

THE “NEW NEVADA”

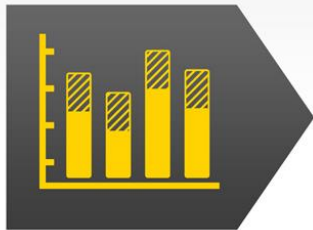
IMAGINING WHAT COMES NEXT



APPLIED
ANALYSIS 

September 20, 2013

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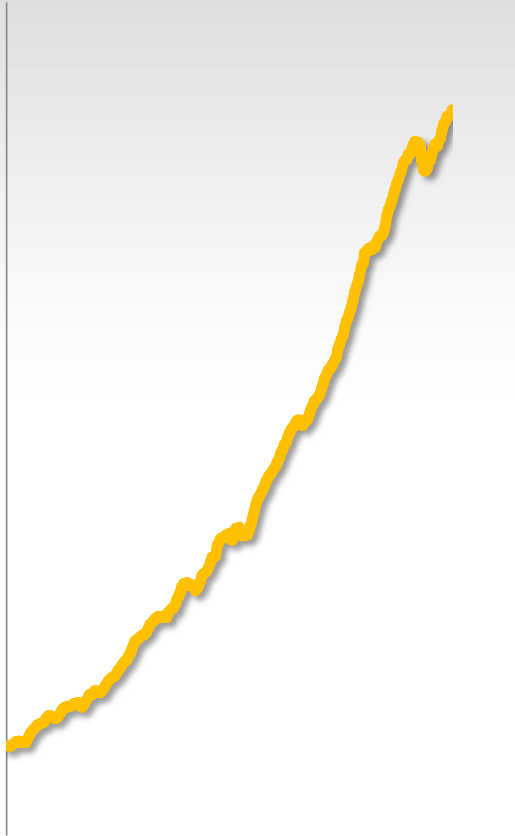
GENERAL OVERVIEW OF NEVADA'S ECONOMY



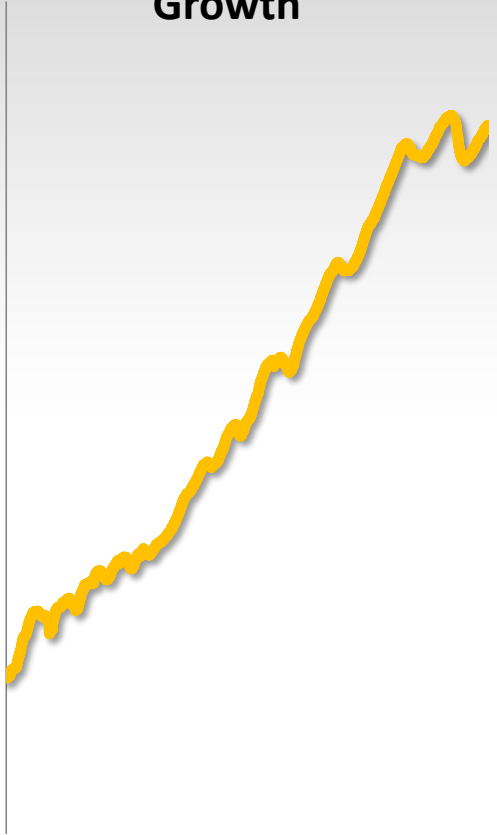
THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

APPLIED
ANALYSIS 

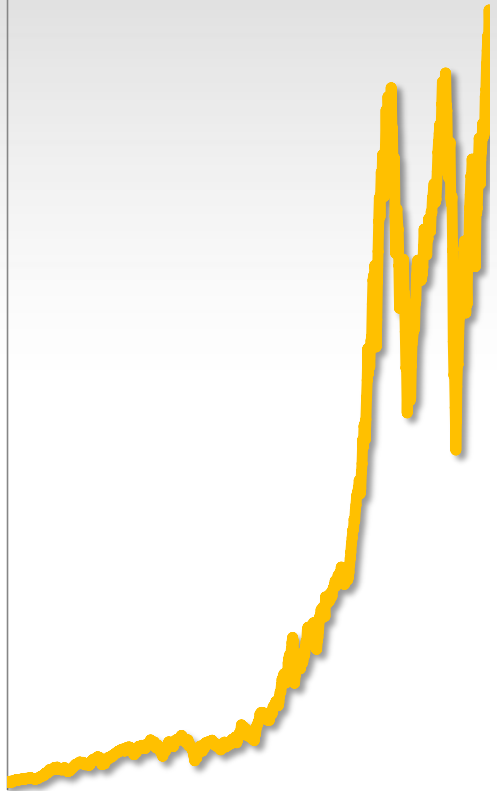
Real GDP



Employment Growth



S&P 500



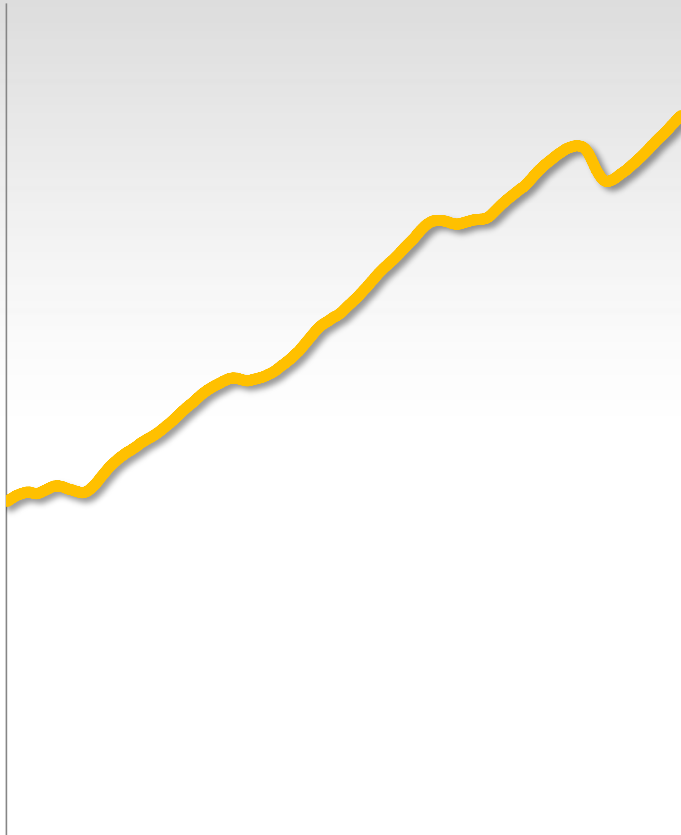
THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy

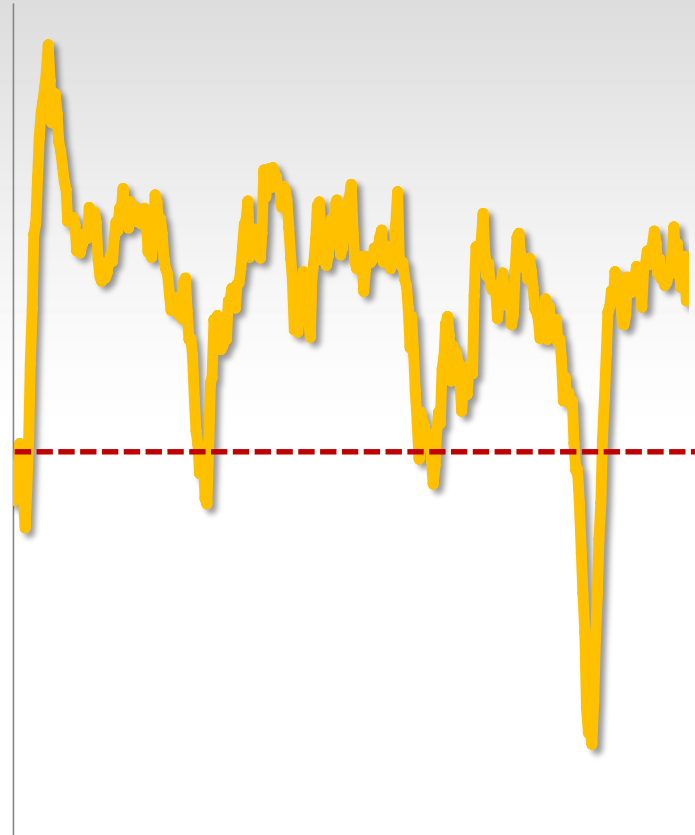
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Coincident Index



Leading Index

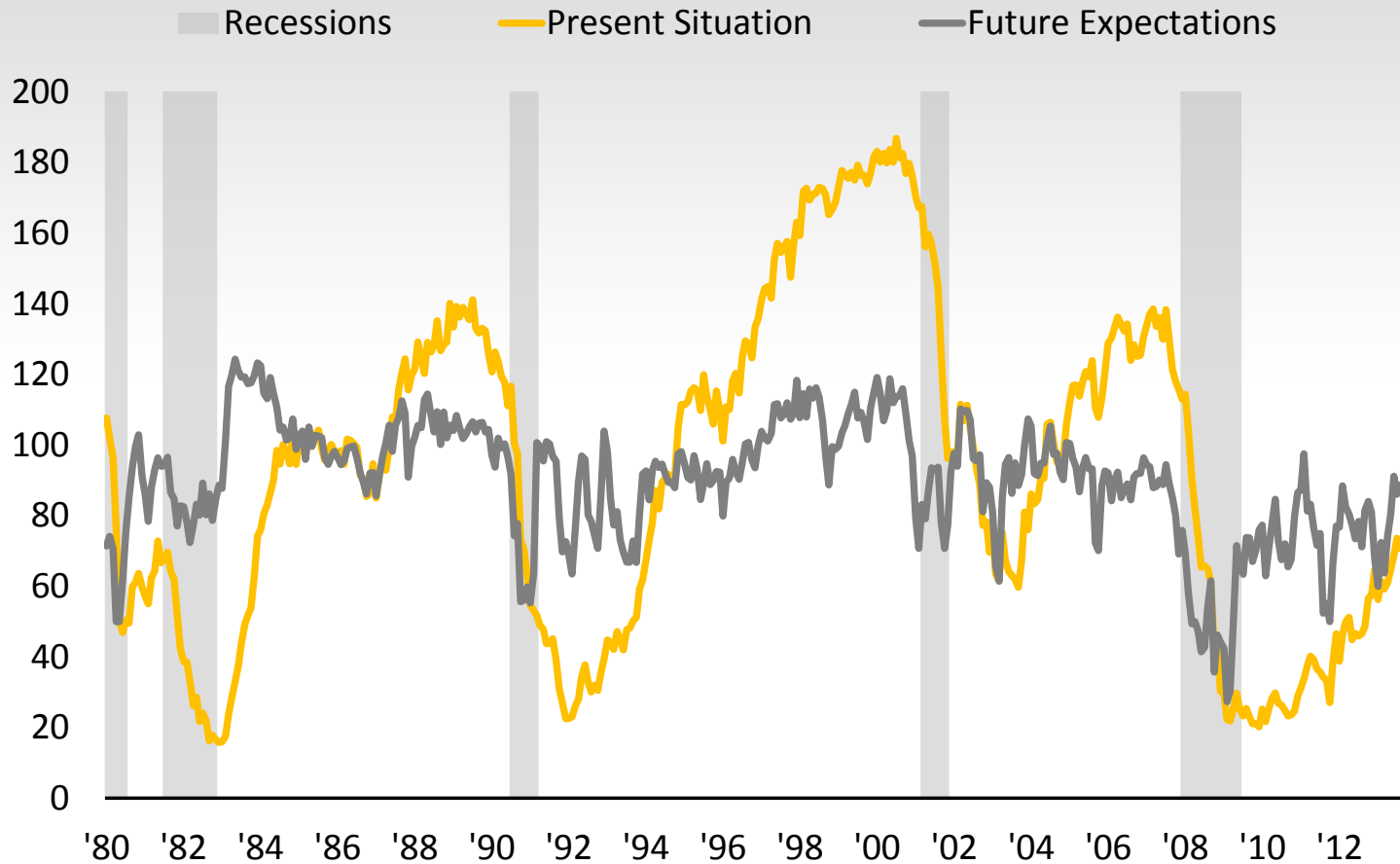


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General Overview of Nevada's Economy

