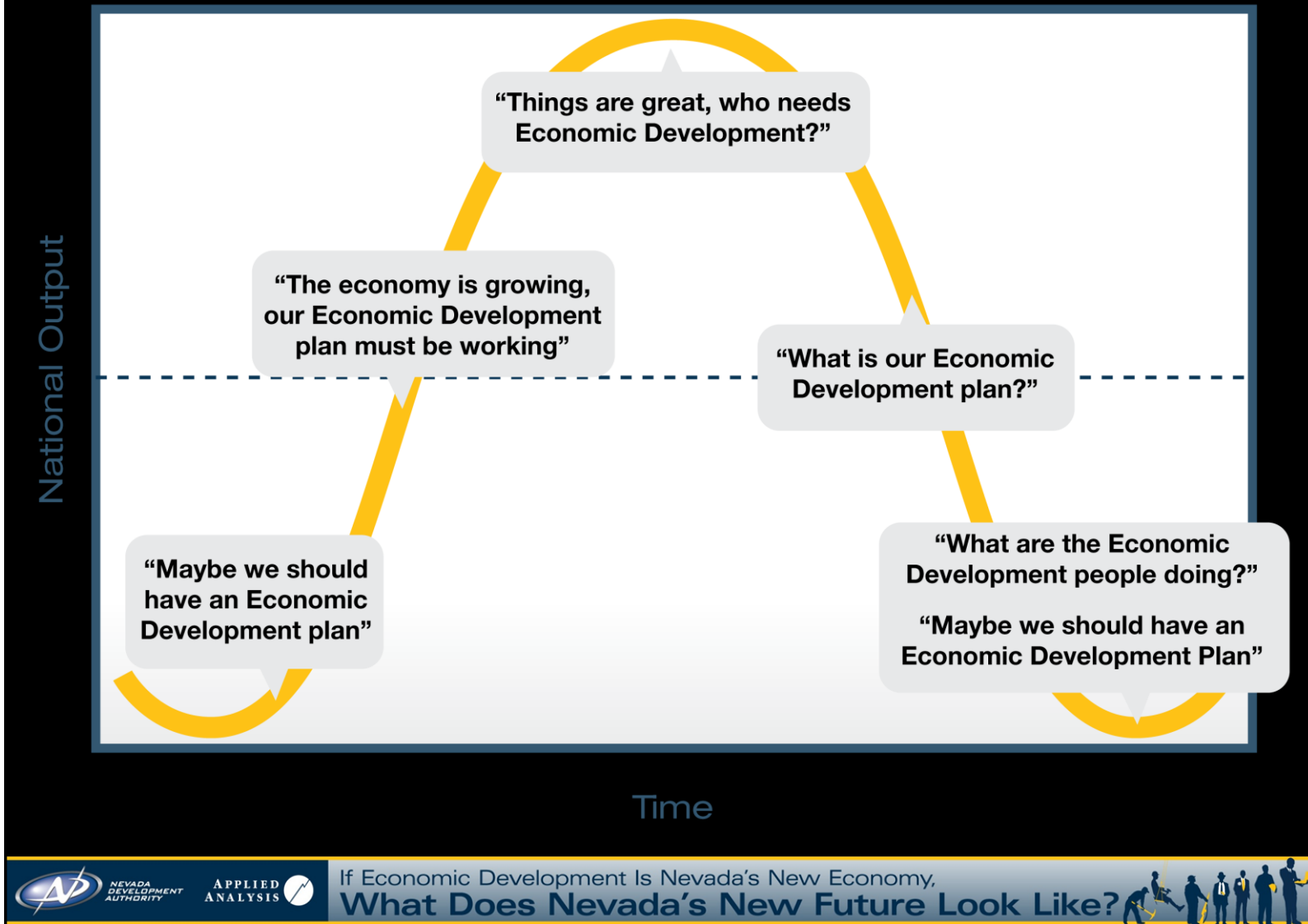
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If Economic Development Is Nevada's New Economy,

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Phases of the Business Cycle





What Does Economic Development Success Look Like?

Might It Have...



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If Economic Development Is Nevada's New Economy,

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cost to create
a single job

cost to pay
unemployment



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If Economic Development Is Nevada's New Economy,

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If Economic Development Is Nevada's New Economy,
What Does Nevada's New Future Look Like? 

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What is Nevada's Economic Development Plan

and How Does It Differ From Our Old Economic Development Plan?



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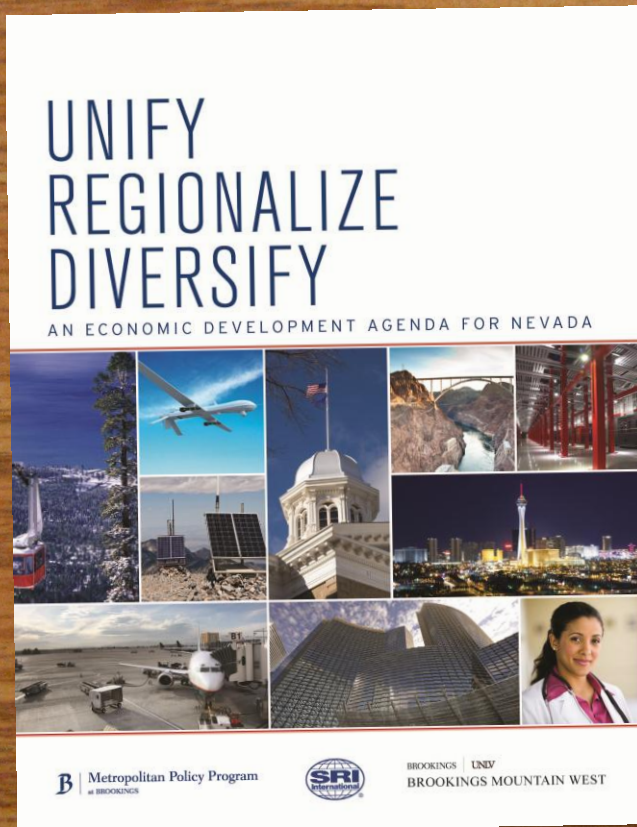
What Does Nevada's New Future Look Like?



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Conclusions *from the Brookings/SRI Study*



“Nevada possesses fundamental economic assets along with serious challenges as it seeks to build the next Nevada economy.”



APPLIED ANALYSIS

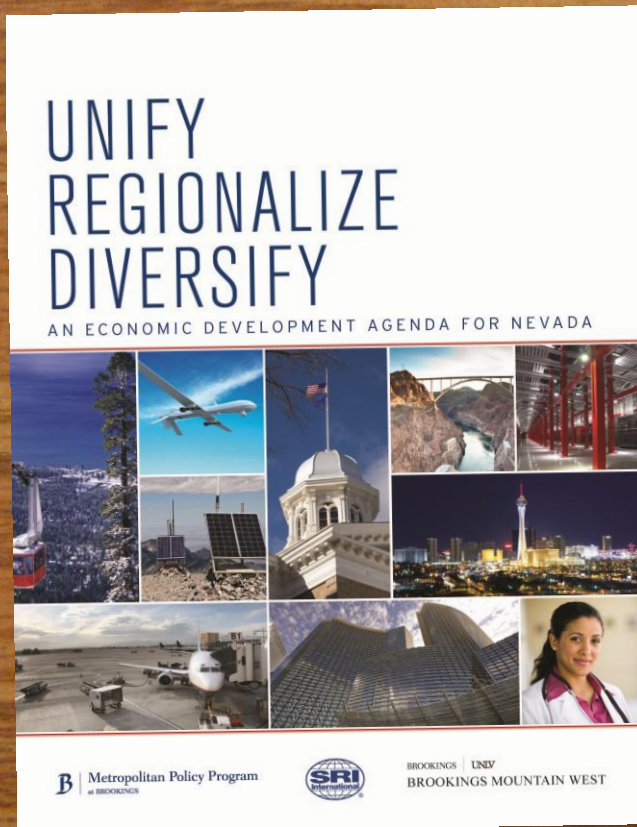


If Economic Development Is Nevada's New Economy,

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Conclusions *from the Brookings/SRI Study*



“Seven major industries...hold out plausible potential for economic growth and diversification for Nevada.”



APPLIED ANALYSIS

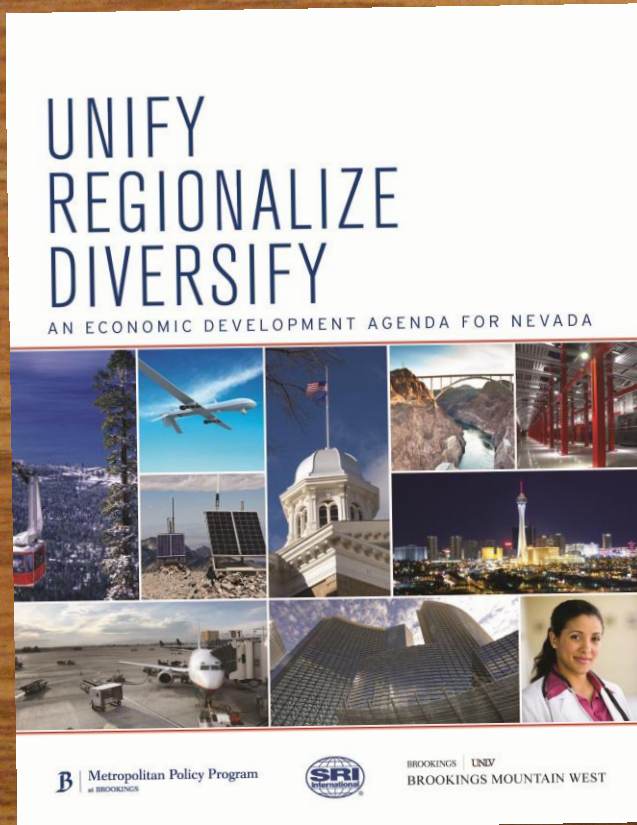


If Economic Development Is Nevada's New Economy,

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Conclusions *from the Brookings/SRI Study*



Recommended Industries:

- 1) **Tourism, Gaming and Entertainment**
- 2) **Health and Medical Services**
- 3) **Business IT Ecosystems**
- 4) **Clean Energy**
- 5) **Mining, Materials and Manufacturing**
- 6) **Logistics and Operations**
- 7) **Aerospace and Defense**



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If Economic Development Is Nevada's New Economy,

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Fundamental Question

Are Businesses Not
Investing in Nevada Because
They Don't Know Us?

Or Because They Do?



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If Economic Development Is Nevada's New Economy,

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\$34.6

\$501



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If Economic Development Is Nevada's New Economy,

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Economic Development
Begins with Introspection



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CCSD



CLARK COUNTY

SCHOOL DISTRICT



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UNLV

UNIVERSITY OF NEVADA LAS VEGAS



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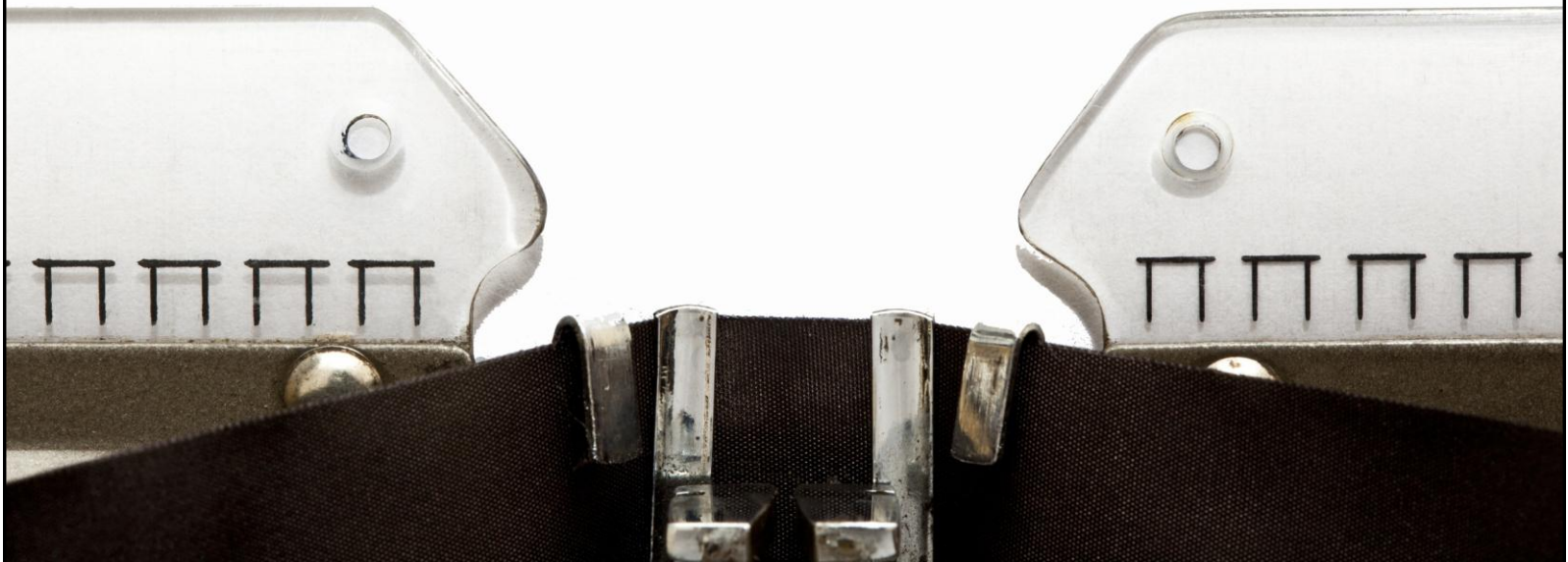


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I am upside down on my house
by \$100,000...



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If Economic Development Is Nevada's New Economy,

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or better yet, I just walked away
from my house so now I am free
and clear...



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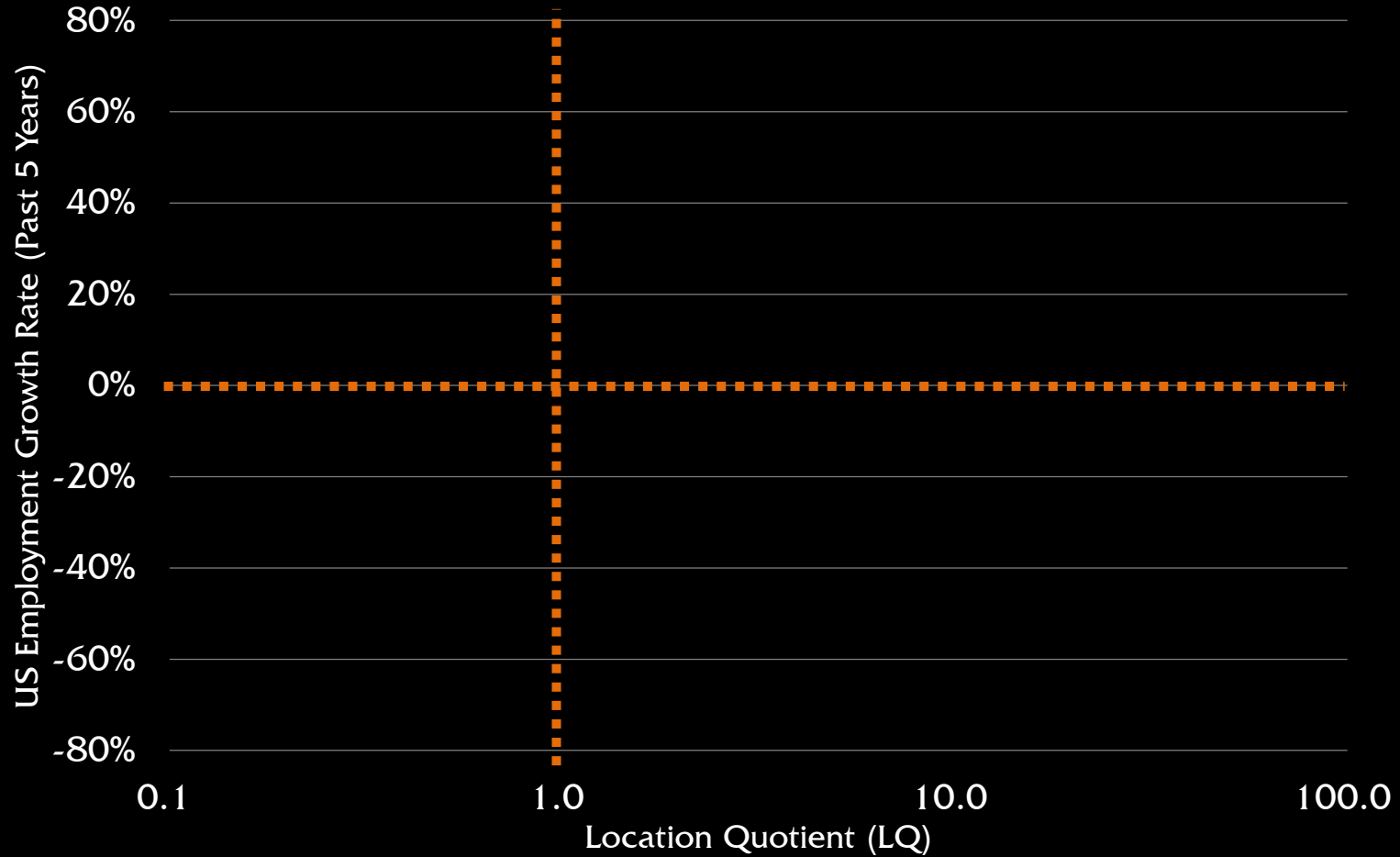
That said, I have a great business
idea, would you lend me the money
to get started?



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LQ vs. National Employment Growth Rates

Las Vegas MSA by Occupation



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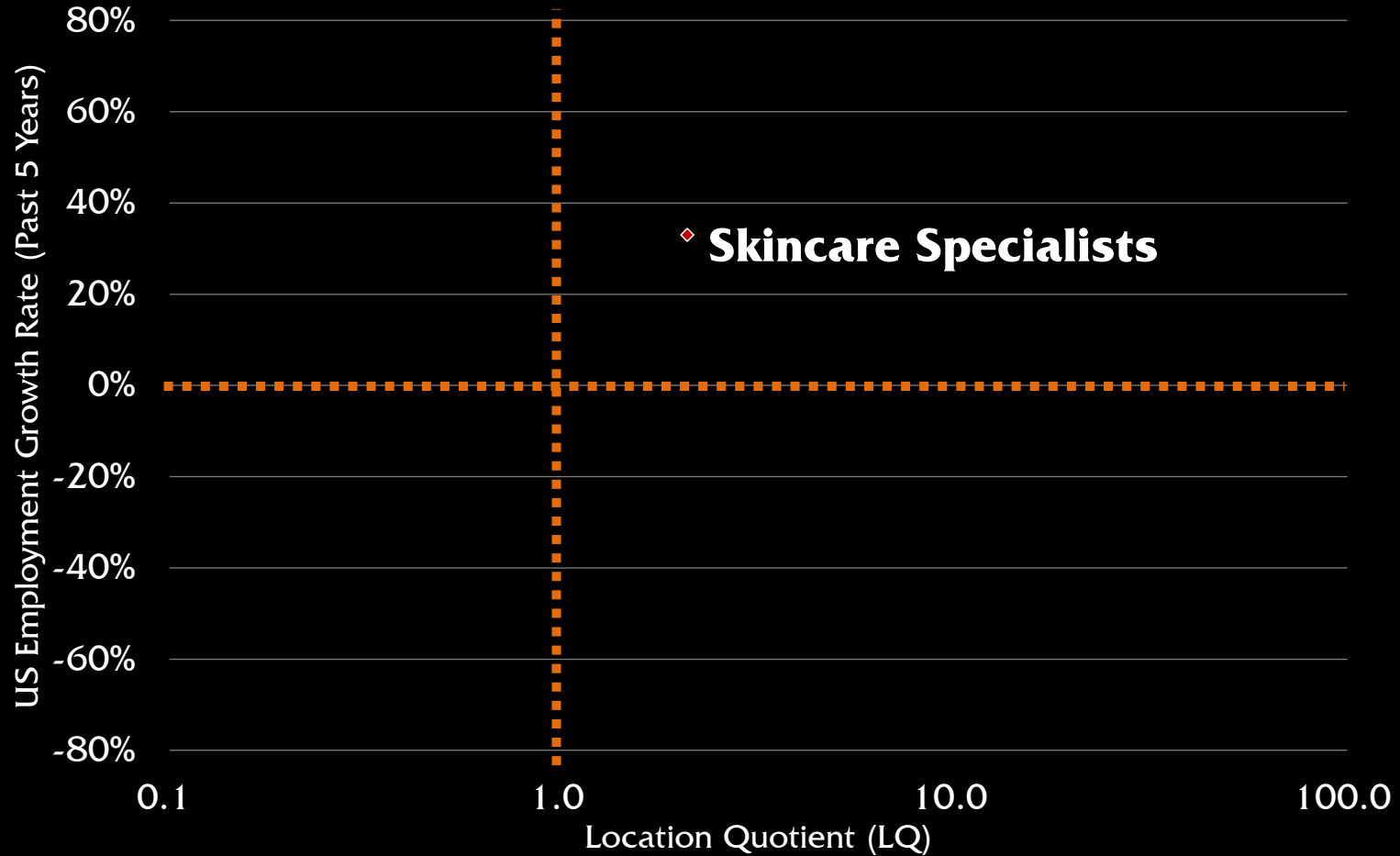
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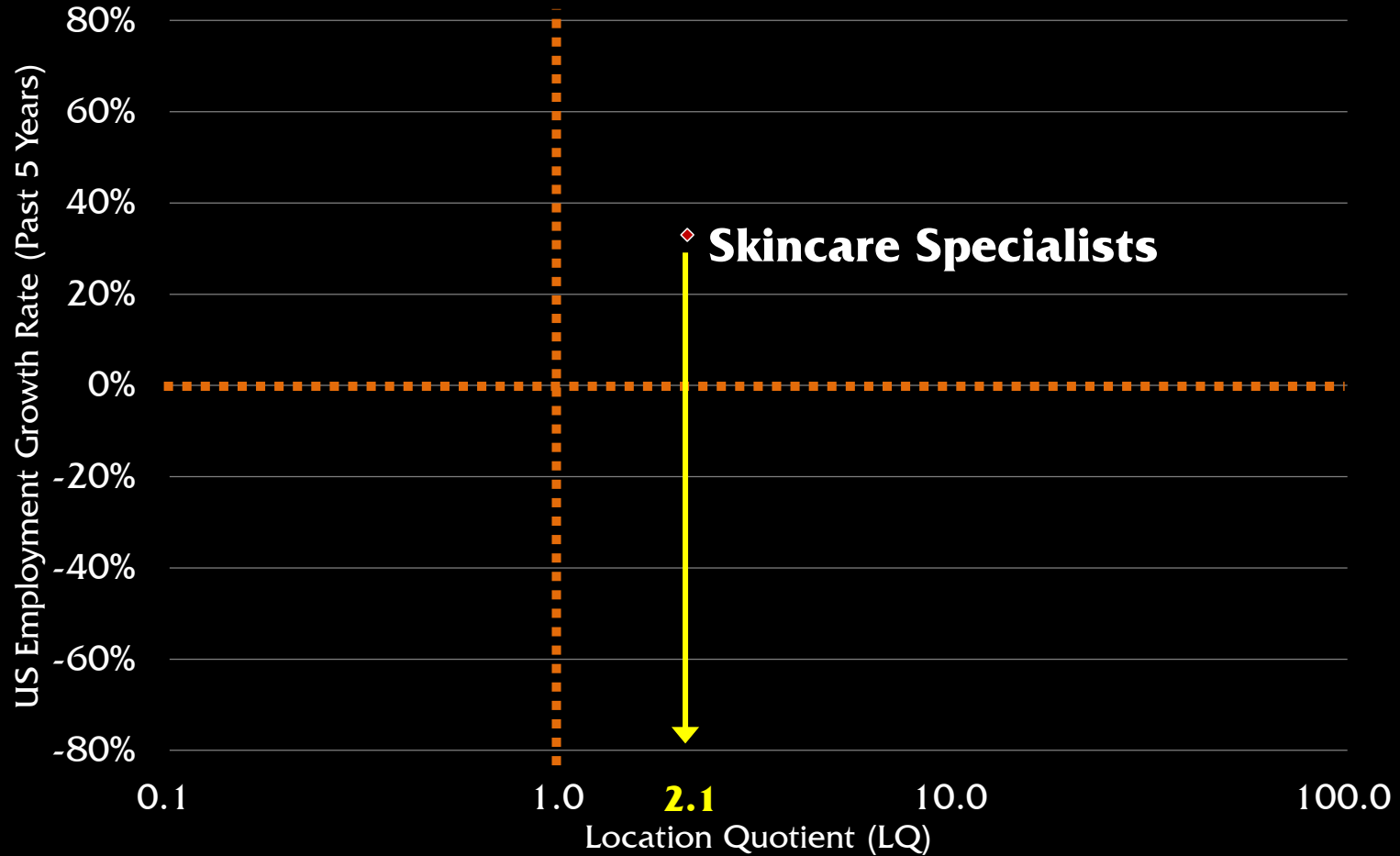


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LQ vs. National Employment Growth Rates

Las Vegas MSA by Occupation



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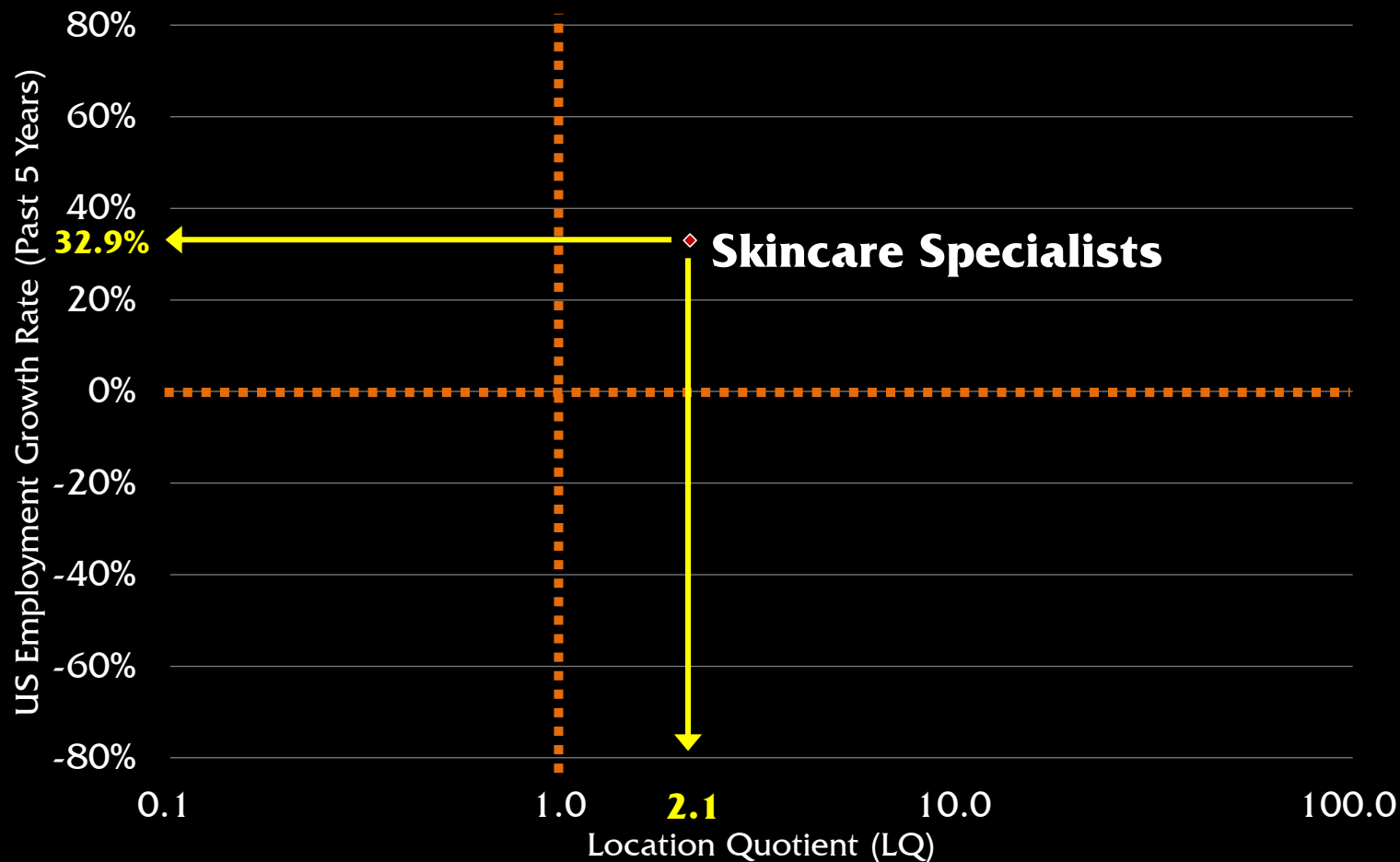
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LQ vs. National Employment Growth Rates

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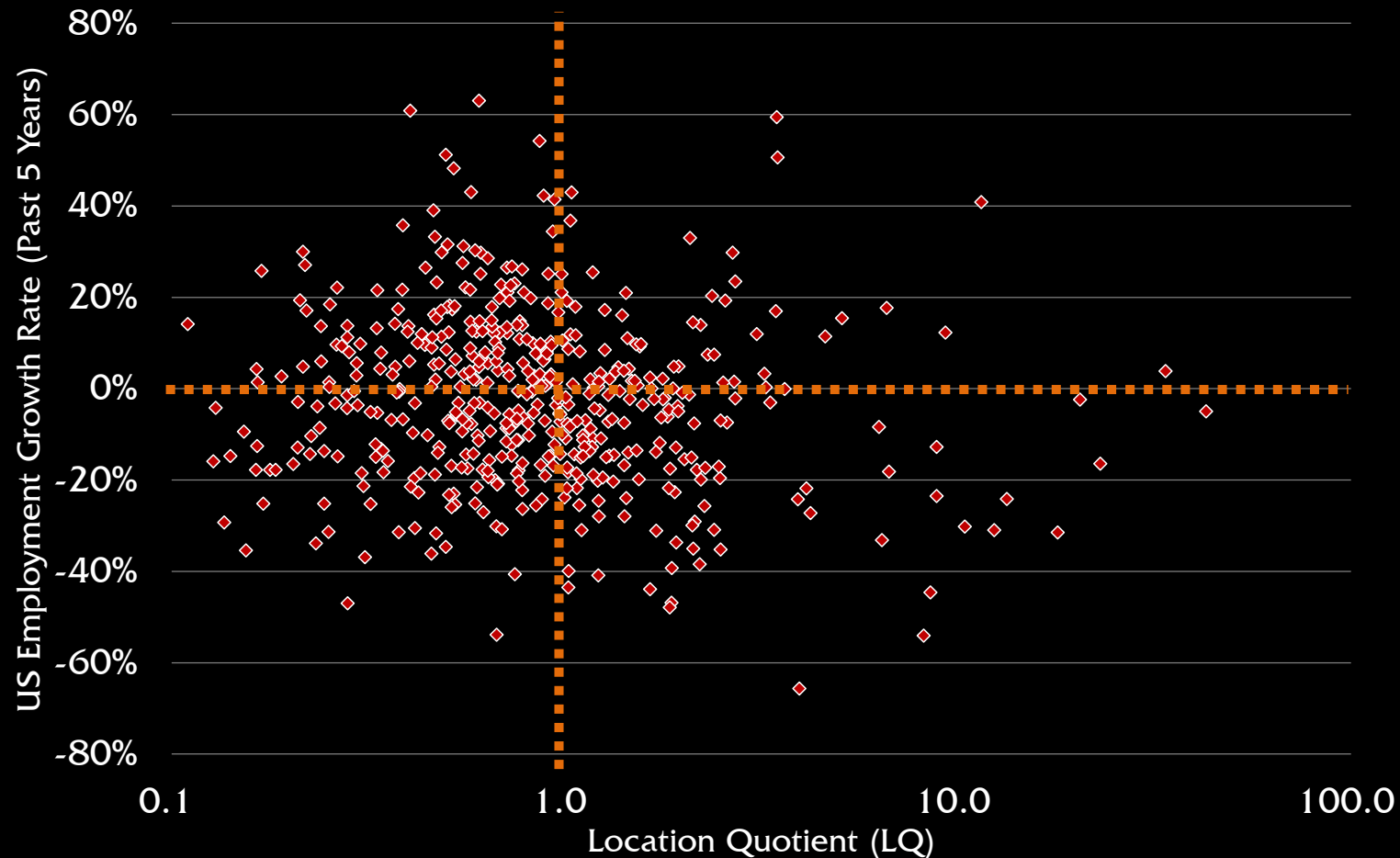