APPLIED ANALYSIS 

Consumer Confidence Index



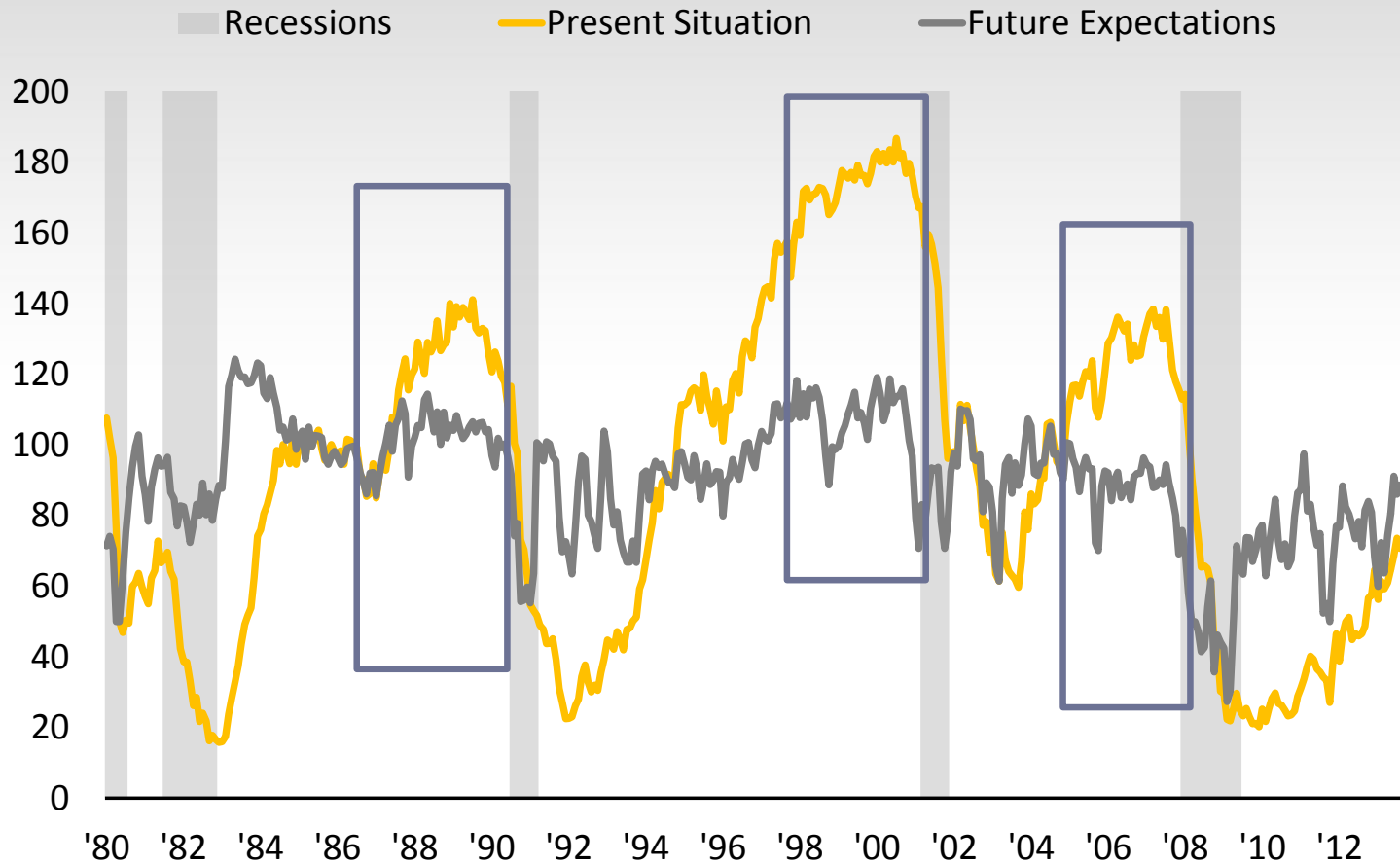
THE "NEW NEVADA"
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General Overview of Nevada's Economy

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Consumer Confidence Index



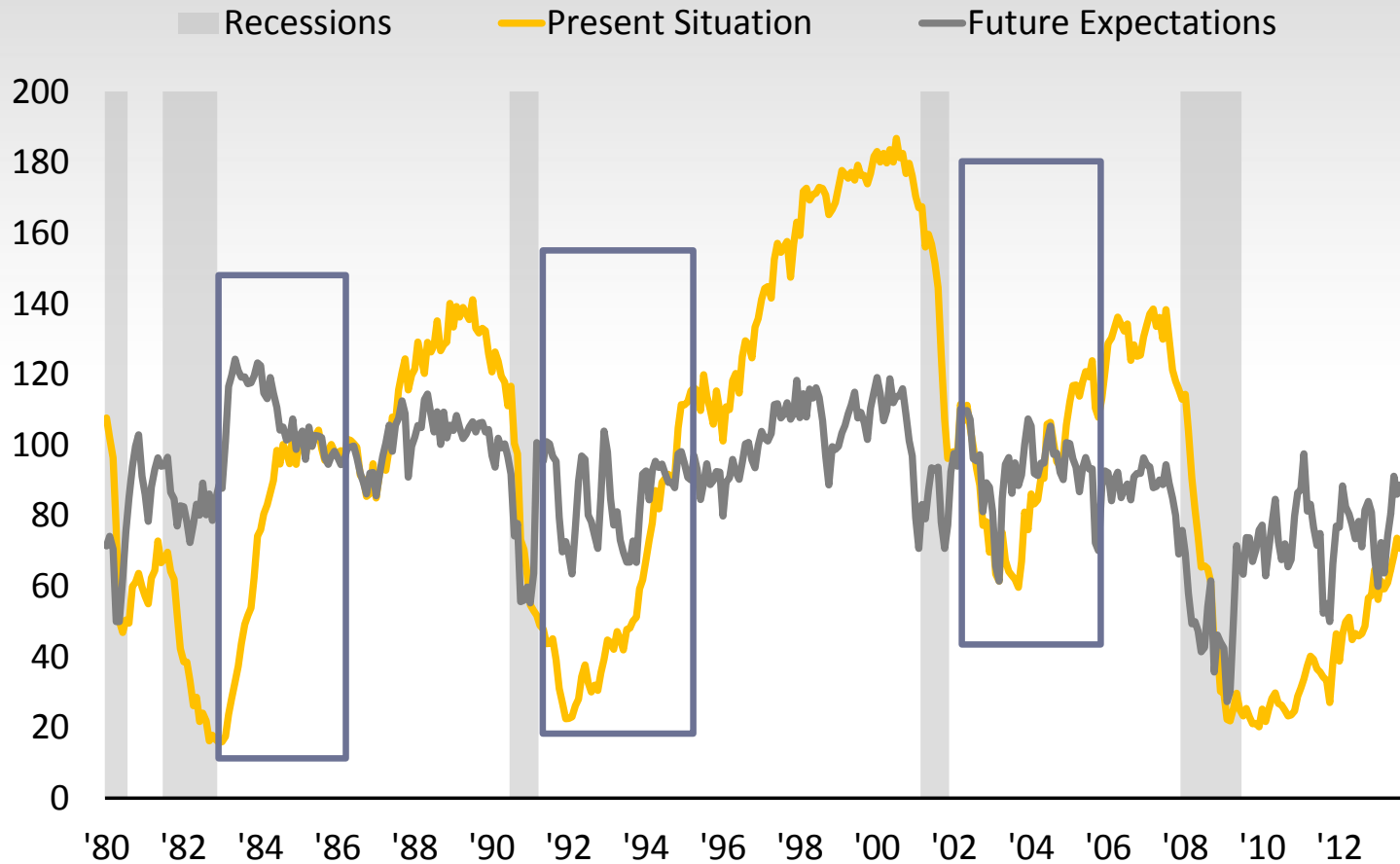
THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy

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Consumer Confidence Index



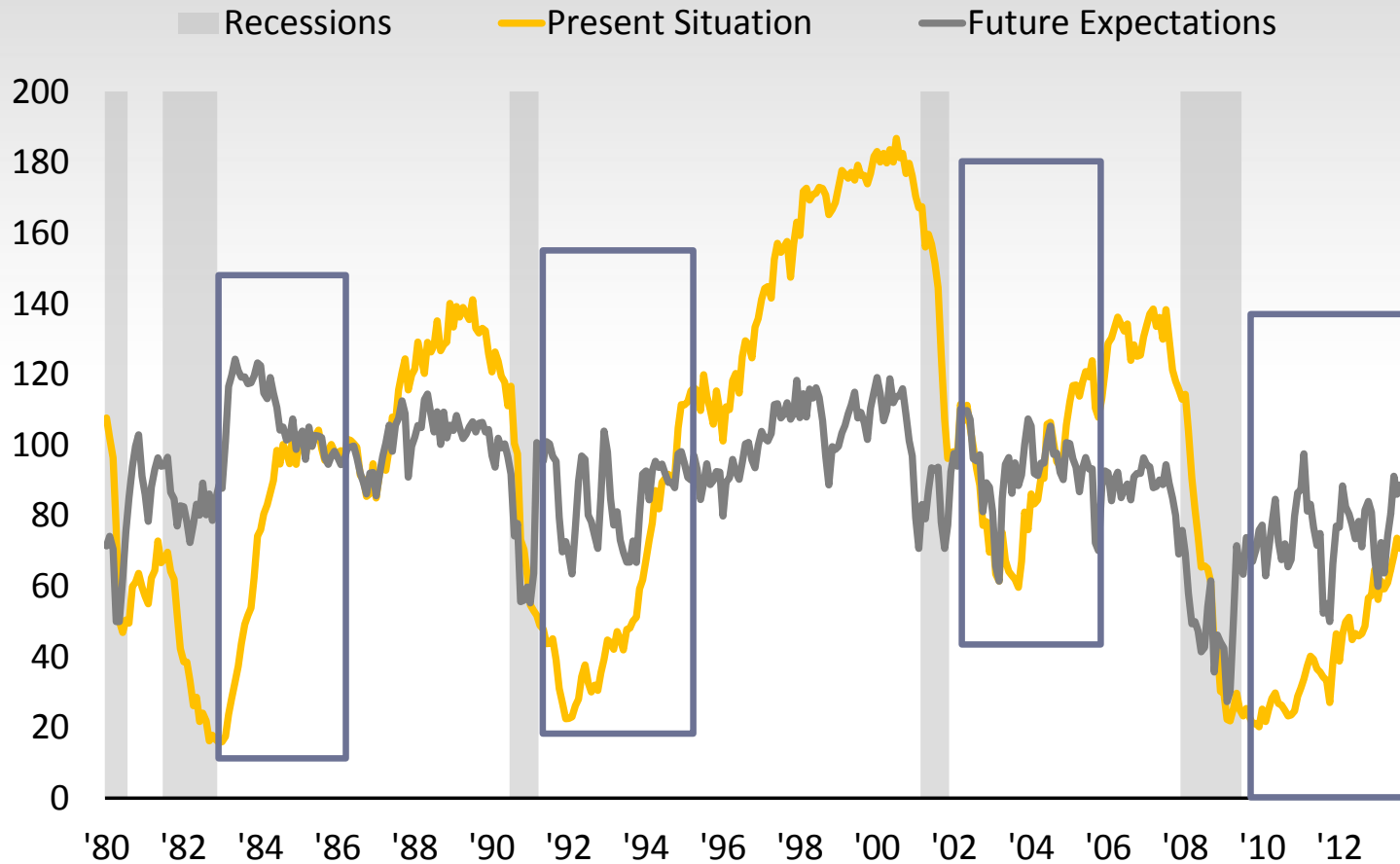
THE "NEW NEVADA"
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General Overview of Nevada's Economy

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Consumer Confidence Index



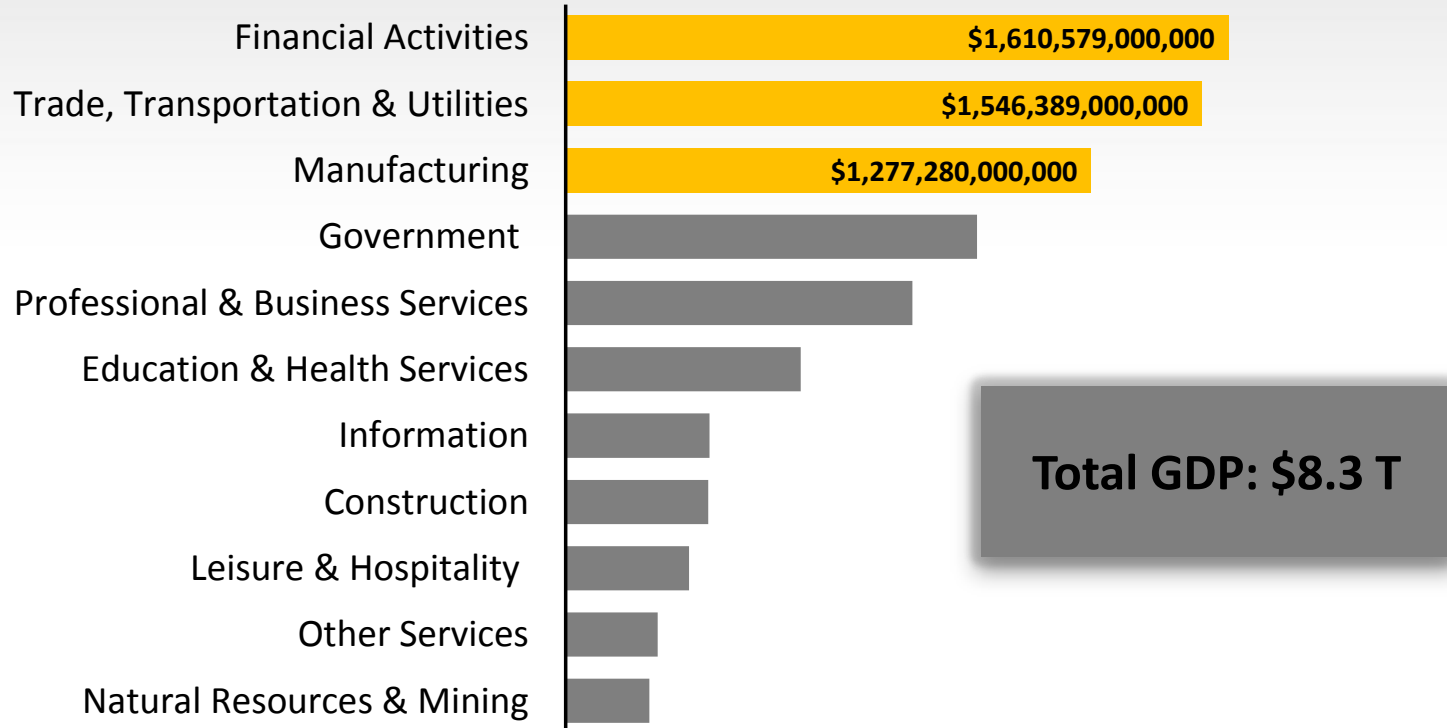
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General Overview of Nevada's Economy

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U.S. Gross Domestic Product: 1997