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LQ vs. National Employment Growth Rates

Las Vegas MSA by Occupation



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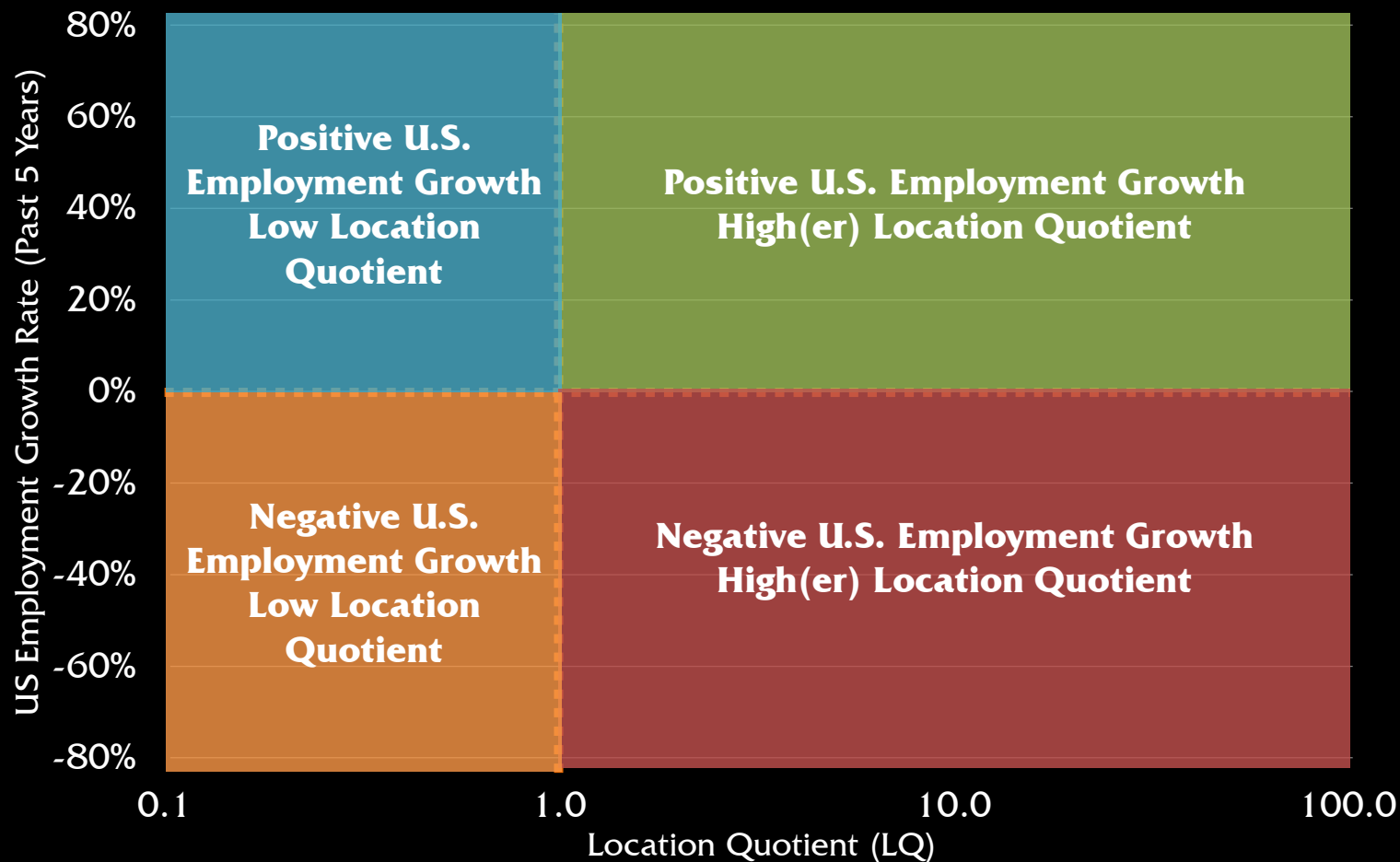
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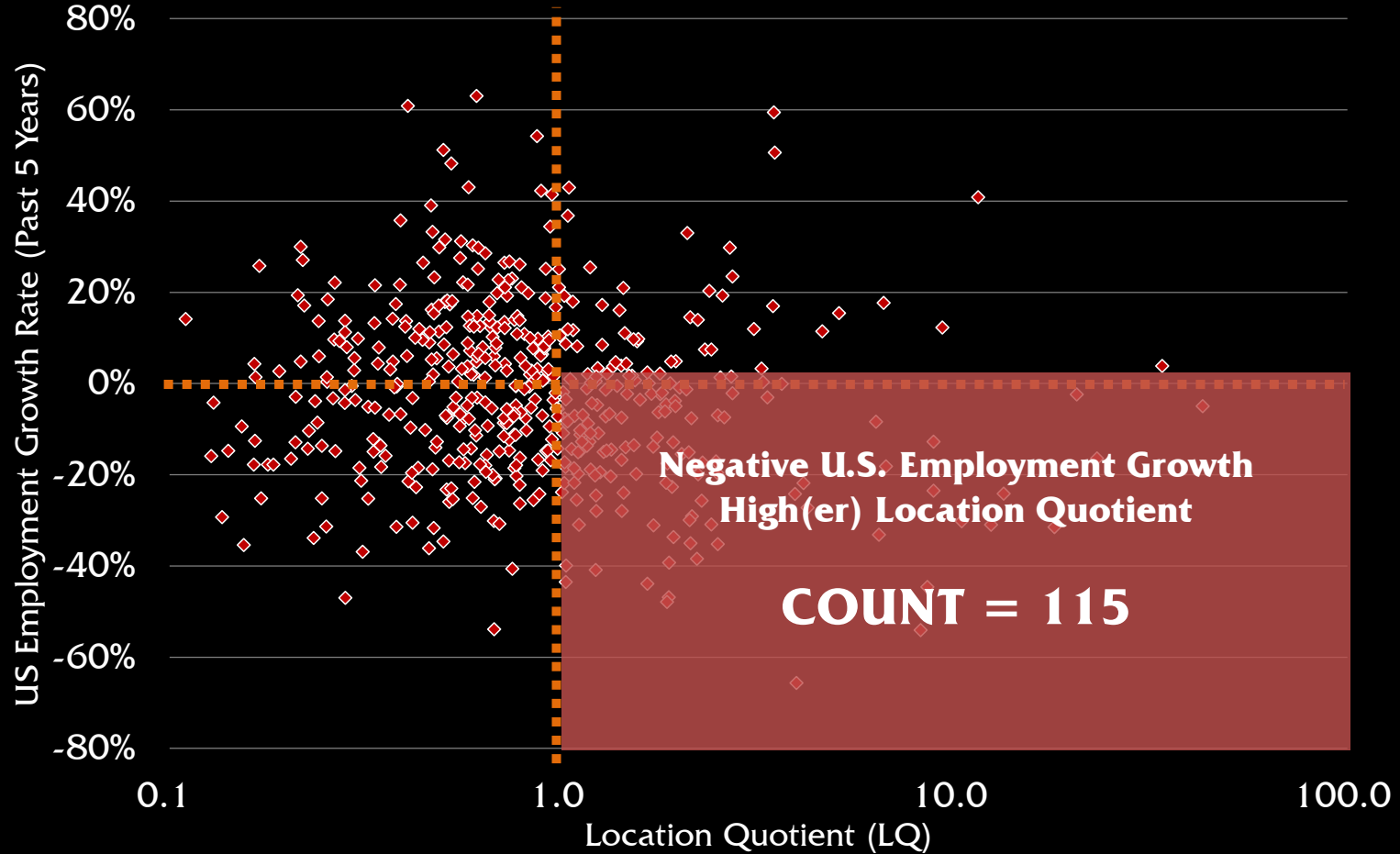


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LQ vs. National Employment Growth Rates

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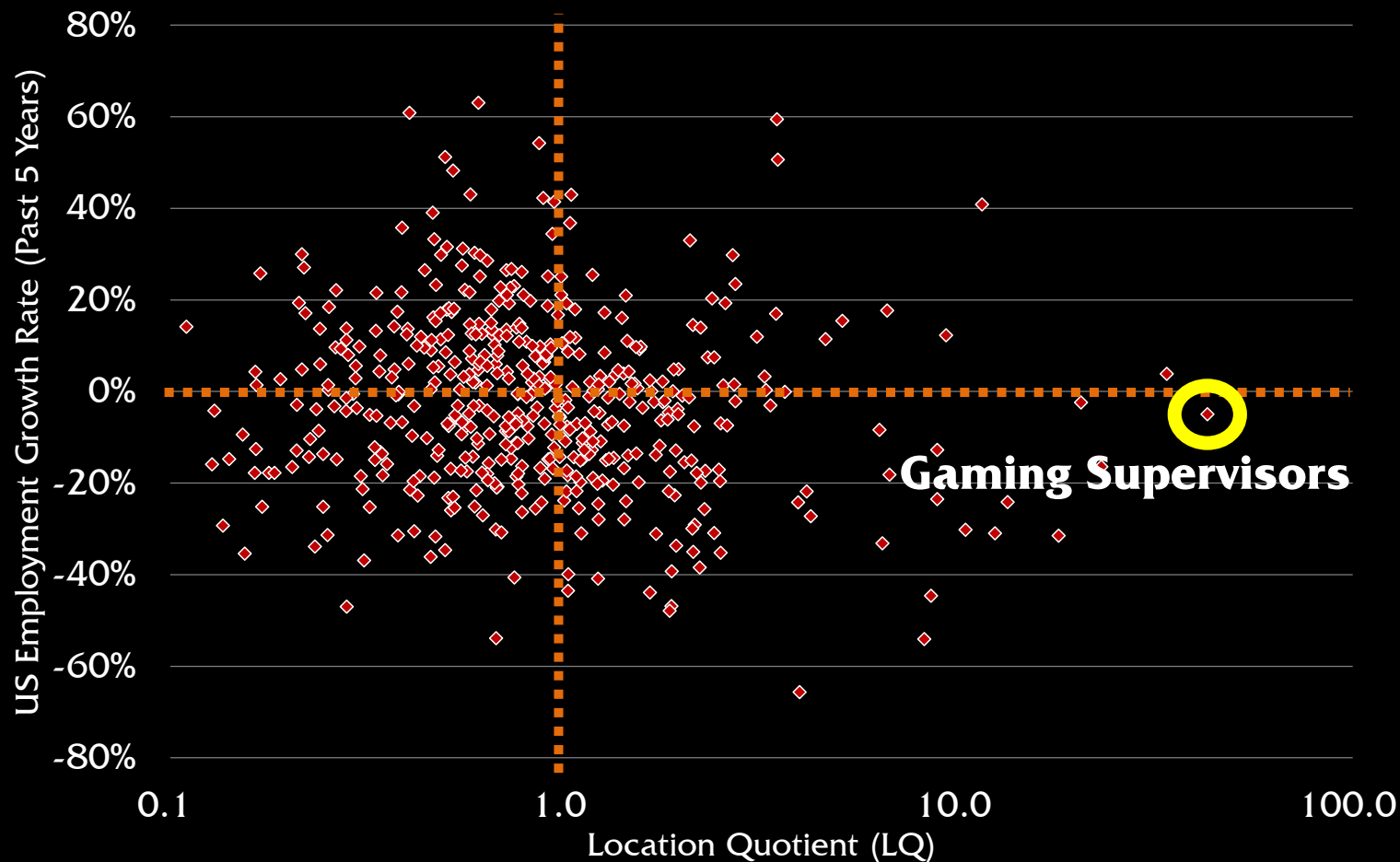


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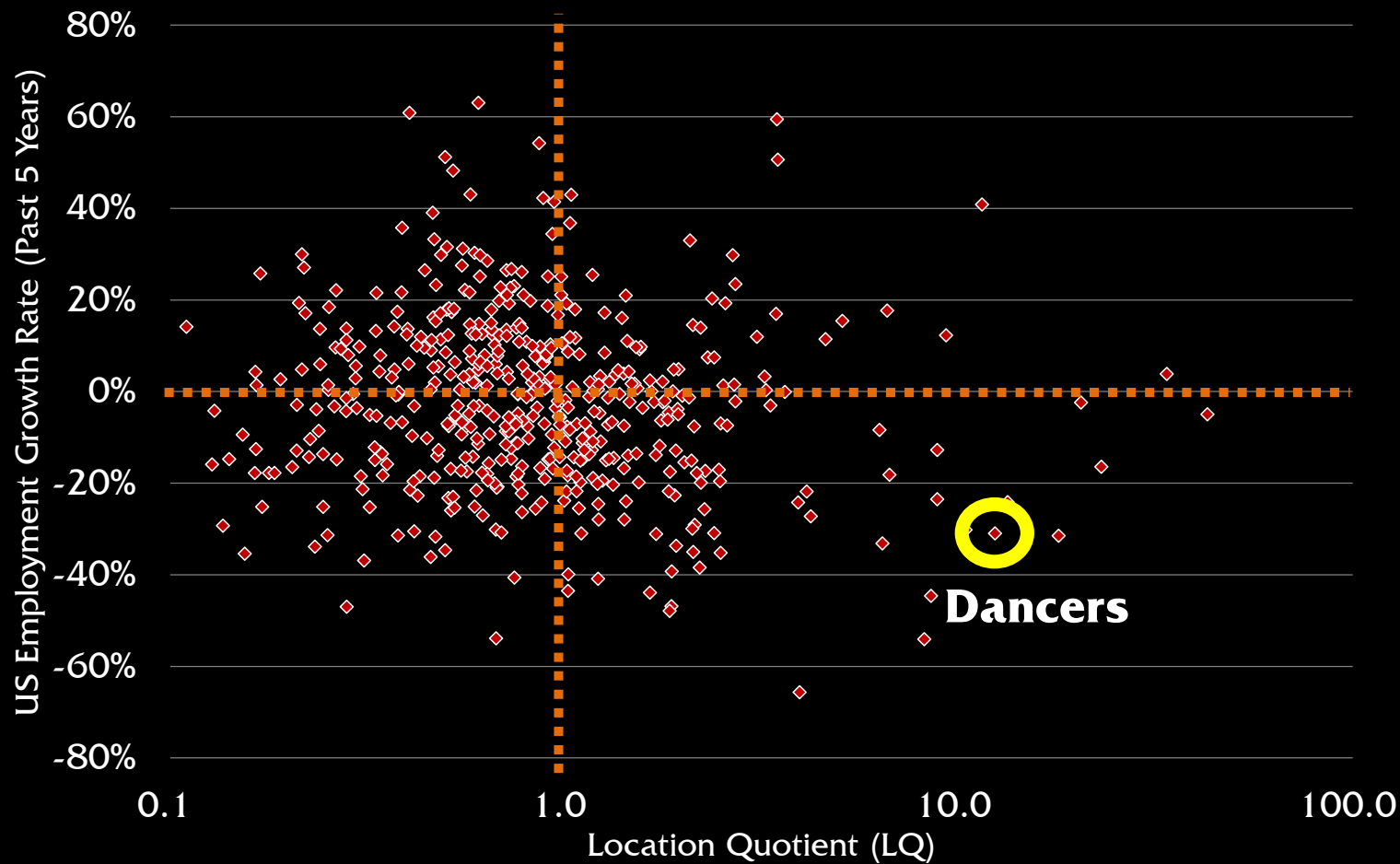


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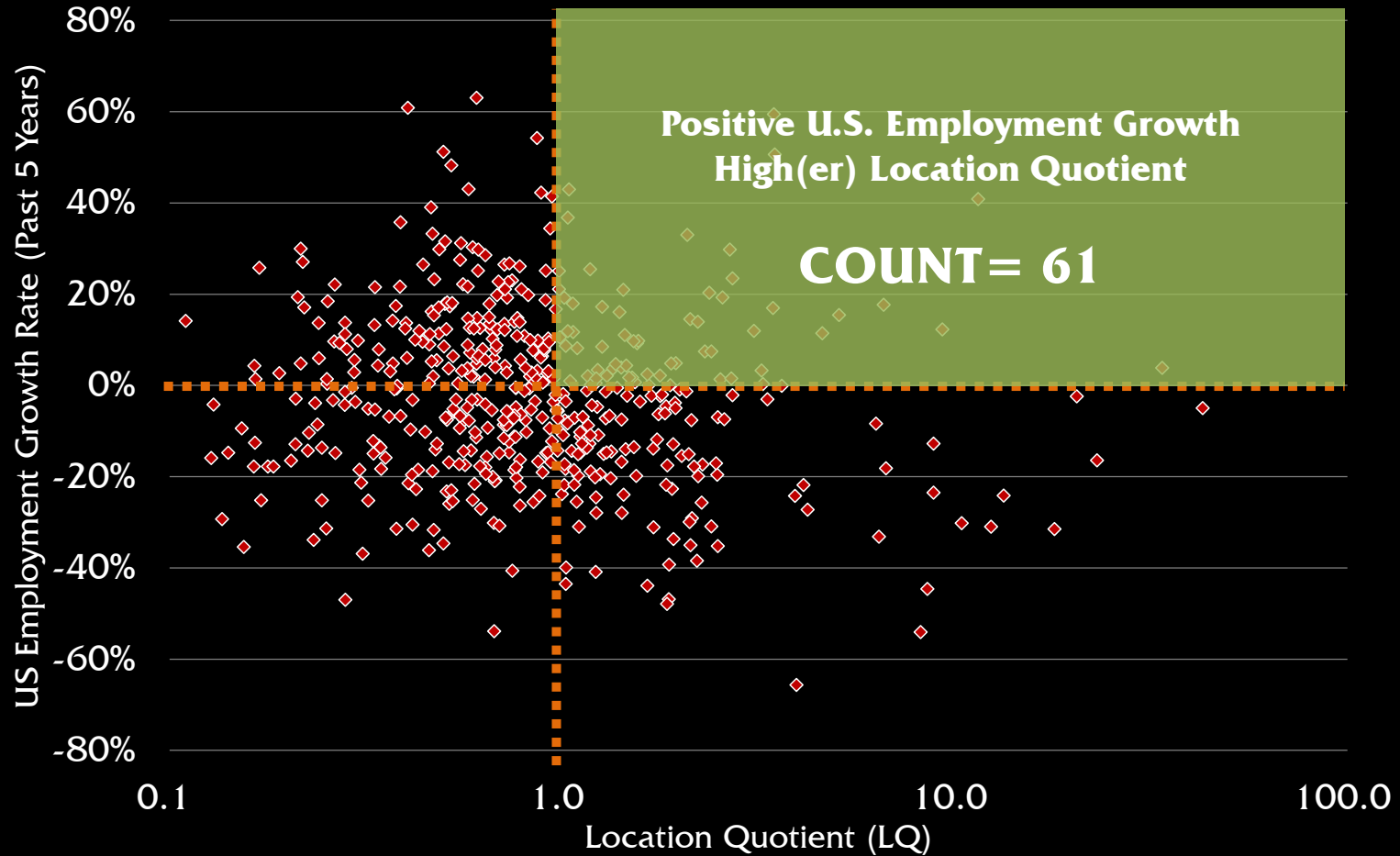


Date of Presentation:

January 19, 2012

LQ vs. National Employment Growth Rates

Las Vegas MSA by Occupation



APPLIED ANALYSIS

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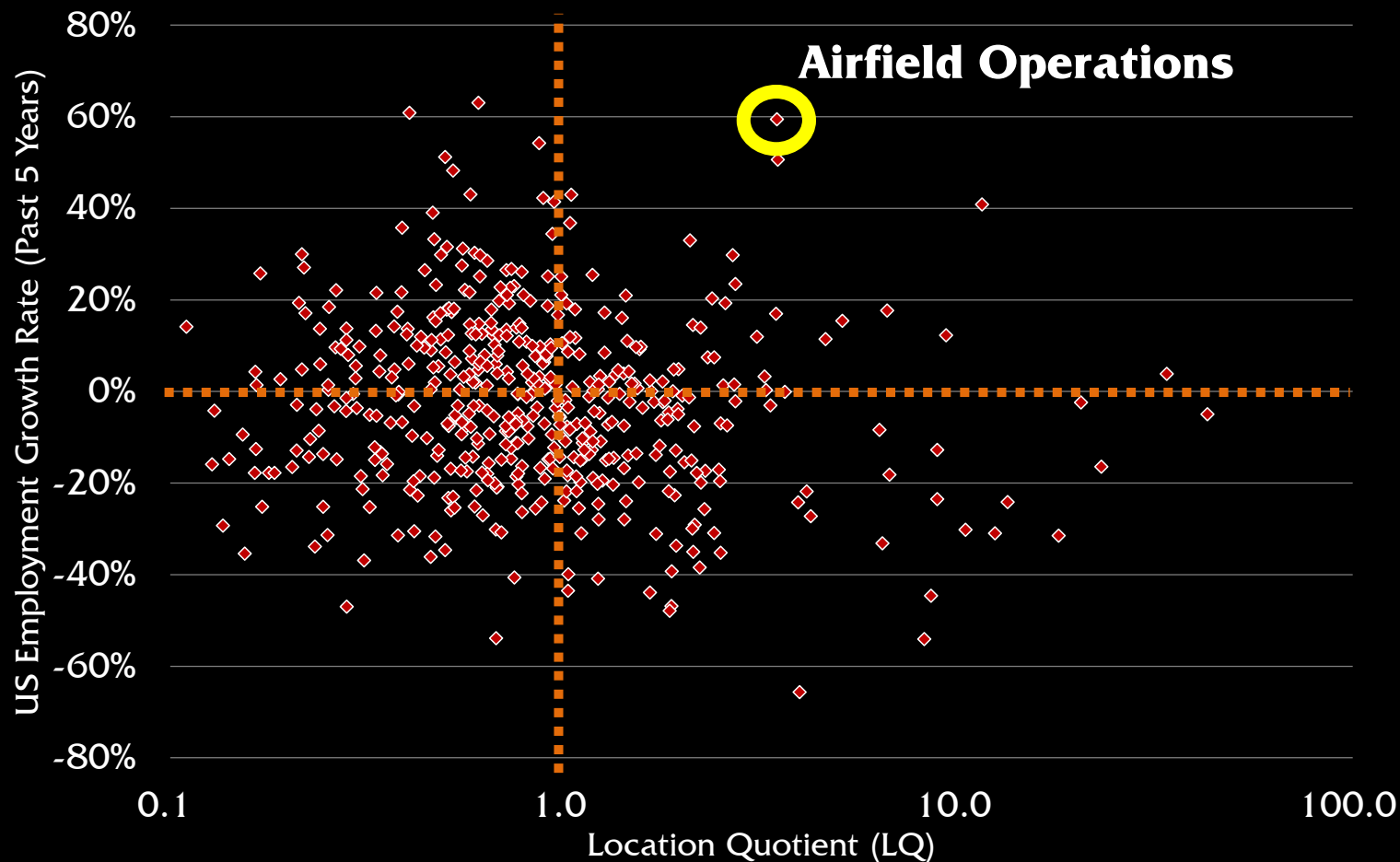


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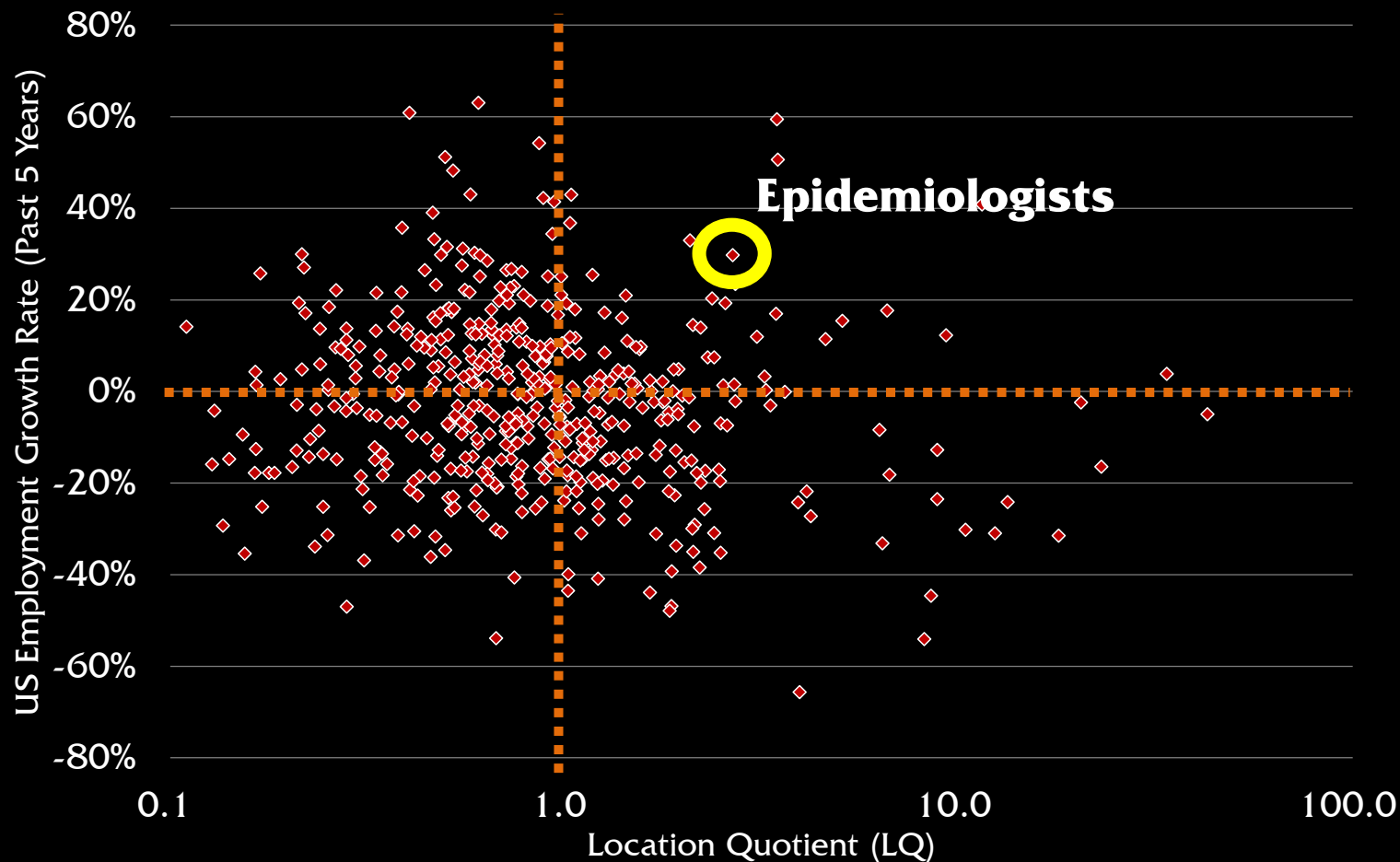


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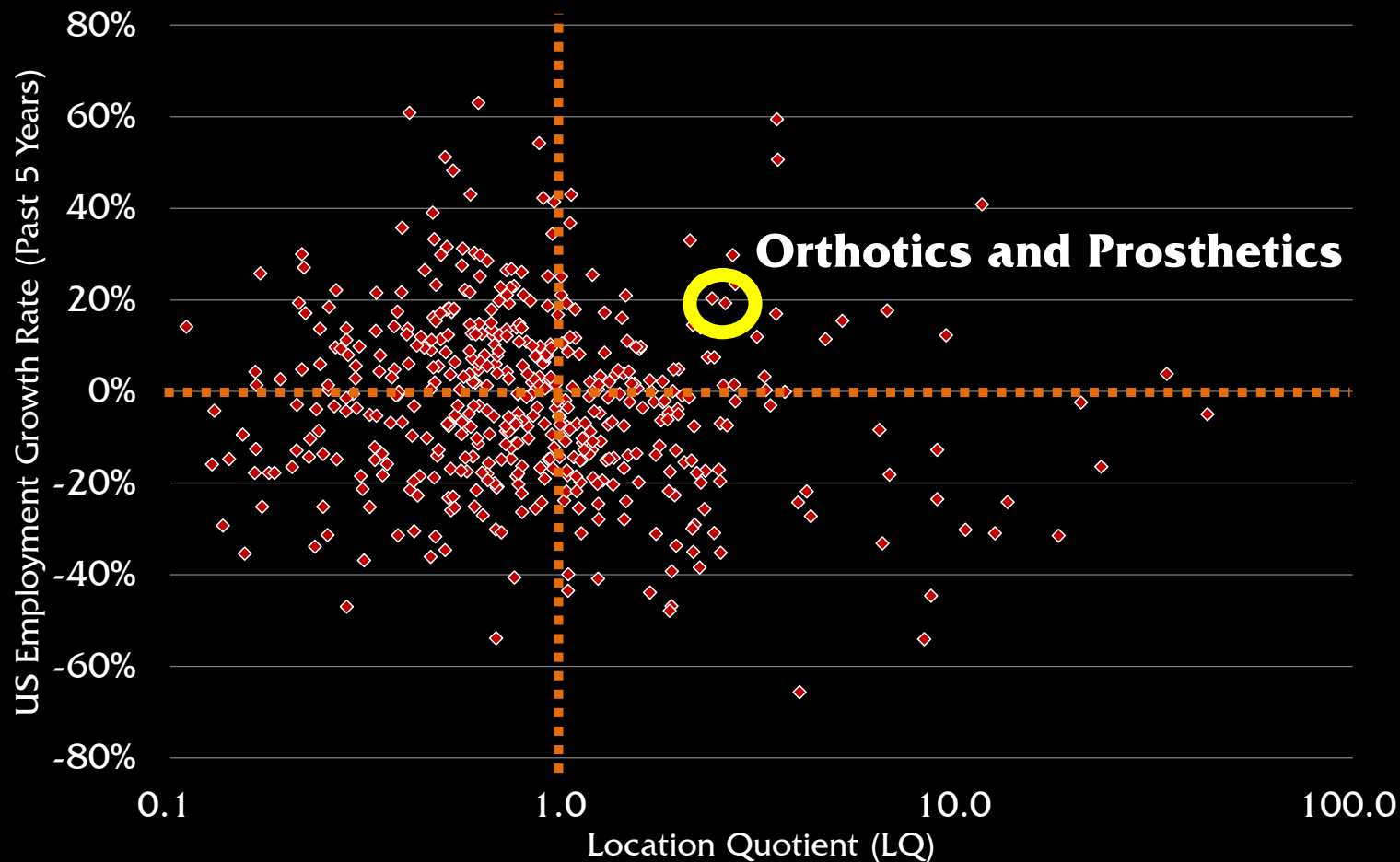