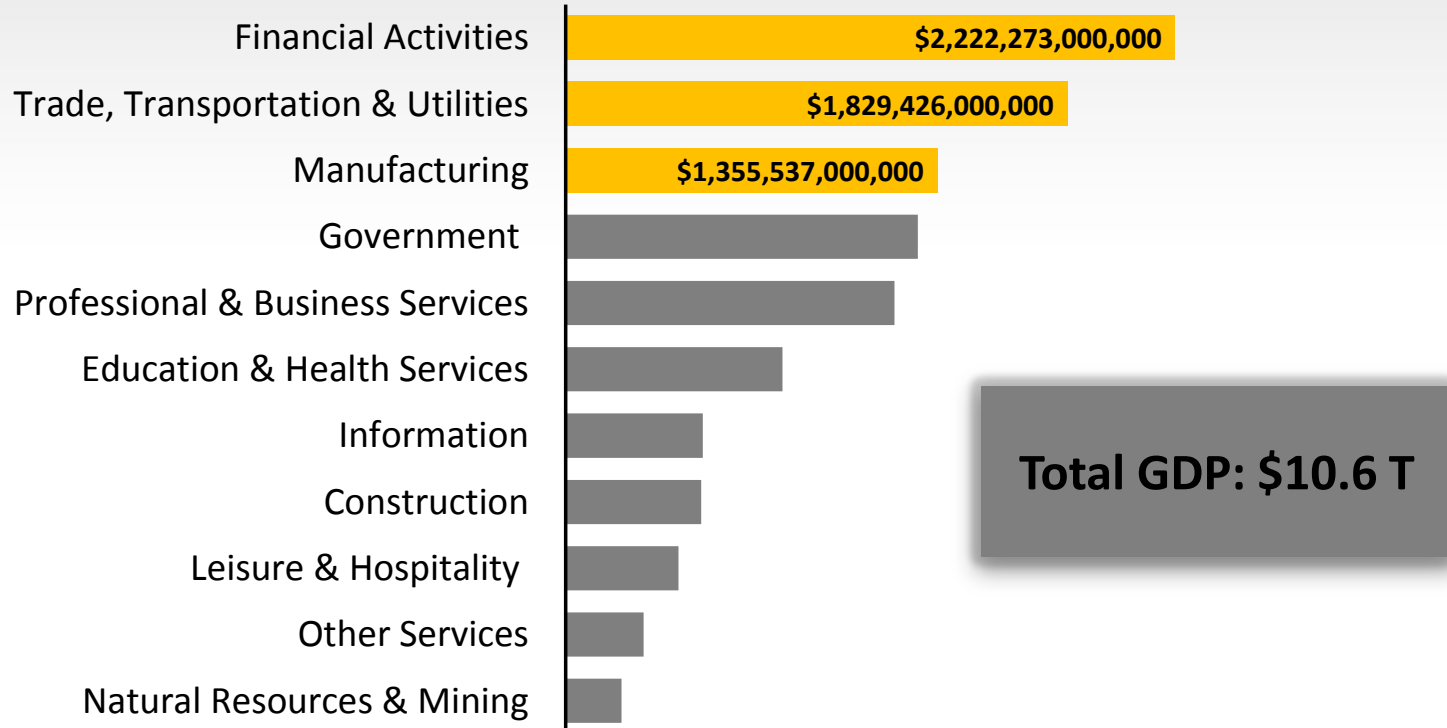
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U.S. Gross Domestic Product: 2002



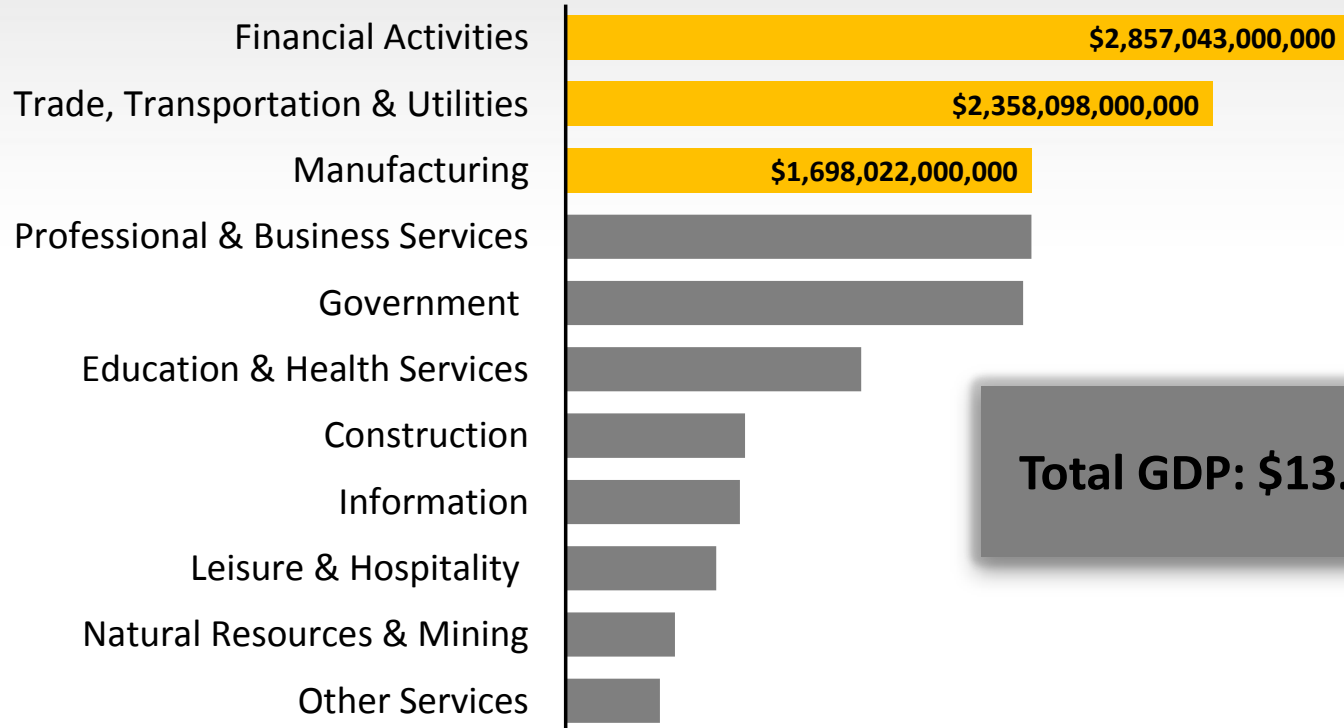
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IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy

APPLIED ANALYSIS



U.S. Gross Domestic Product: 2007



Total GDP: \$13.9 T



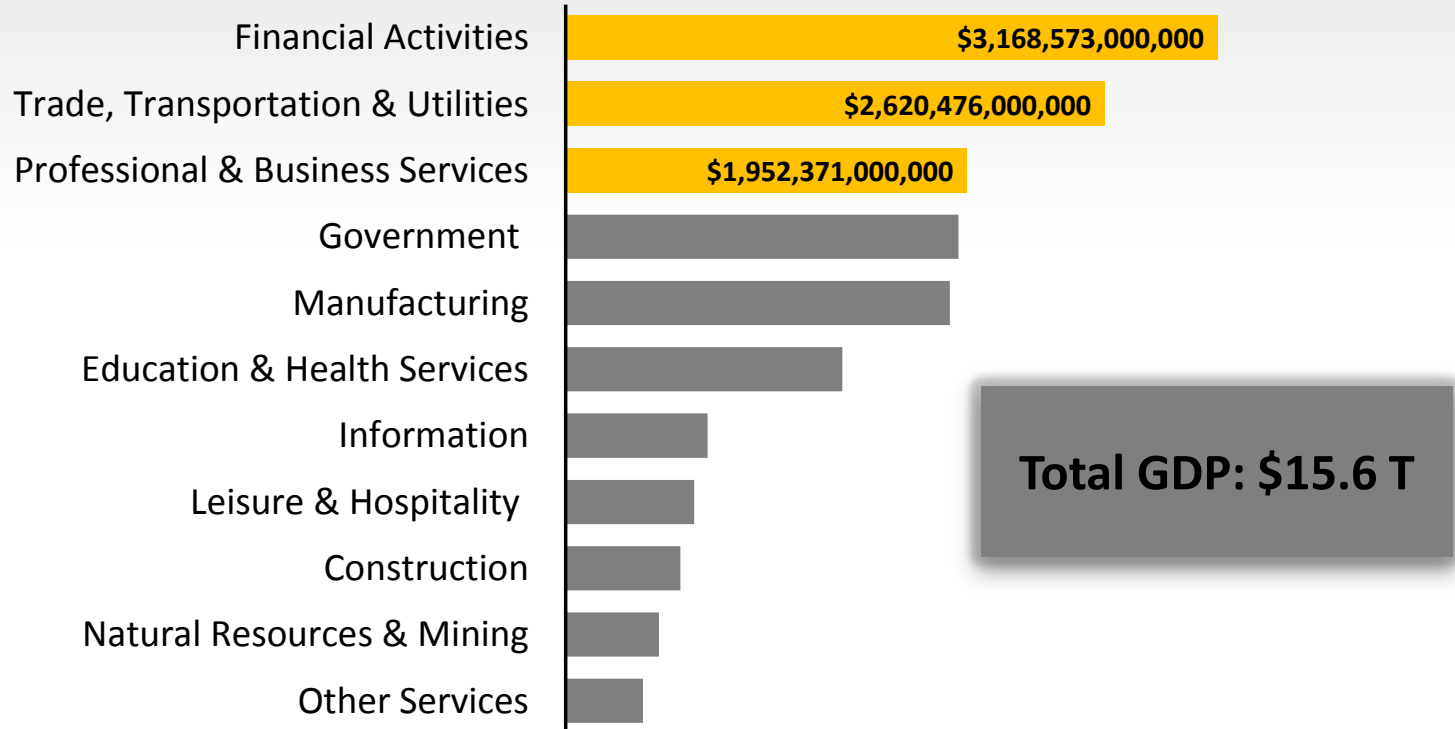
THE "NEW NEVADA"
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General Overview of Nevada's Economy

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U.S. Gross Domestic Product: 2012



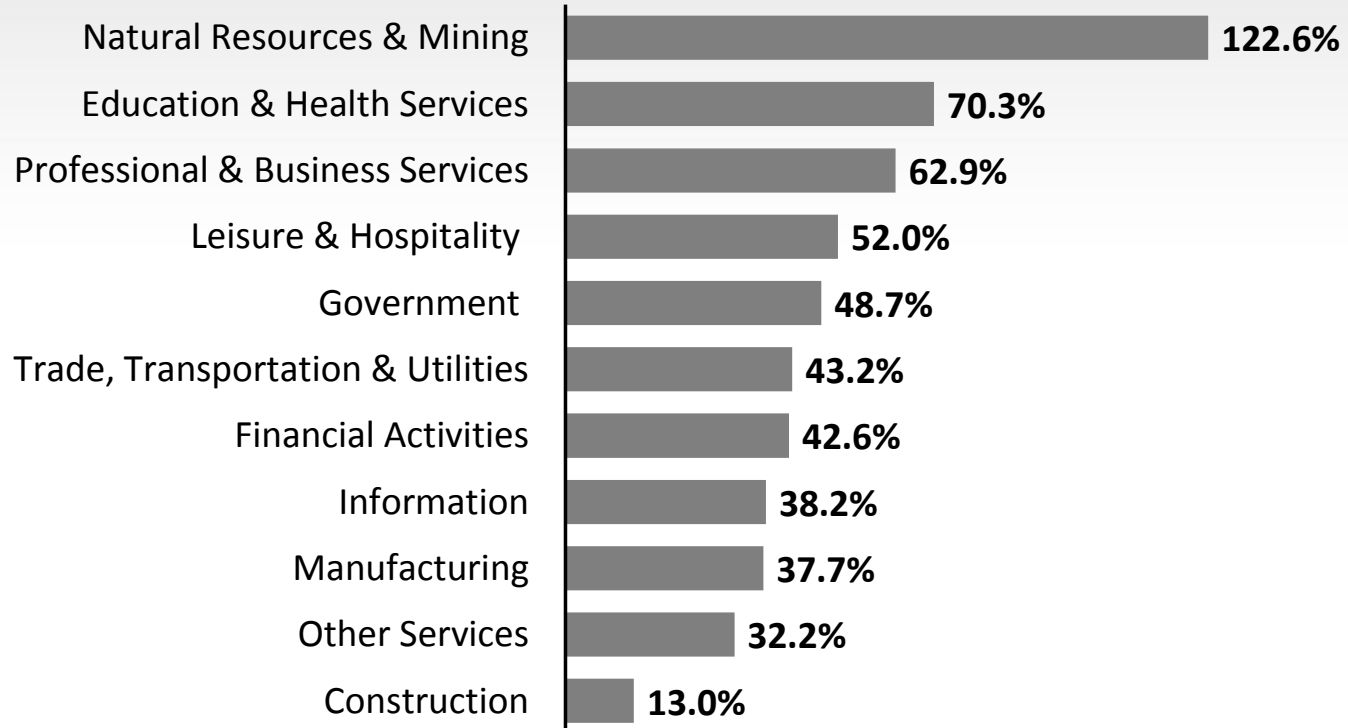
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IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy