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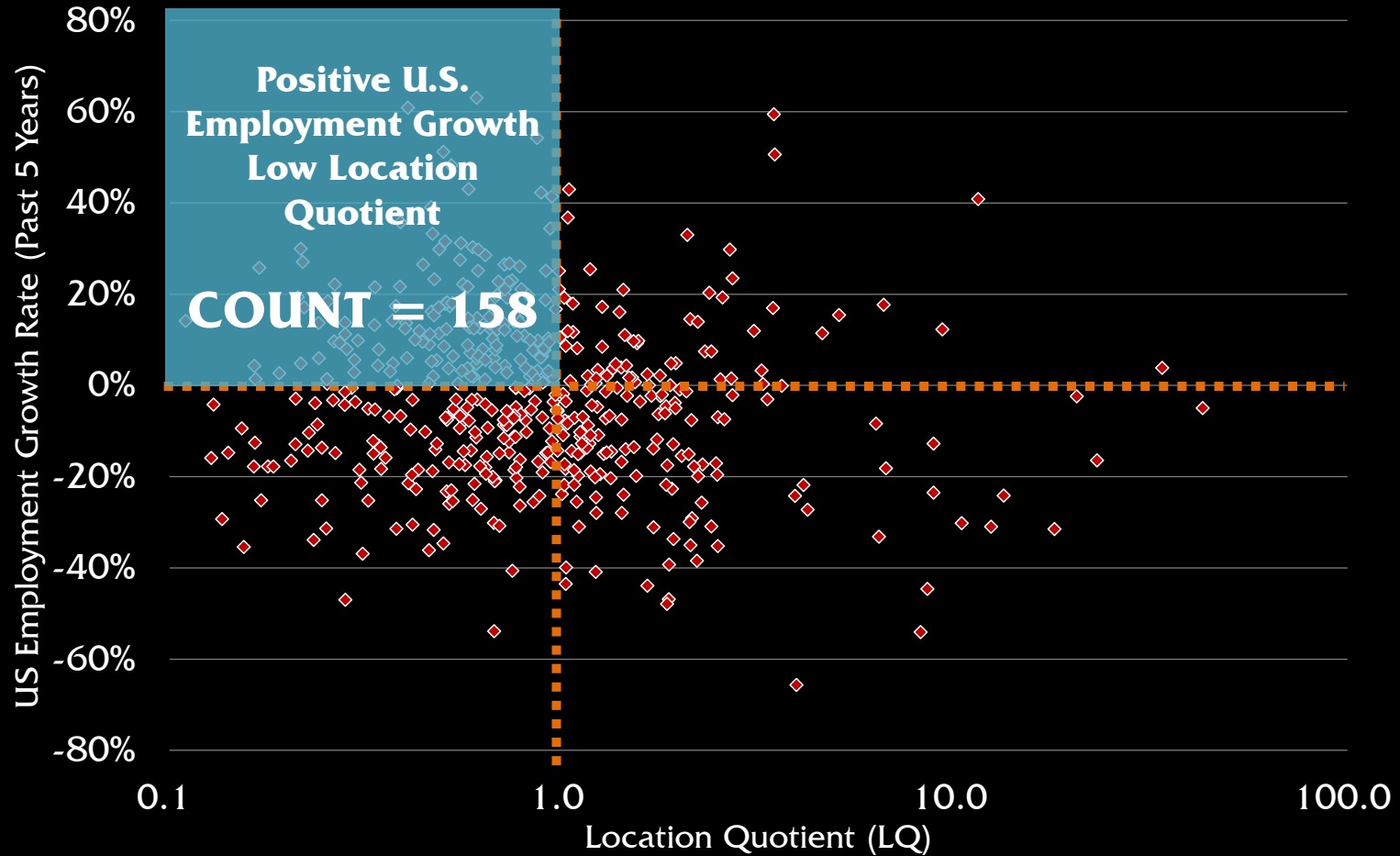


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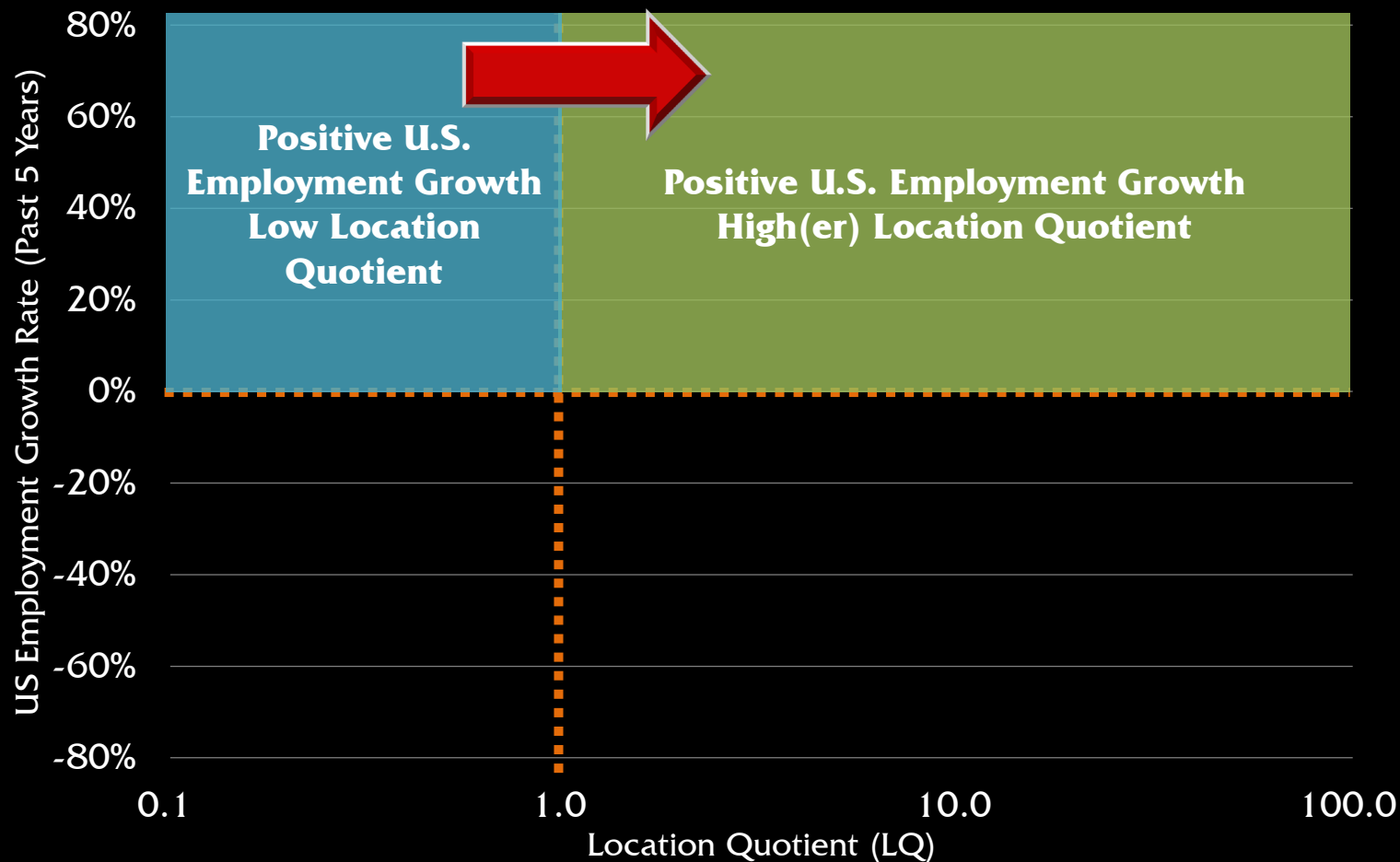


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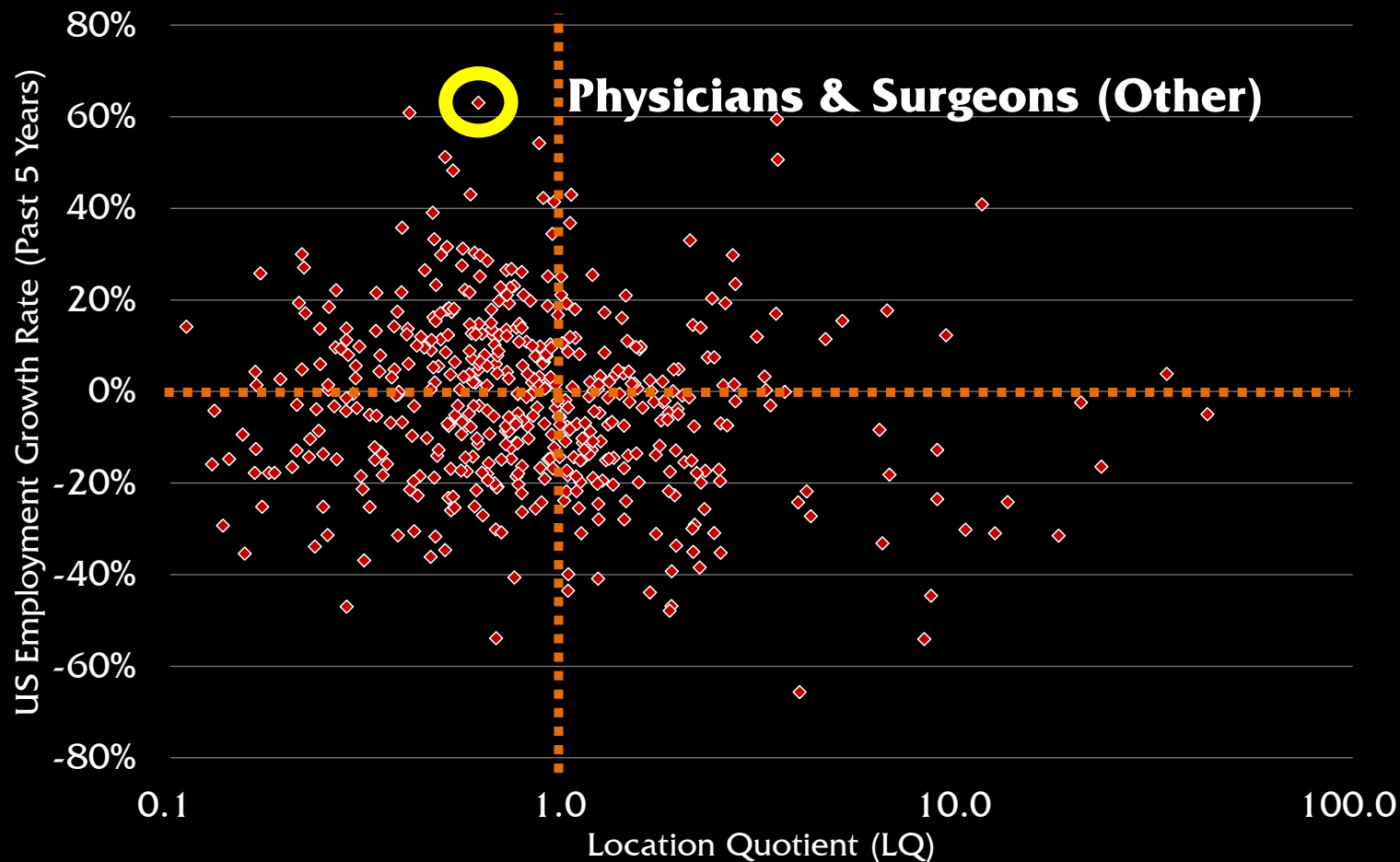


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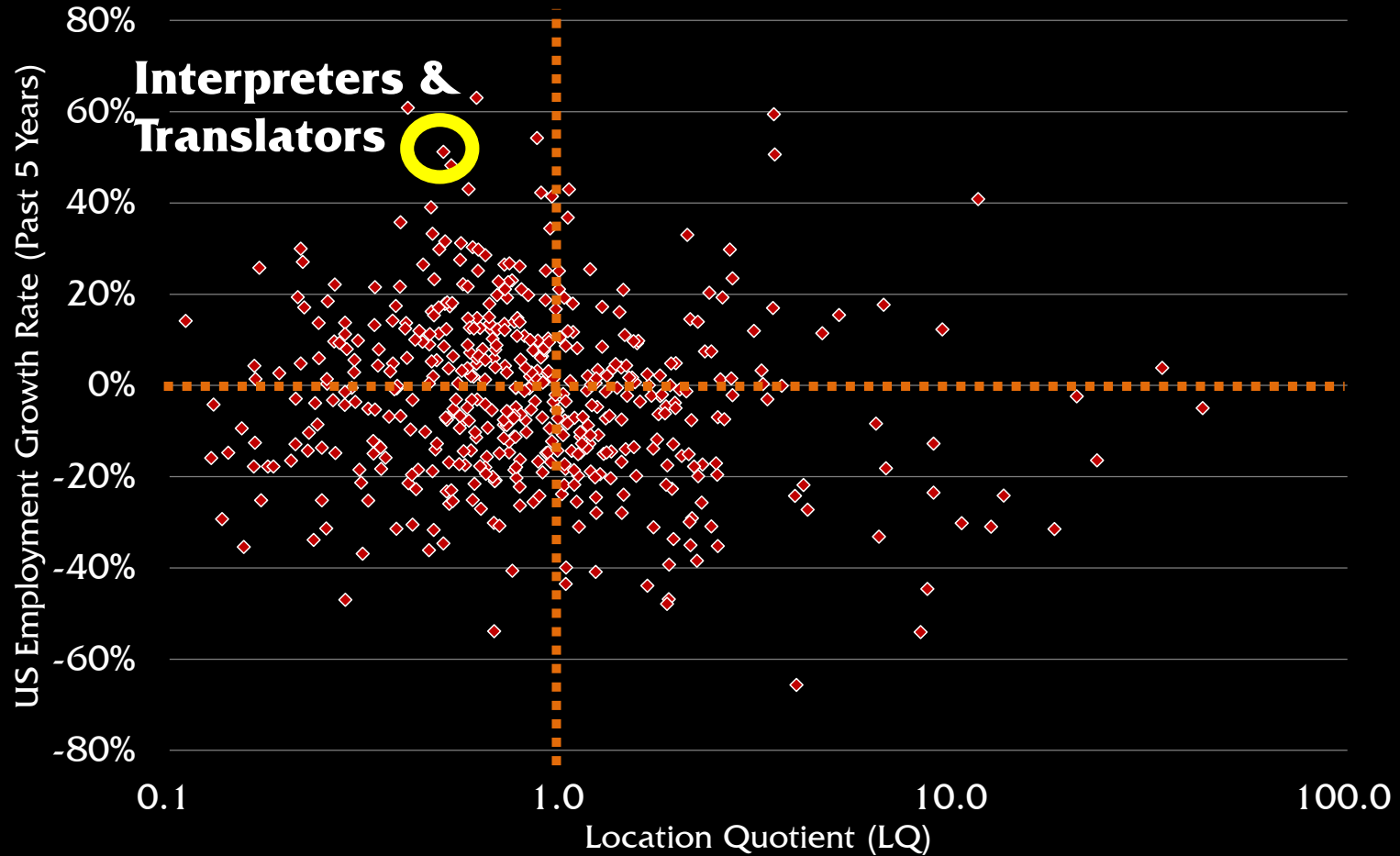


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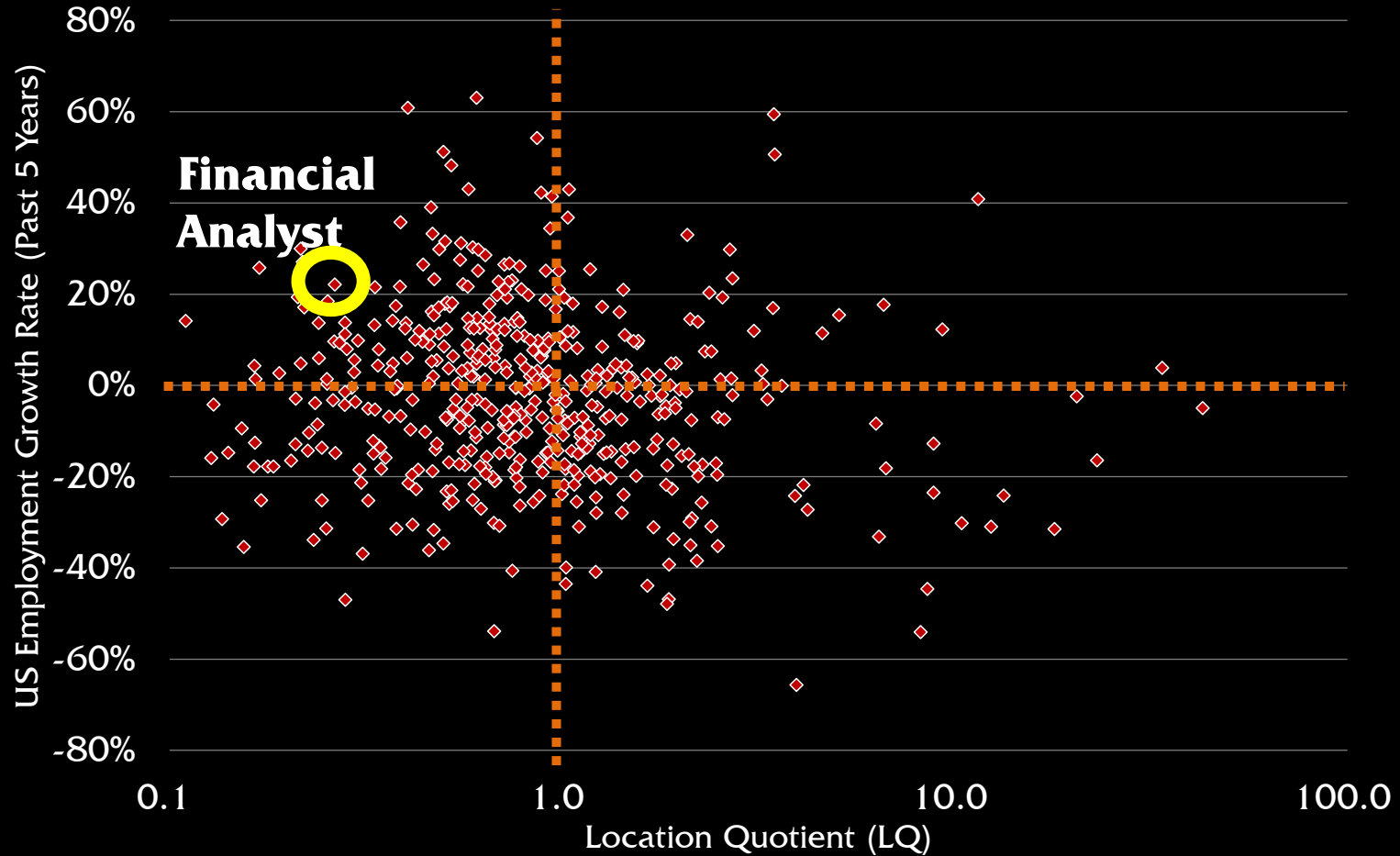


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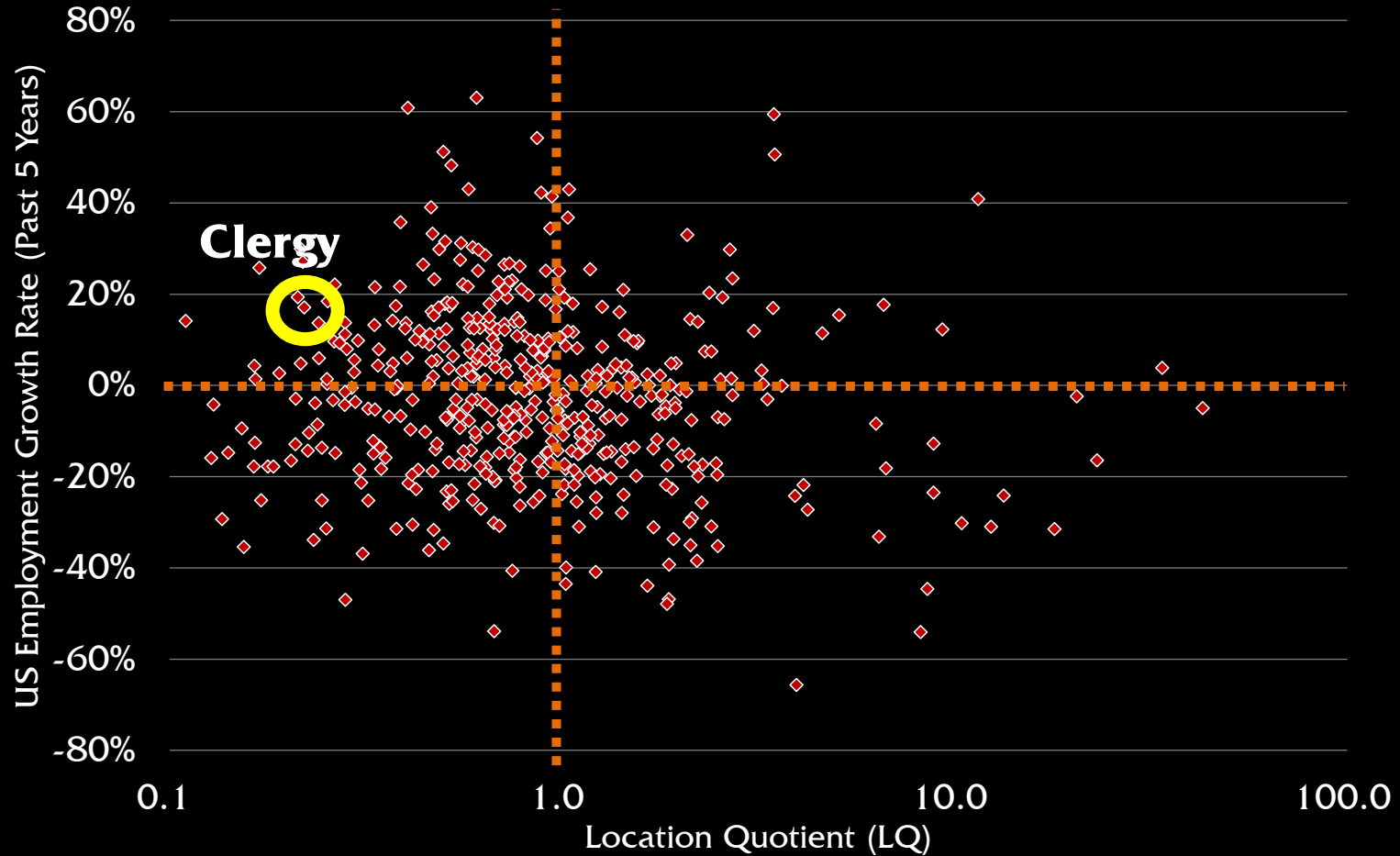


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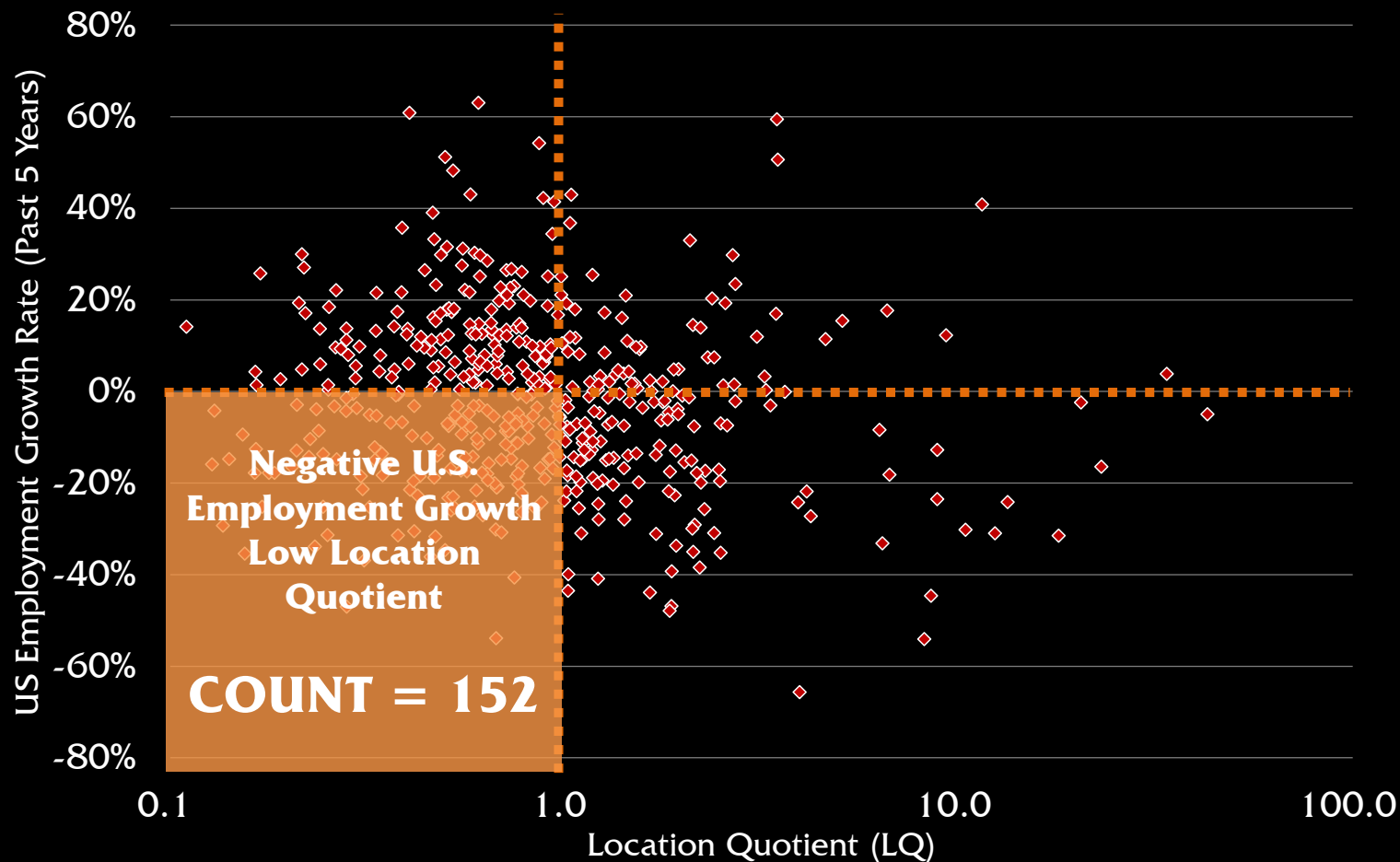
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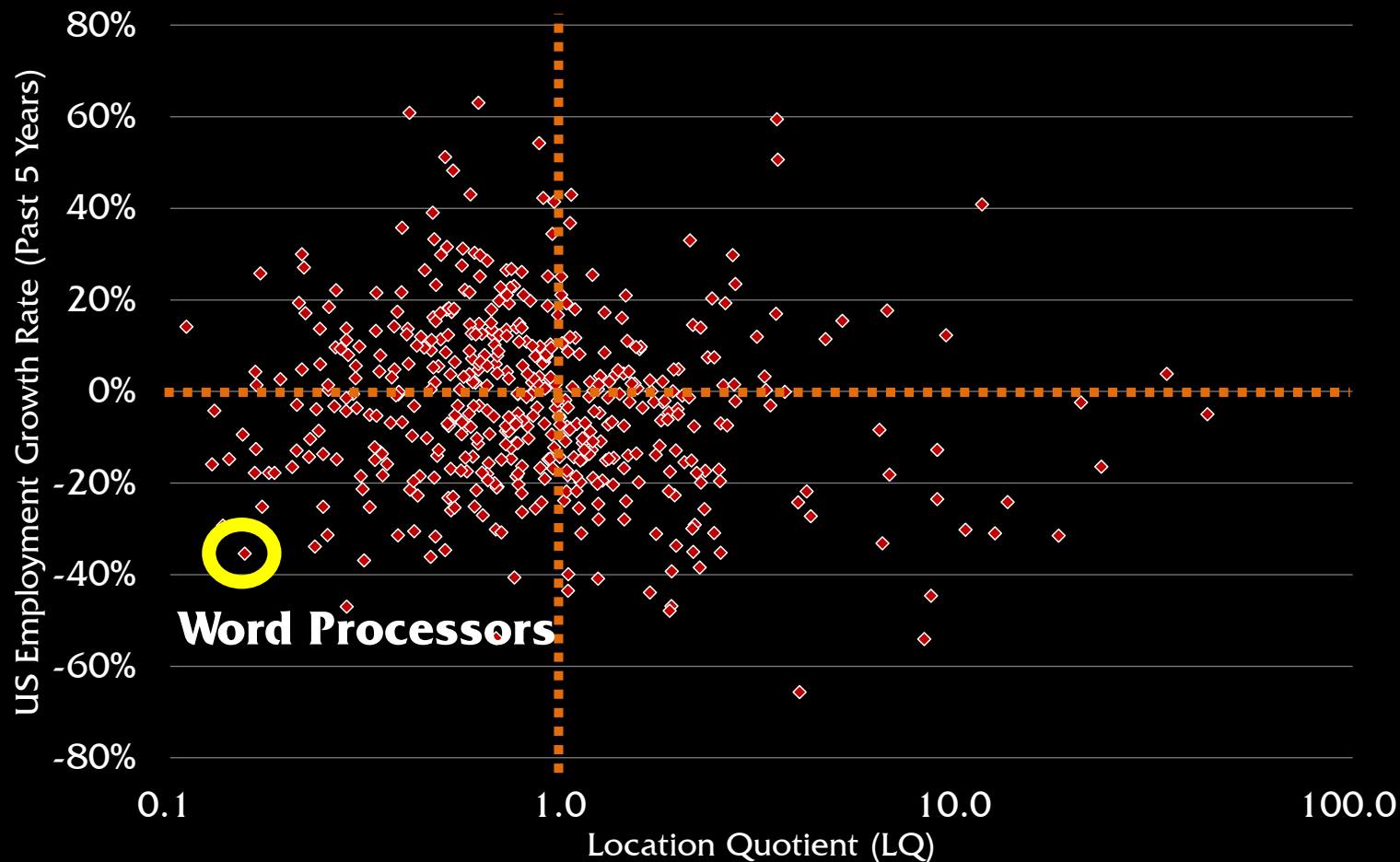