APPLIED ANALYSIS



U.S. Gross Domestic Product 10-Year Growth

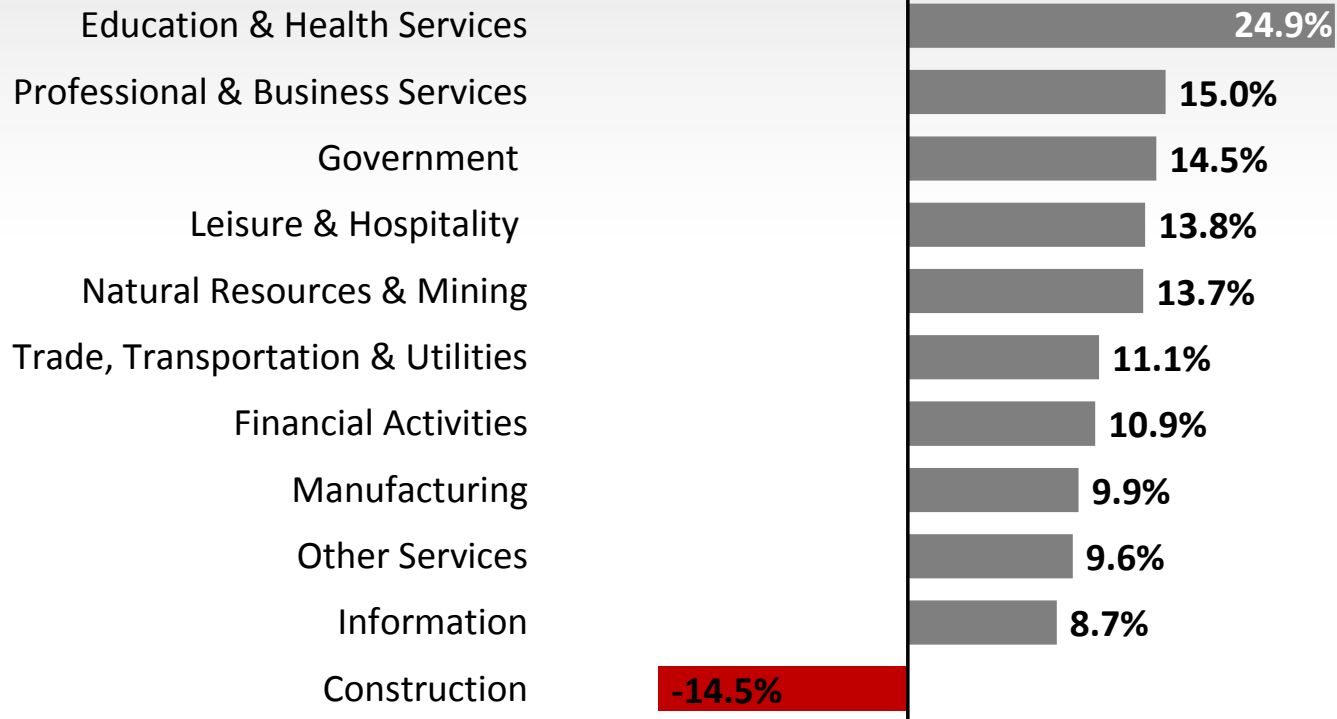


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General Overview of Nevada's Economy

APPLIED ANALYSIS

U.S. Gross Domestic Product 5-Year Growth

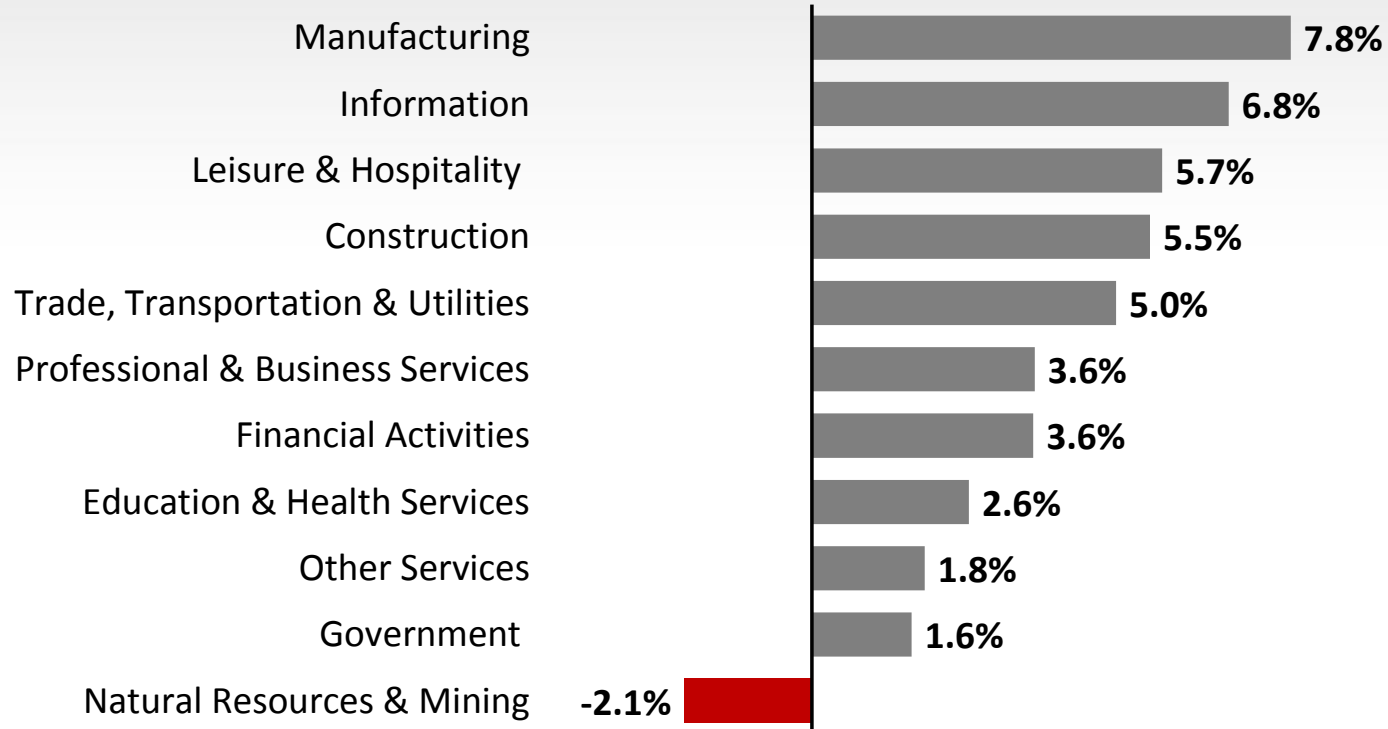


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IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy

APPLIED ANALYSIS

U.S. Gross Domestic Product 1-Year Growth

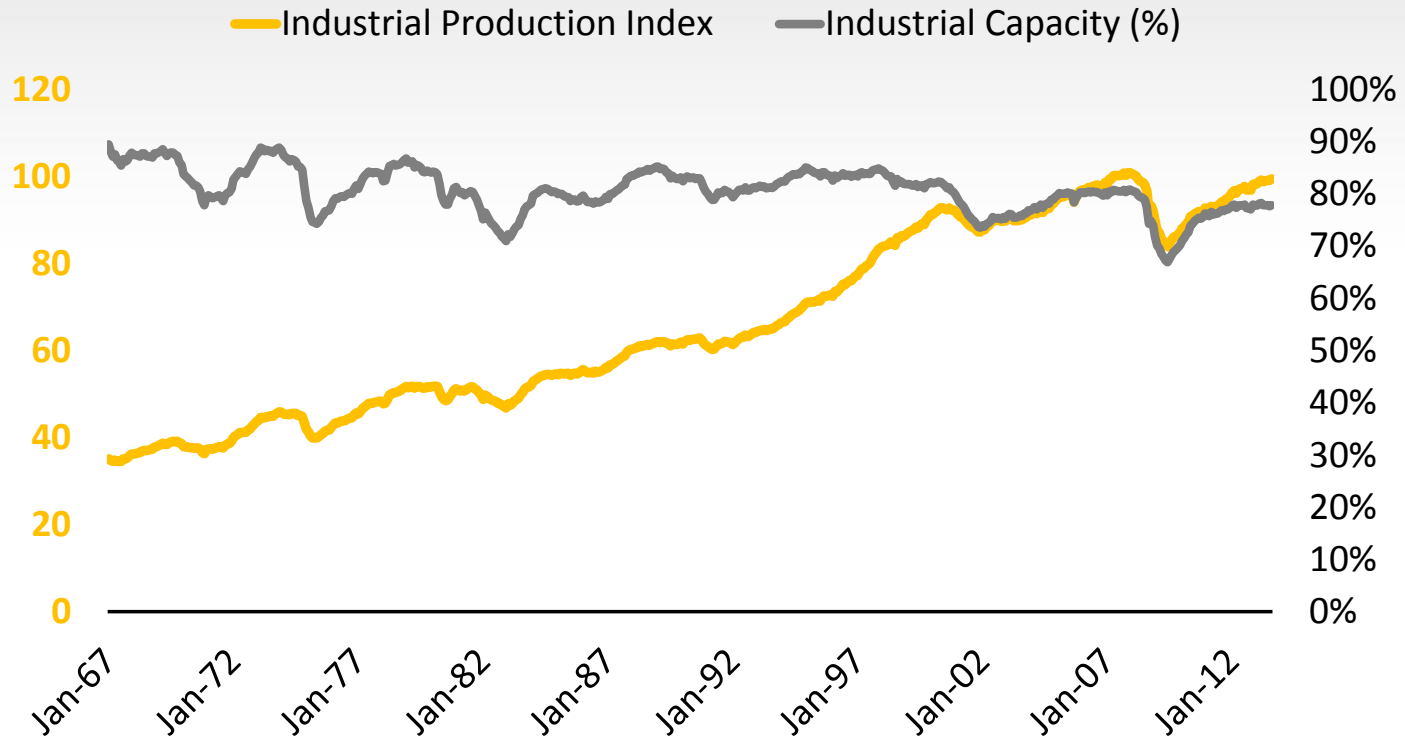


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IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy

APPLIED ANALYSIS

Industrial Capacity and Productivity



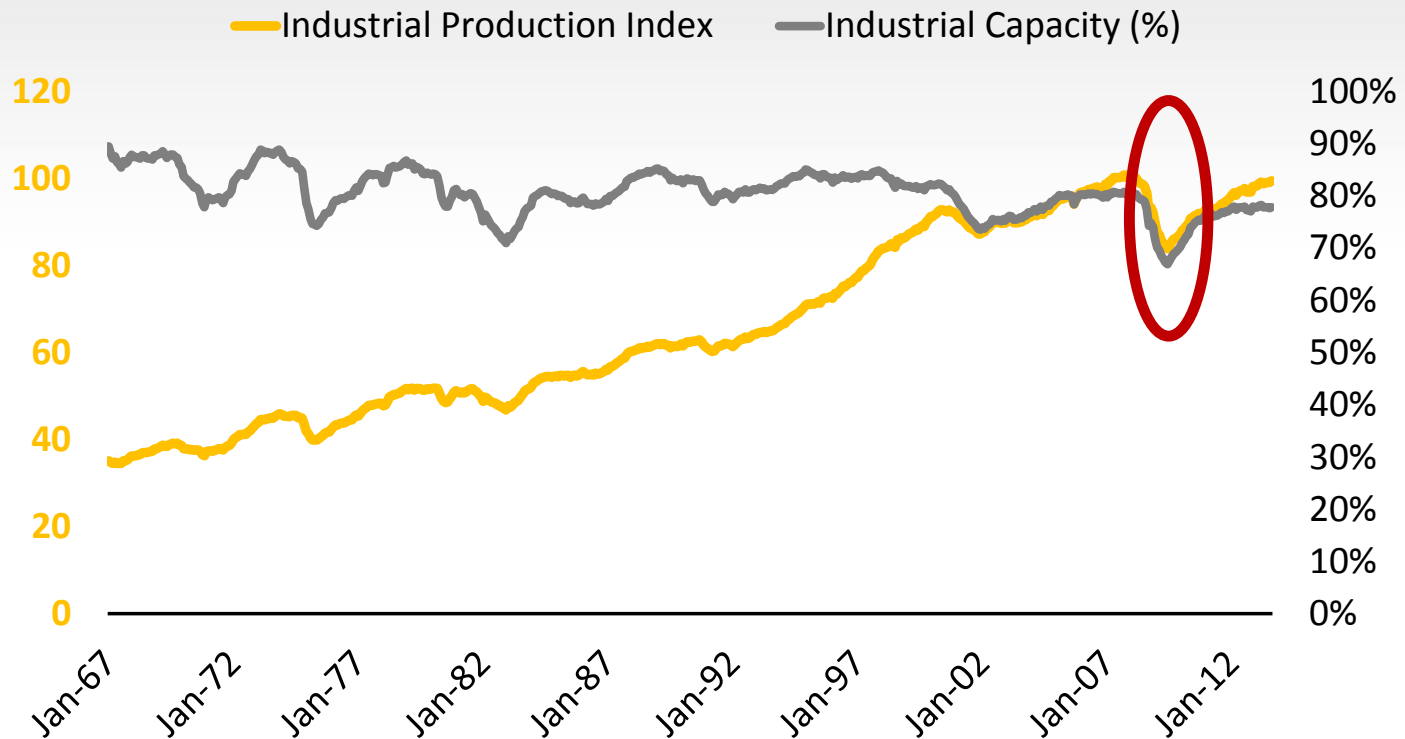
THE "NEW NEVADA"
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General Overview of Nevada's Economy