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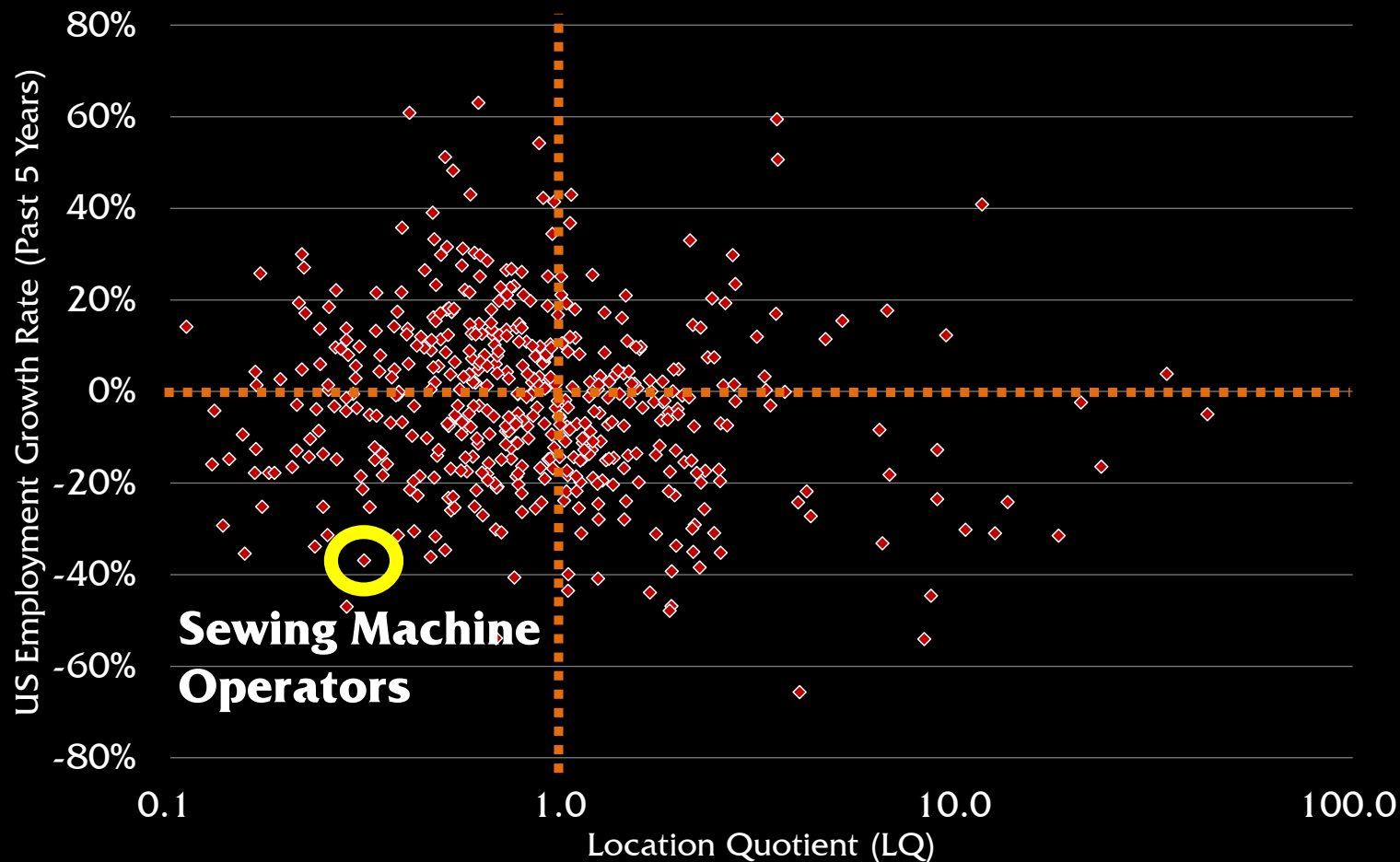


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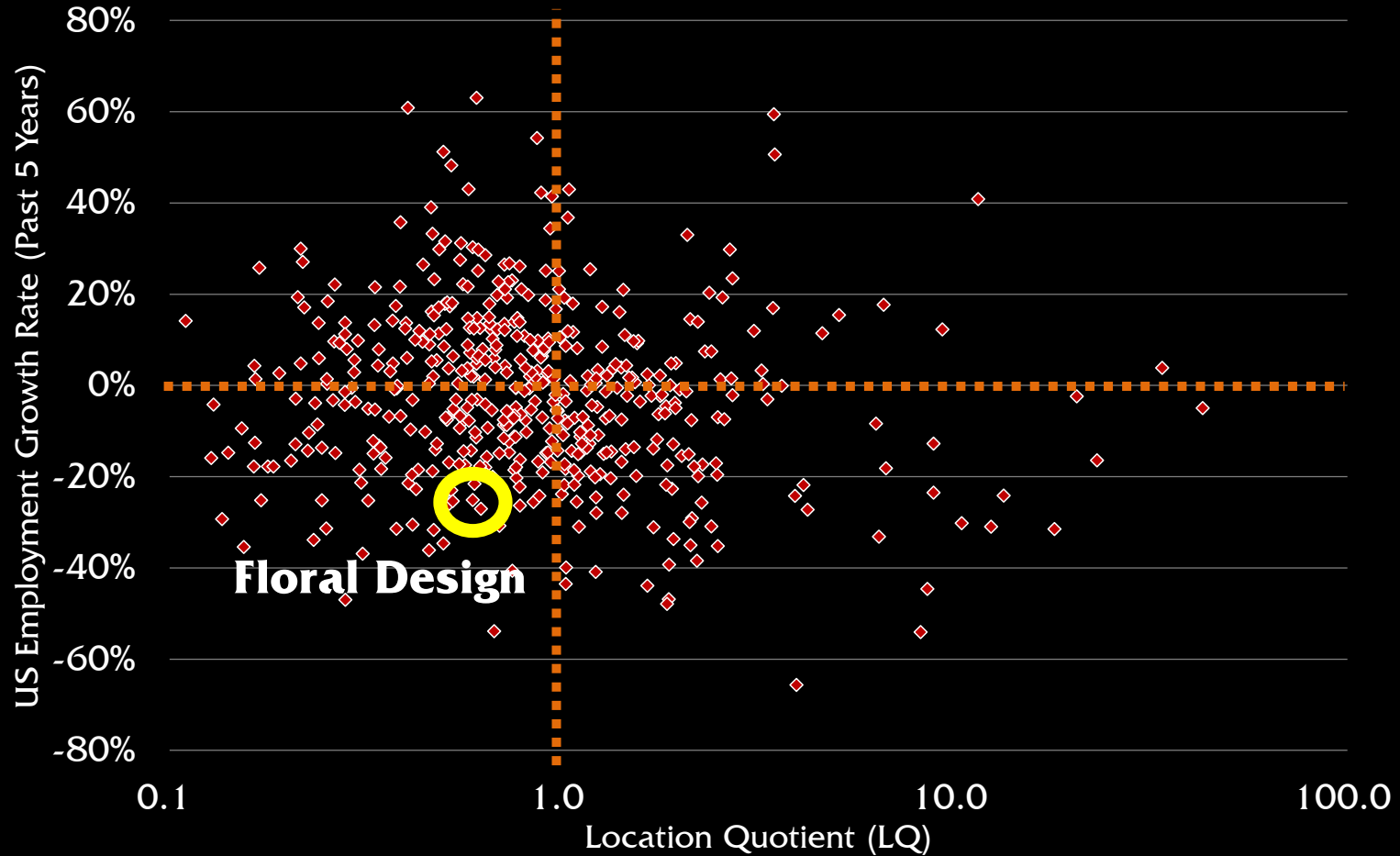


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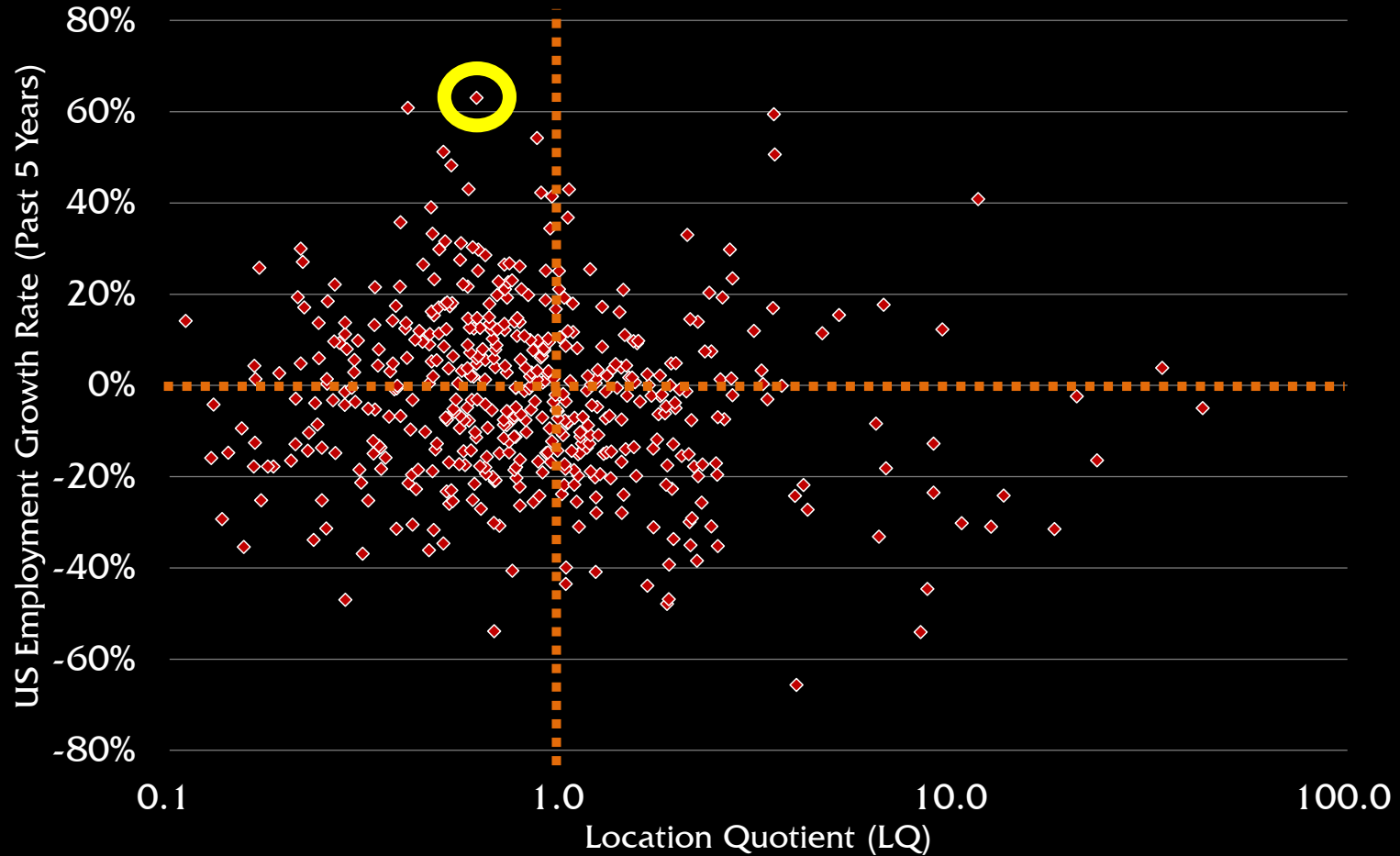
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APPLIED ANALYSIS

If Economic Development Is Nevada's New Economy,

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WELCOME TO

**Phoenix
Arizona**



APPLIED ANALYSIS



If Economic Development Is Nevada's New Economy,

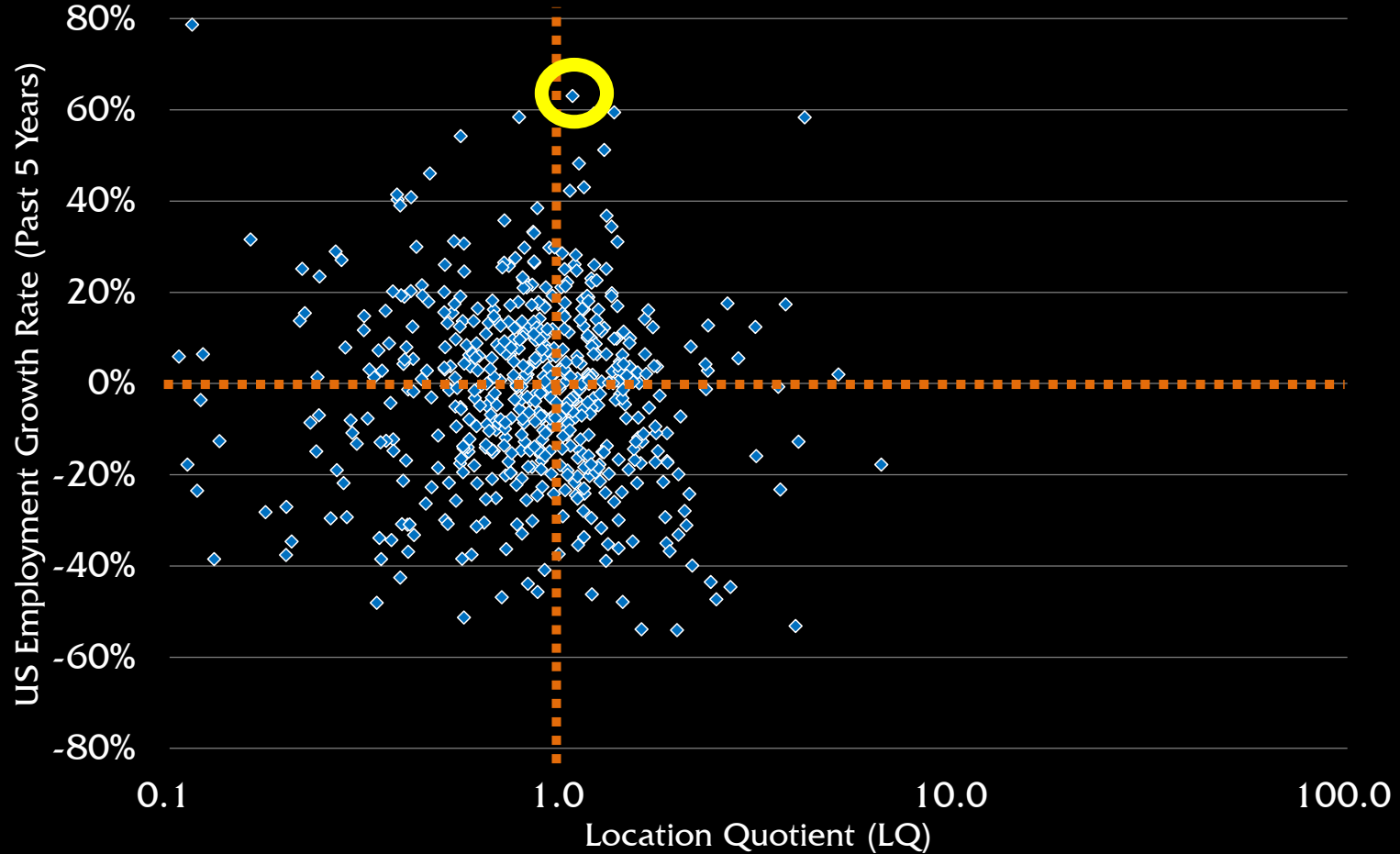
What Does Nevada's New Future Look Like?



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LQ vs. National Employment Growth Rates

Phoenix MSA by Occupation



APPLIED ANALYSIS

If Economic Development Is Nevada's New Economy,

What Does Nevada's New Future Look Like?



Date of Presentation:

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WELCOME TO
**Salt Lake City
Utah**



APPLIED
ANALYSIS



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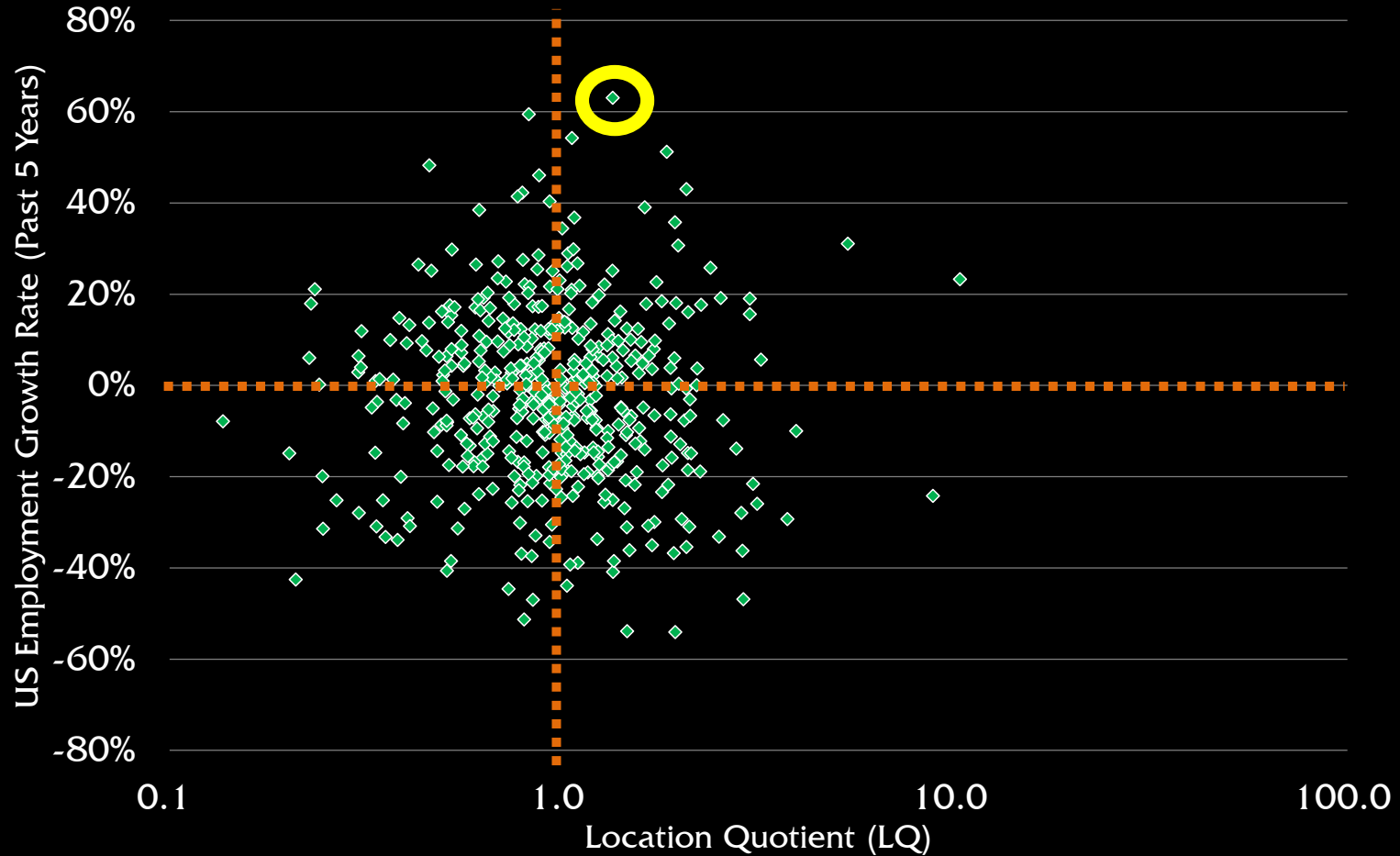
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LQ vs. National Employment Growth Rates

Salt Lake City MSA by Occupation



APPLIED ANALYSIS

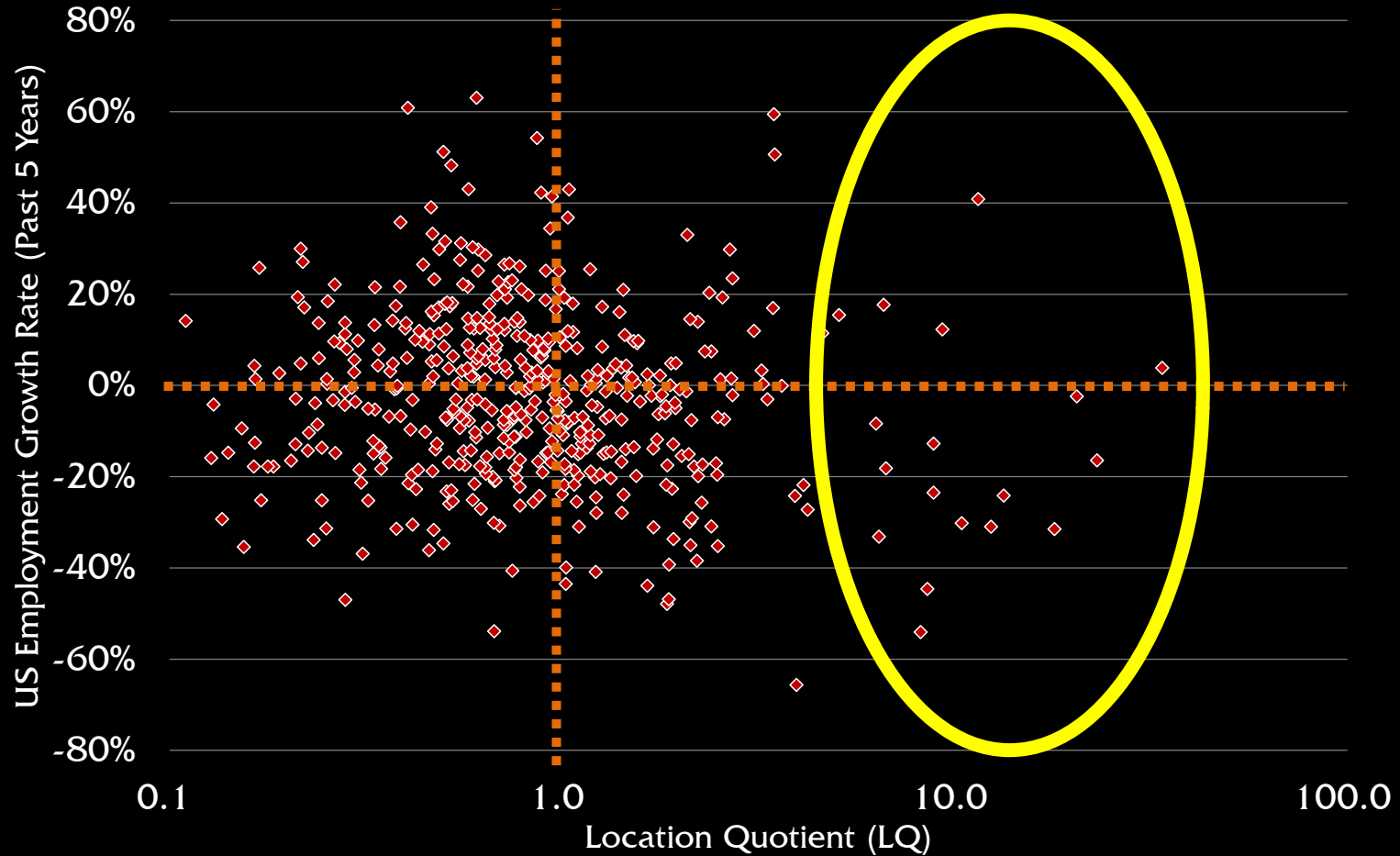
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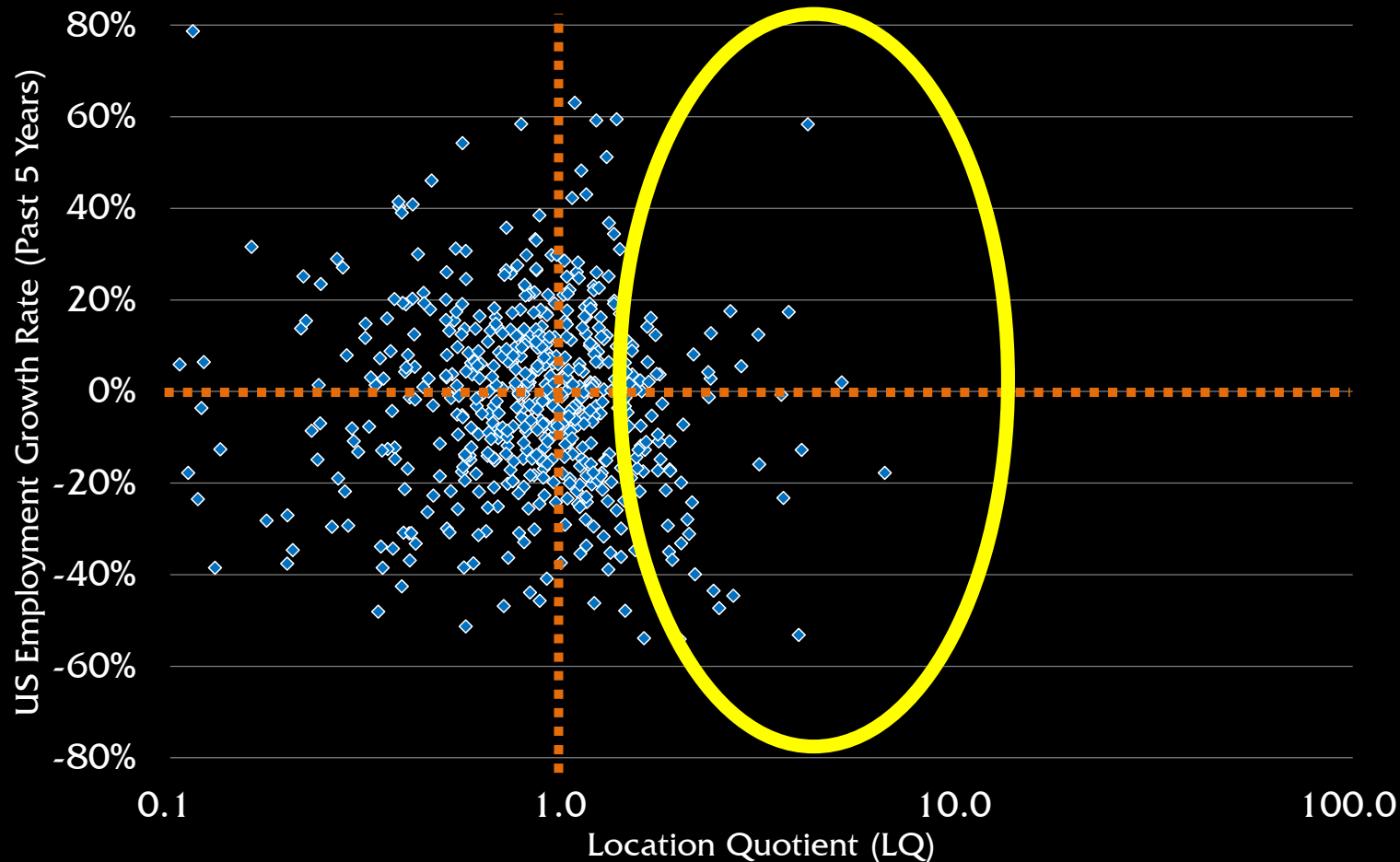


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Phoenix MSA by Occupation



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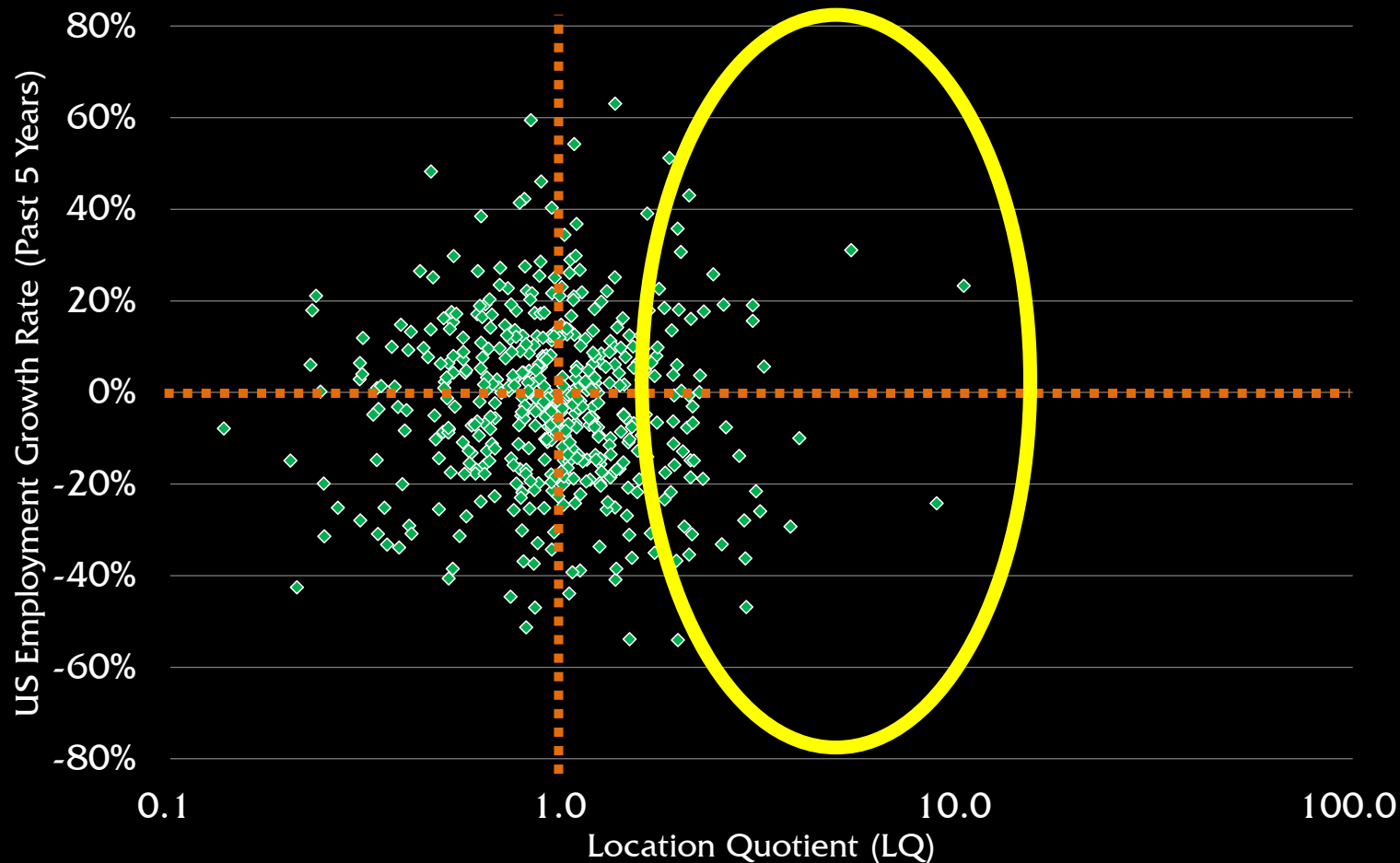


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LQ vs. National Employment Growth Rates

Salt Lake City MSA by Occupation



APPLIED ANALYSIS

If Economic Development Is Nevada's New Economy,

What Does Nevada's New Future Look Like?



WELCOME TO
**Los Angeles
California**



APPLIED ANALYSIS



If Economic Development Is Nevada's New Economy,

What Does Nevada's New Future Look Like?





WELCOME TO
**New York
New York**



If Economic Development Is Nevada's New Economy,
What Does Nevada's New Future Look Like? 

Date of Presentation:
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WELCOME TO

**Denver
Colorado**



APPLIED
ANALYSIS



If Economic Development Is Nevada's New Economy,

What Does Nevada's New Future Look Like?





WELCOME TO
**Chicago
Illinois**



If Economic Development Is Nevada's New Economy,
What Does Nevada's New Future Look Like?



Date of Presentation:
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WELCOME TO

**Miami
Florida**



APPLIED ANALYSIS



If Economic Development Is Nevada's New Economy,

What Does Nevada's New Future Look Like?



Date of Presentation:
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WELCOME TO

**Dallas
Texas**



APPLIED ANALYSIS



If Economic Development Is Nevada's New Economy,

What Does Nevada's New Future Look Like?



Date of Presentation:
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WELCOME TO
**Seattle
Washington**



If Economic Development Is Nevada's New Economy,
What Does Nevada's New Future Look Like?



Date of Presentation:
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WELCOME TO
**San Francisco
California**



APPLIED ANALYSIS



If Economic Development Is Nevada's New Economy,
What Does Nevada's New Future Look Like?



RESET

RETHINK

REBUILD



APPLIED
ANALYSIS



If Economic Development Is Nevada's New Economy,

What Does Nevada's New Future Look Like?



If Economic Development Is Nevada's New Economy,
What Does Nevada's New Future Look Like?