APPLIED ANALYSIS



Industrial Capacity and Productivity



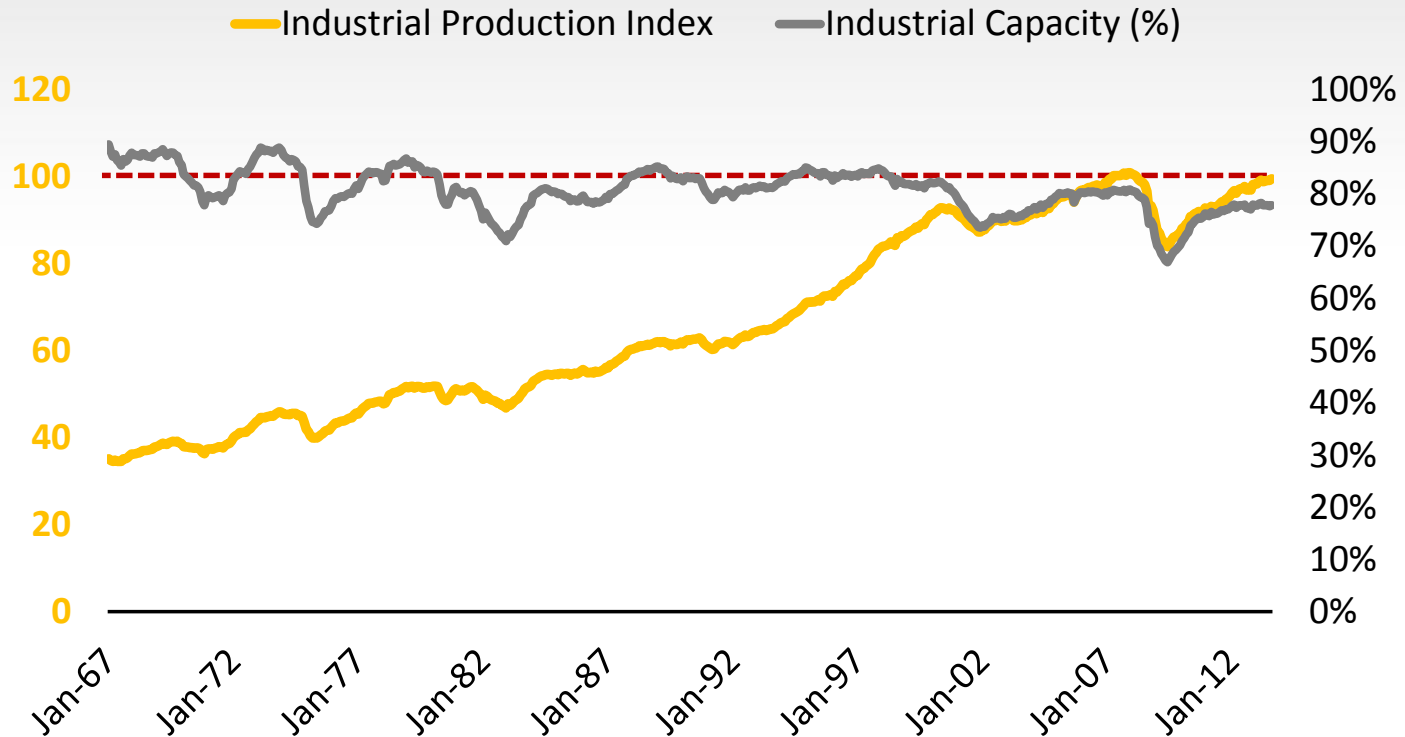
THE "NEW NEVADA"
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General Overview of Nevada's Economy

APPLIED ANALYSIS



Industrial Capacity and Productivity

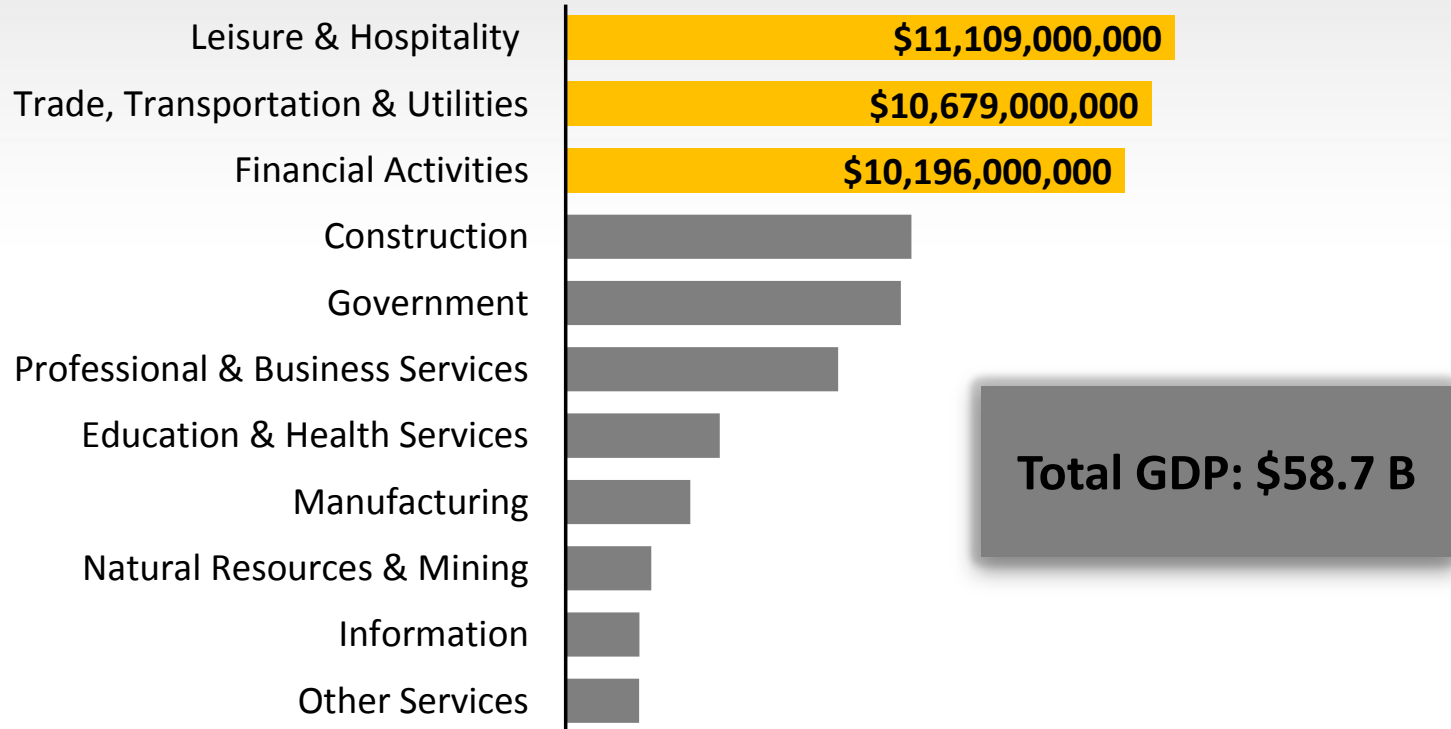


THE "NEW NEVADA"
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General Overview of Nevada's Economy



NV Gross Domestic Product: 1997



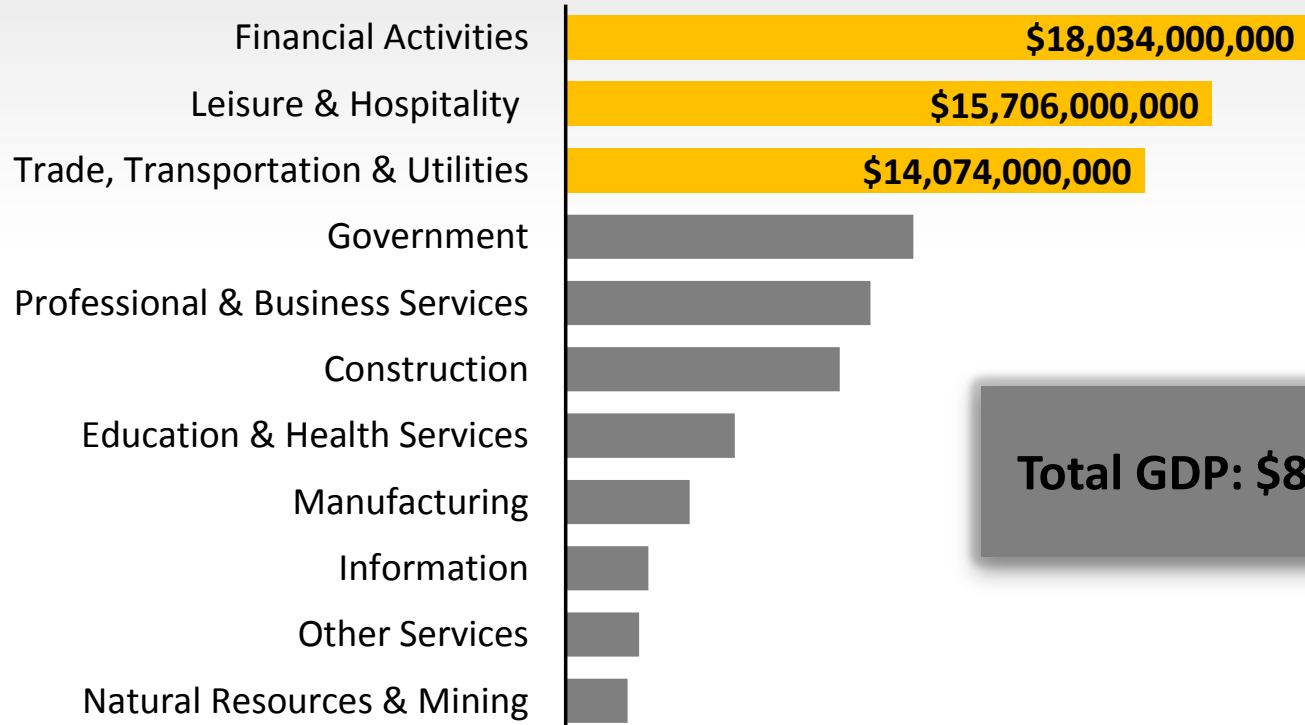
THE "NEW NEVADA"
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General Overview of Nevada's Economy

APPLIED ANALYSIS



NV Gross Domestic Product: 2002



Total GDP: \$82.8 B



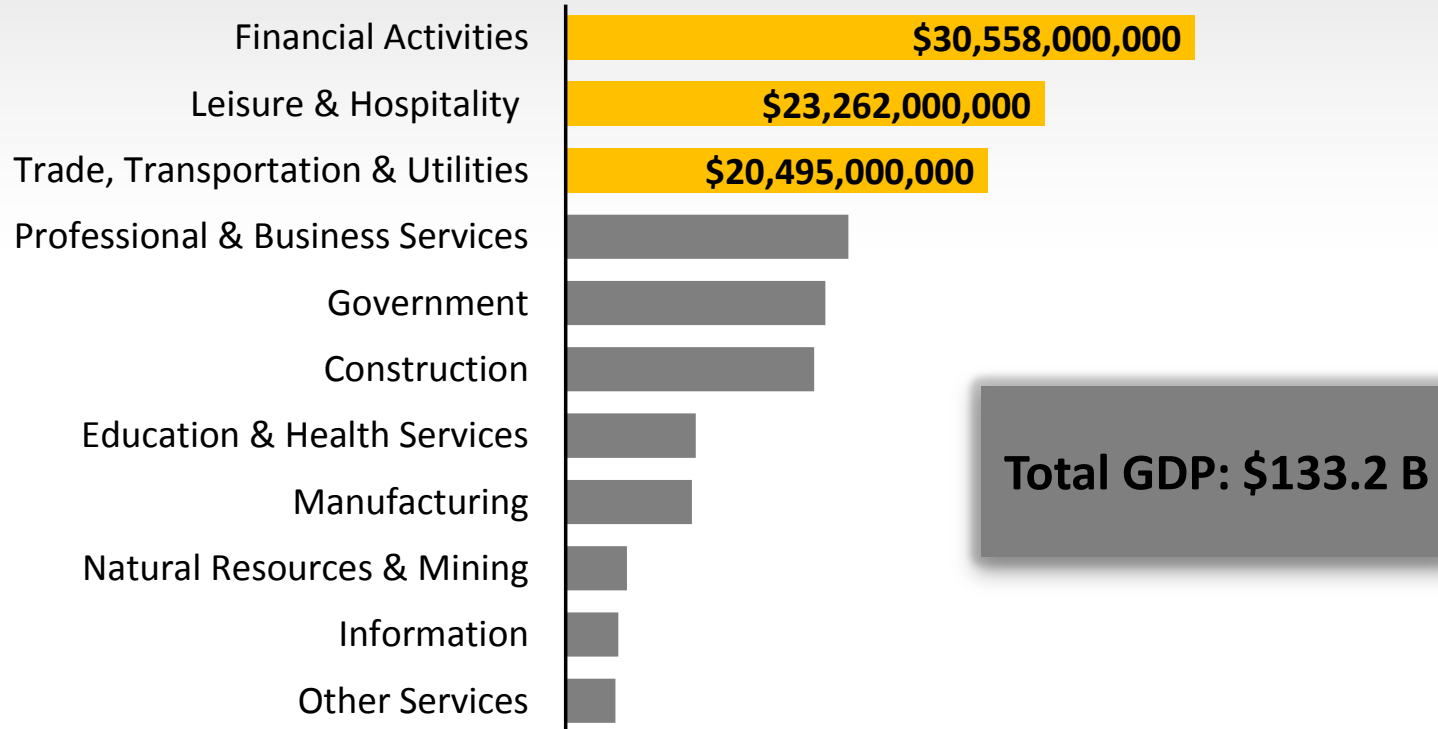
THE "NEW NEVADA"
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General Overview of Nevada's Economy

APPLIED ANALYSIS



NV Gross Domestic Product: 2007

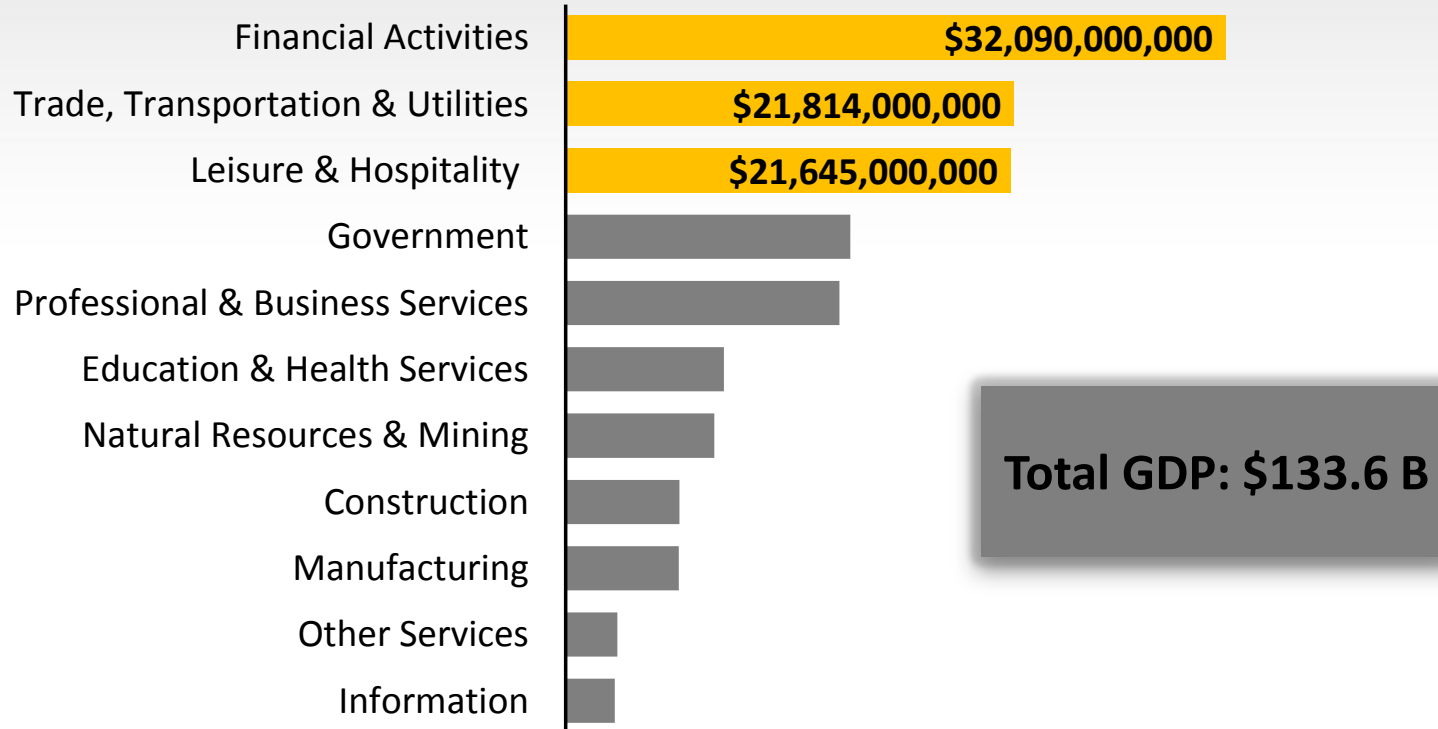


THE "NEW NEVADA"
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General Overview of Nevada's Economy

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NV Gross Domestic Product: 2012



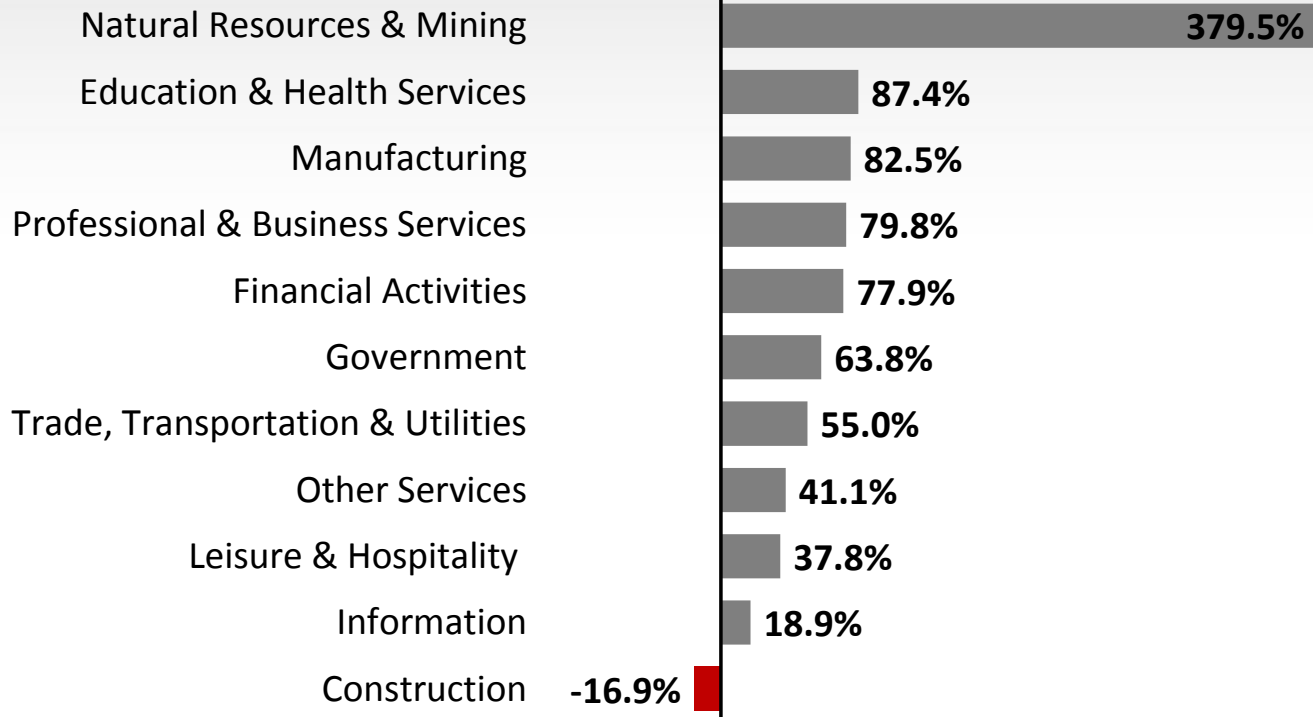
THE "NEW NEVADA"
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APPLIED
ANALYSIS

NV Gross Domestic Product 10-Year Growth

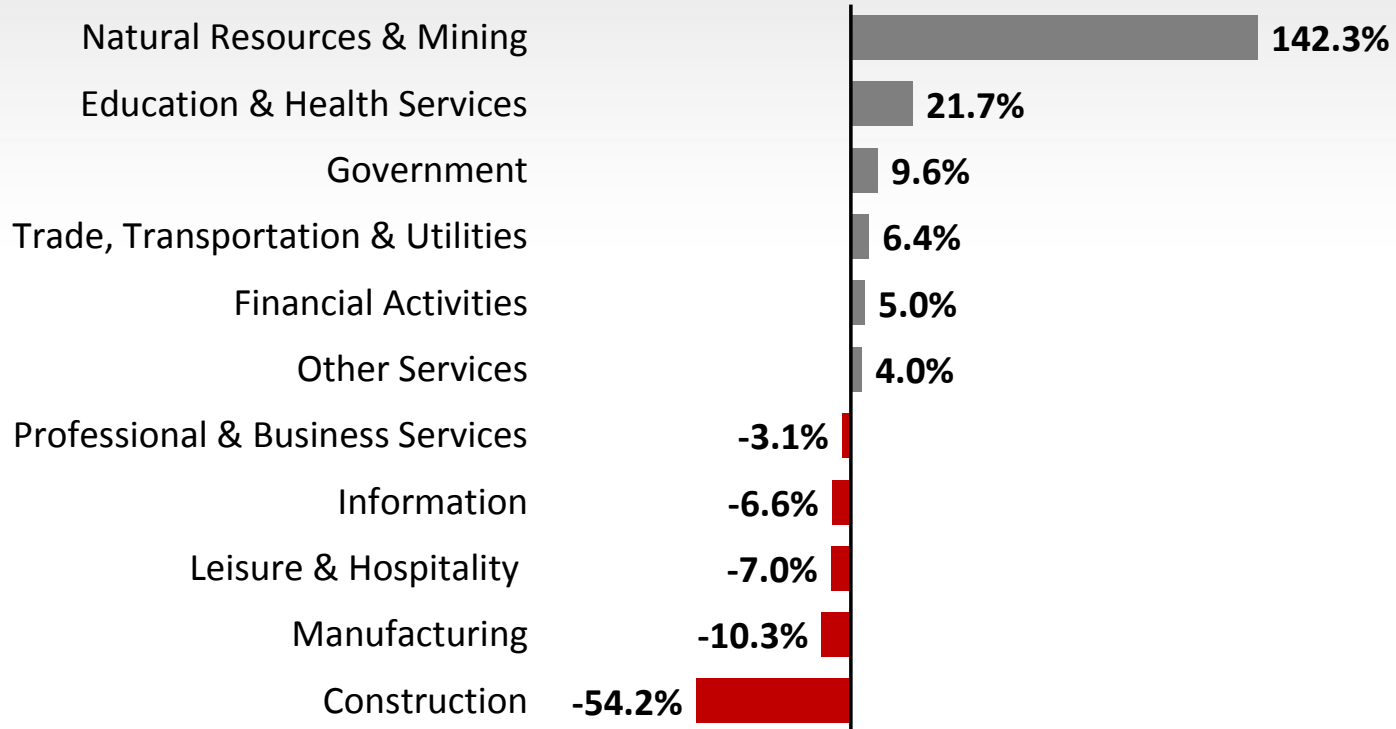


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NV Gross Domestic Product 5-Year Growth

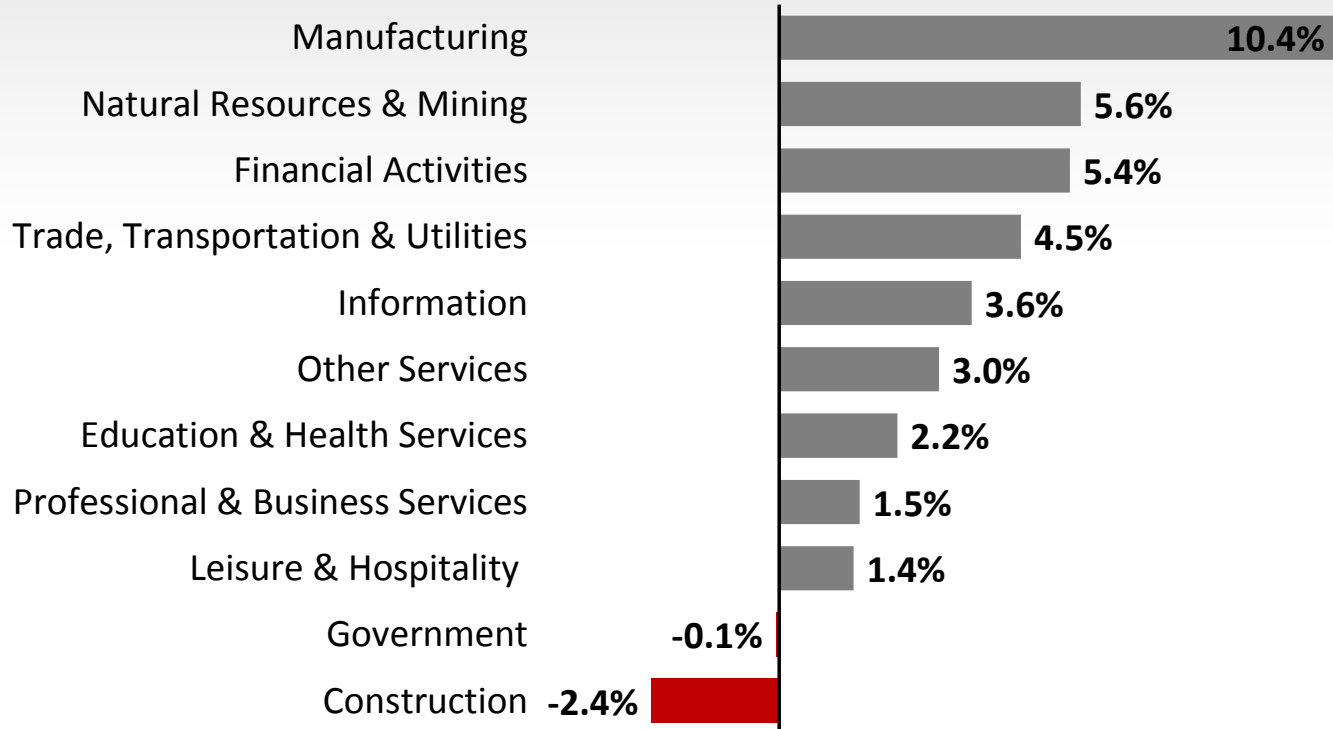


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NV Gross Domestic Product 1-Year Growth

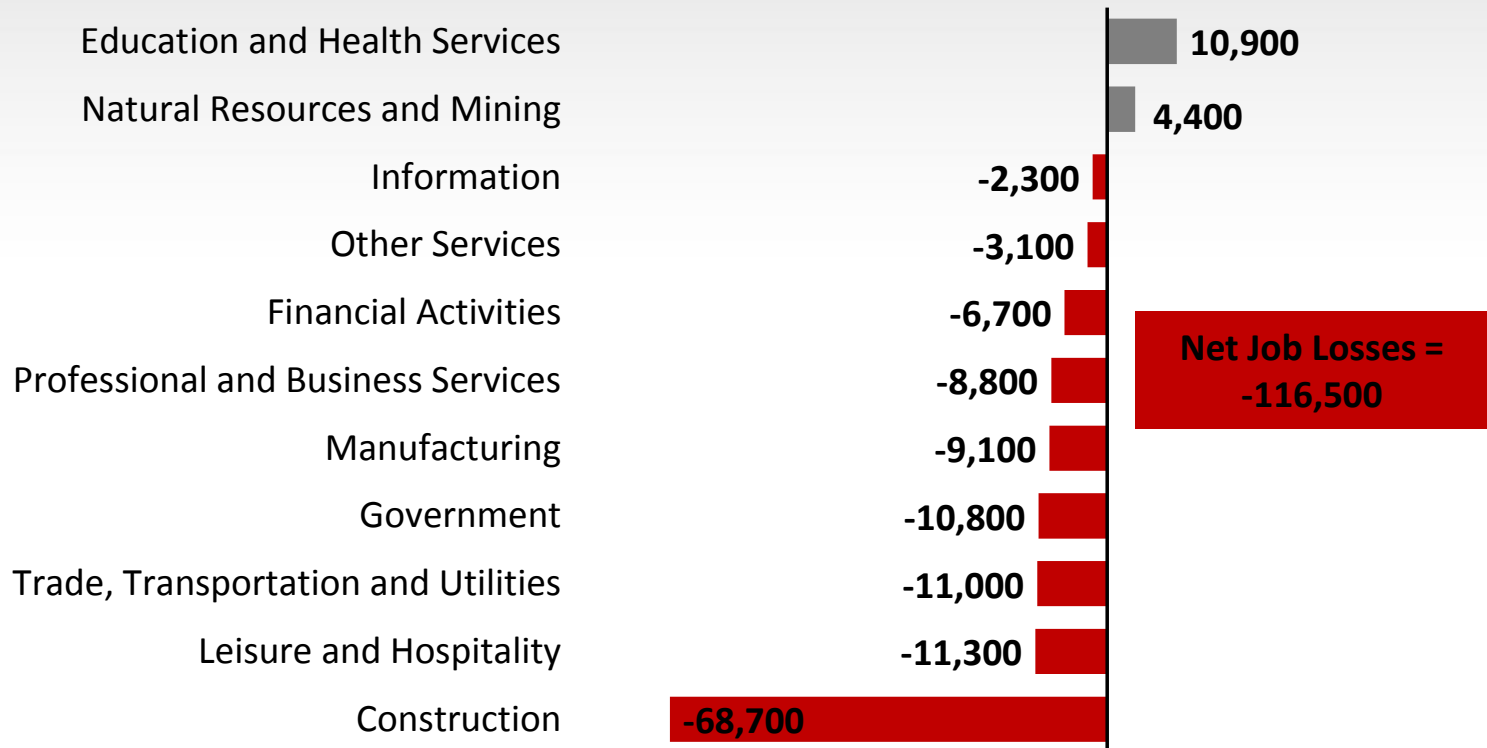


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APPLIED ANALYSIS

Nevada Employment Growth Past 5 Years

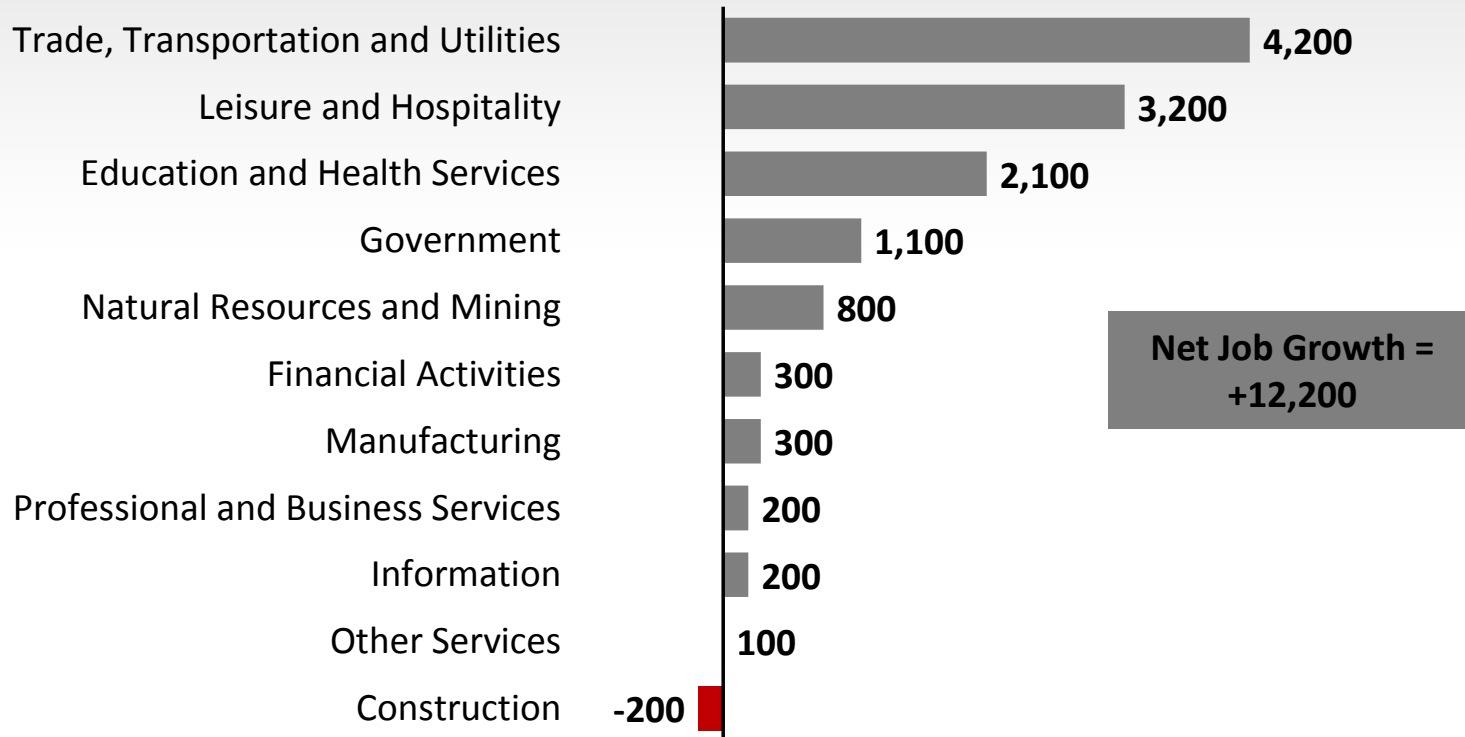


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Nevada Employment Growth Past 12 Months

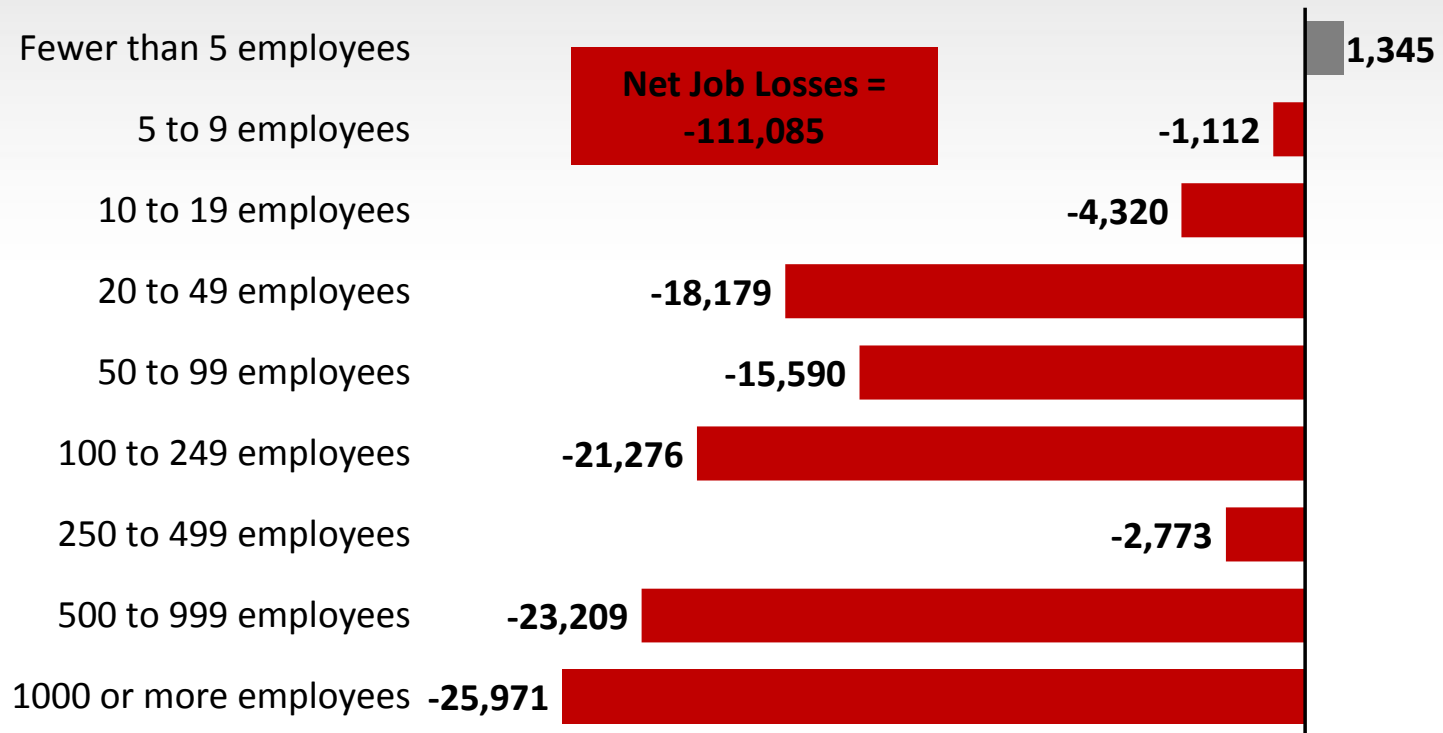


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General Overview of Nevada's Economy

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Nevada Employment Growth Past 5 Years

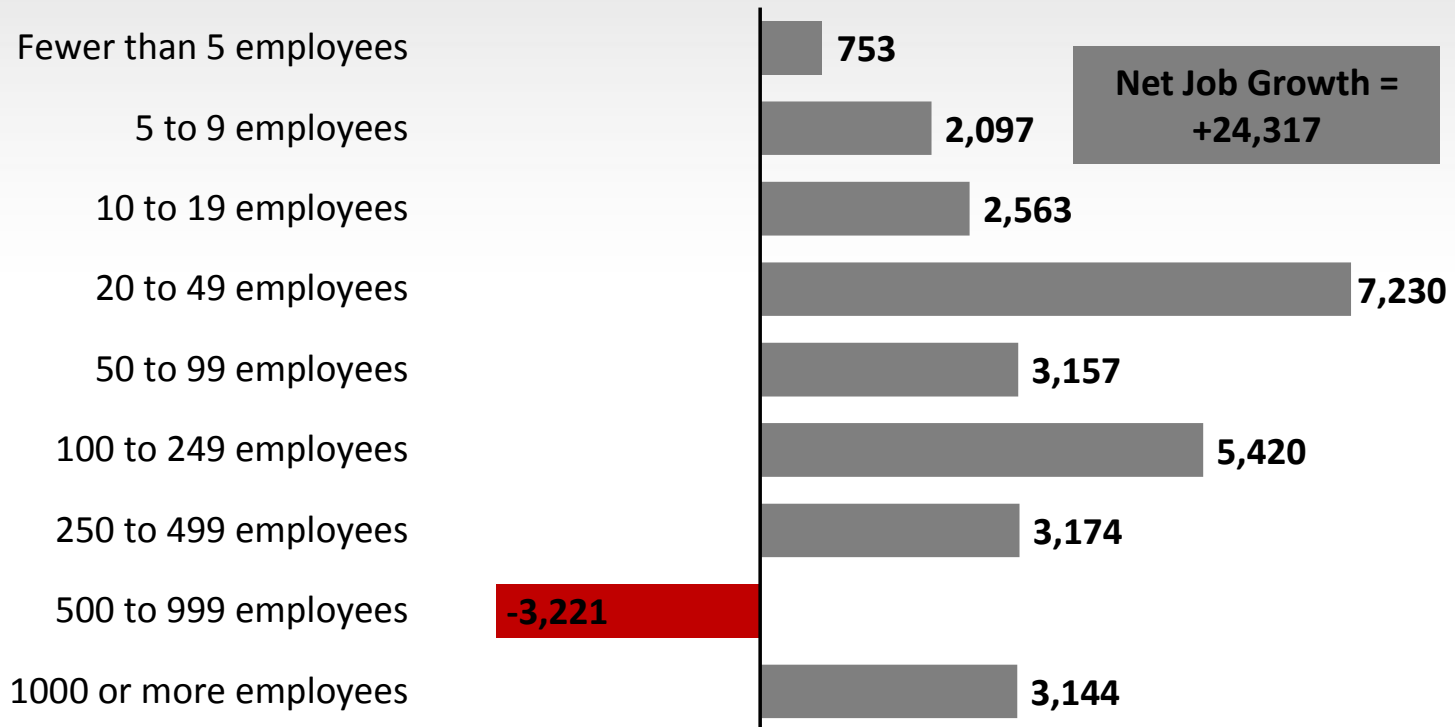


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General Overview of Nevada's Economy



Nevada Employment Growth Past 12 Months



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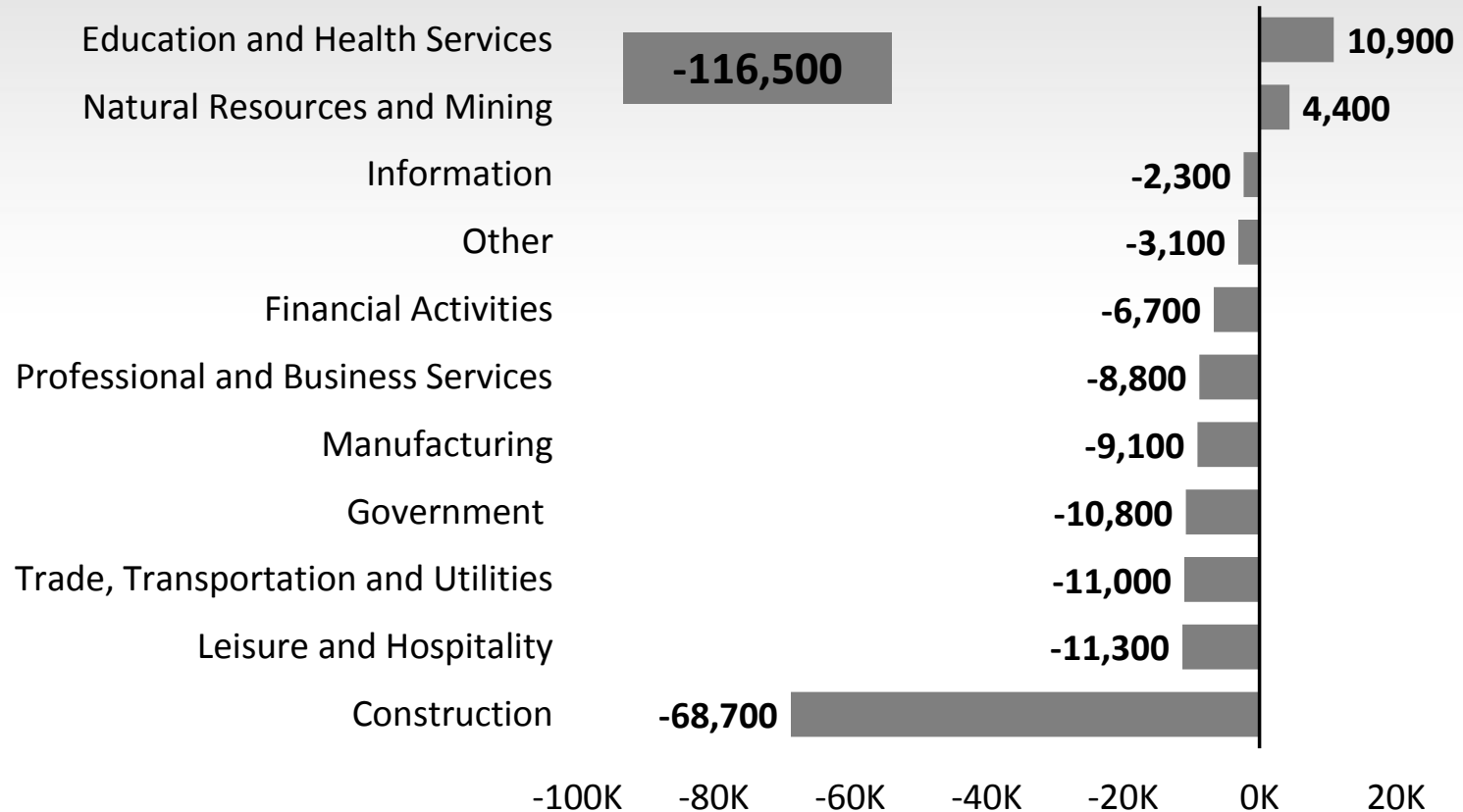
General Overview of Nevada's Economy

APPLIED ANALYSIS



Nevada Shift-Share Analysis

Net Growth | Past 5 Years



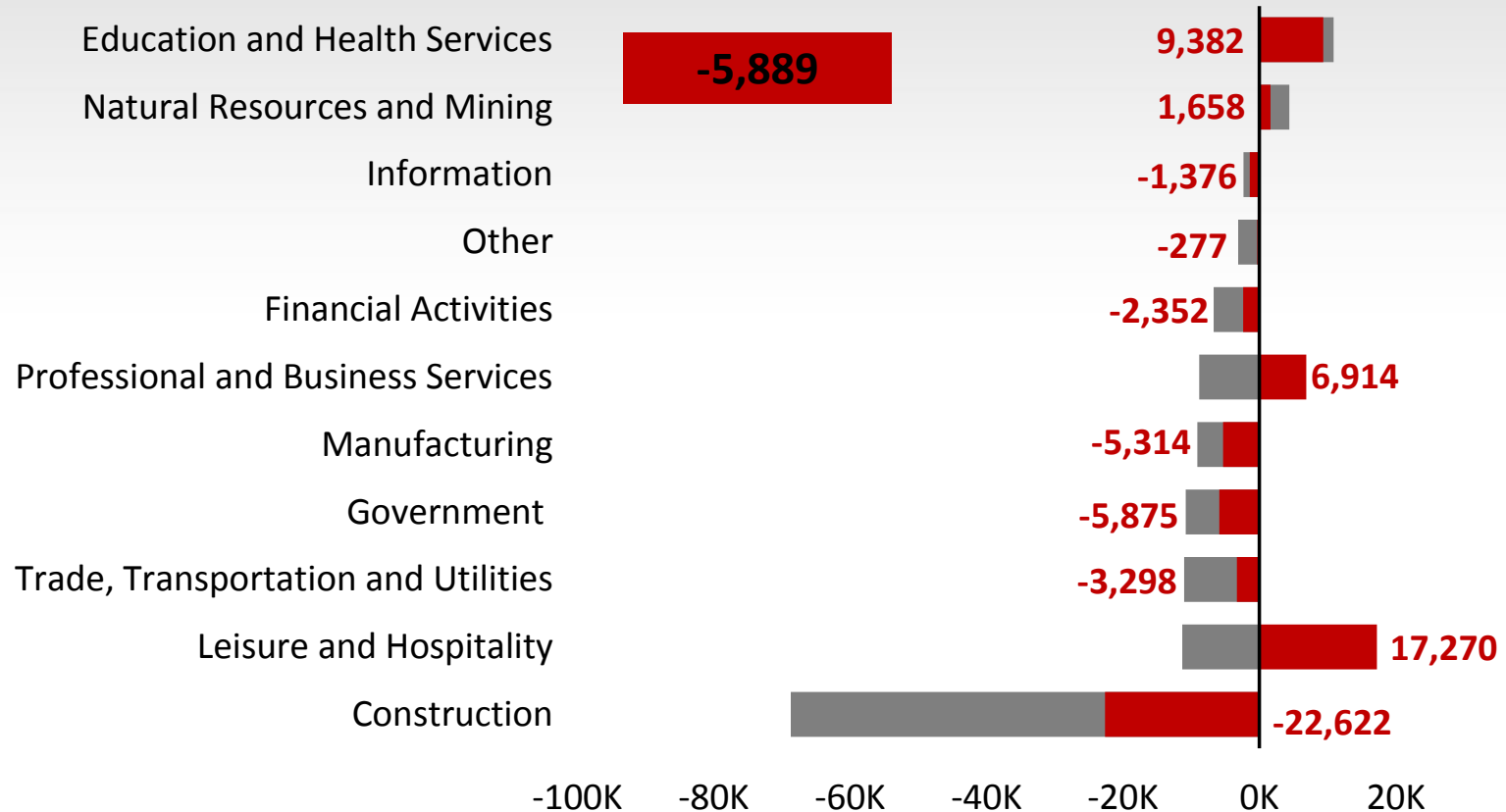
THE "NEW NEVADA"
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General Overview of Nevada's Economy



Nevada Shift-Share Analysis

Standardized Net Growth | Past 5 Years



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

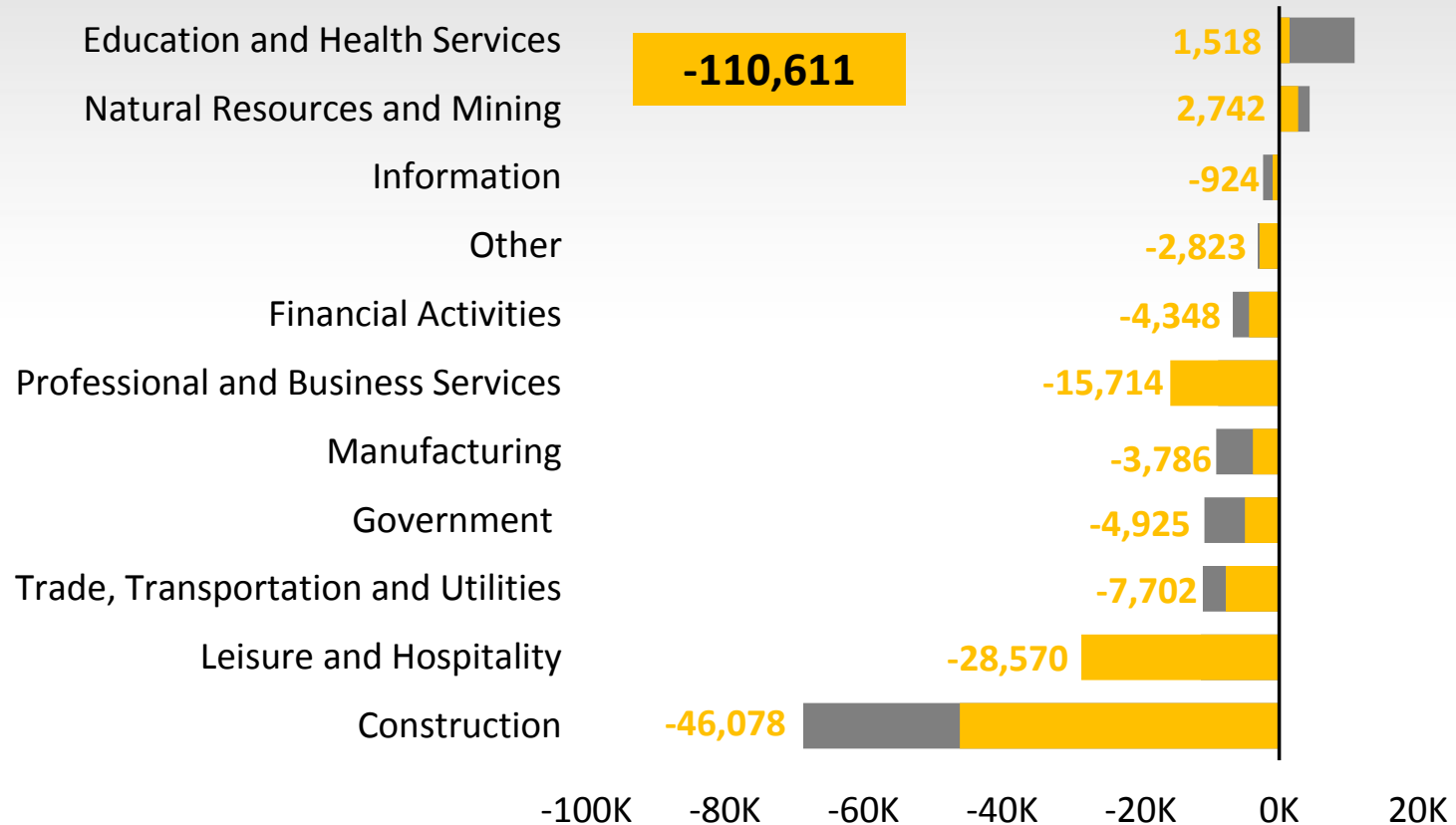
General Overview of Nevada's Economy



APPLIED
ANALYSIS

Nevada Shift-Share Analysis

Regional Shift Net Change | Past 5 Years



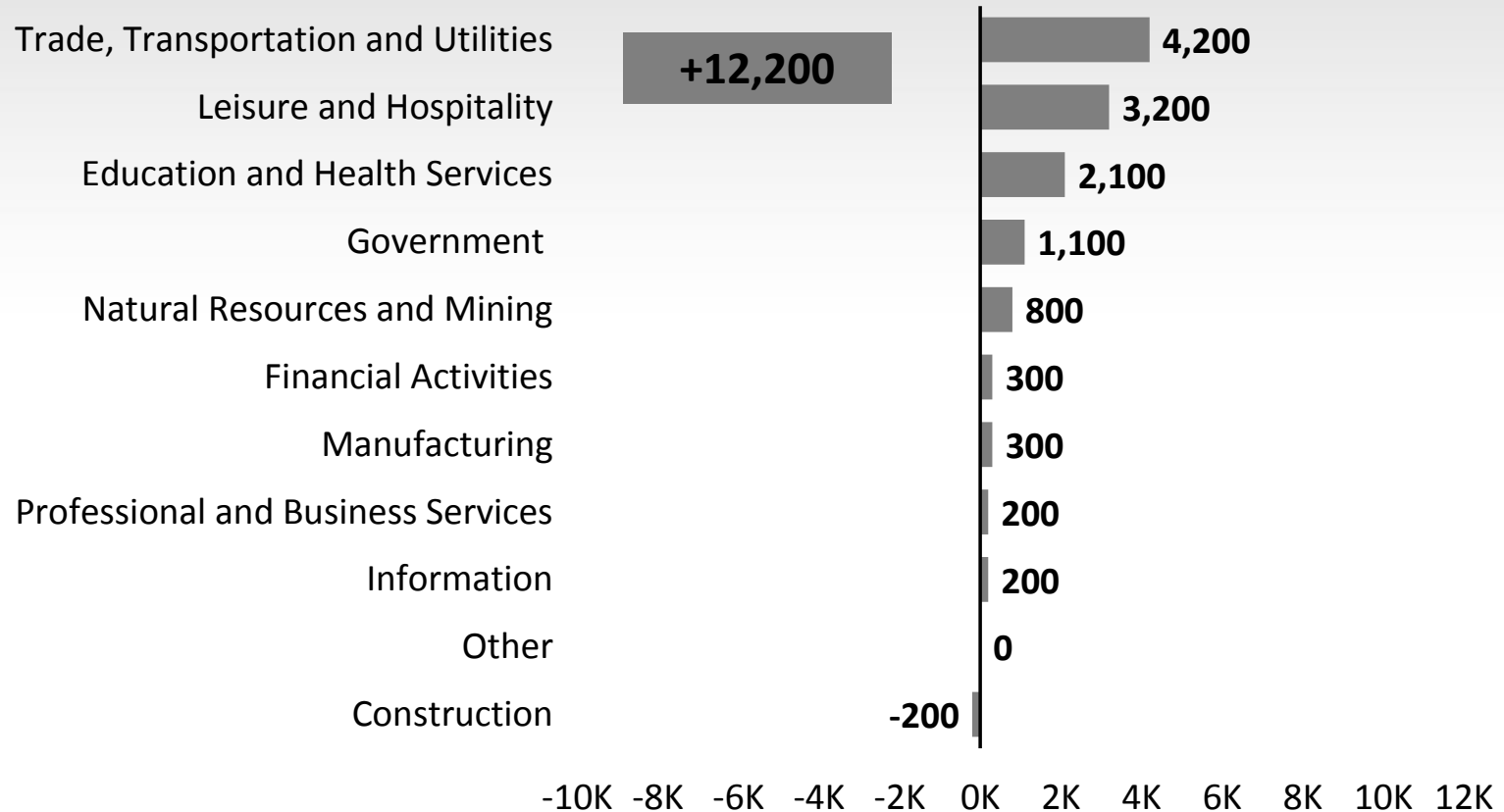
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General Overview of Nevada's Economy

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Nevada Shift-Share Analysis

Net Growth | Past 12 Months



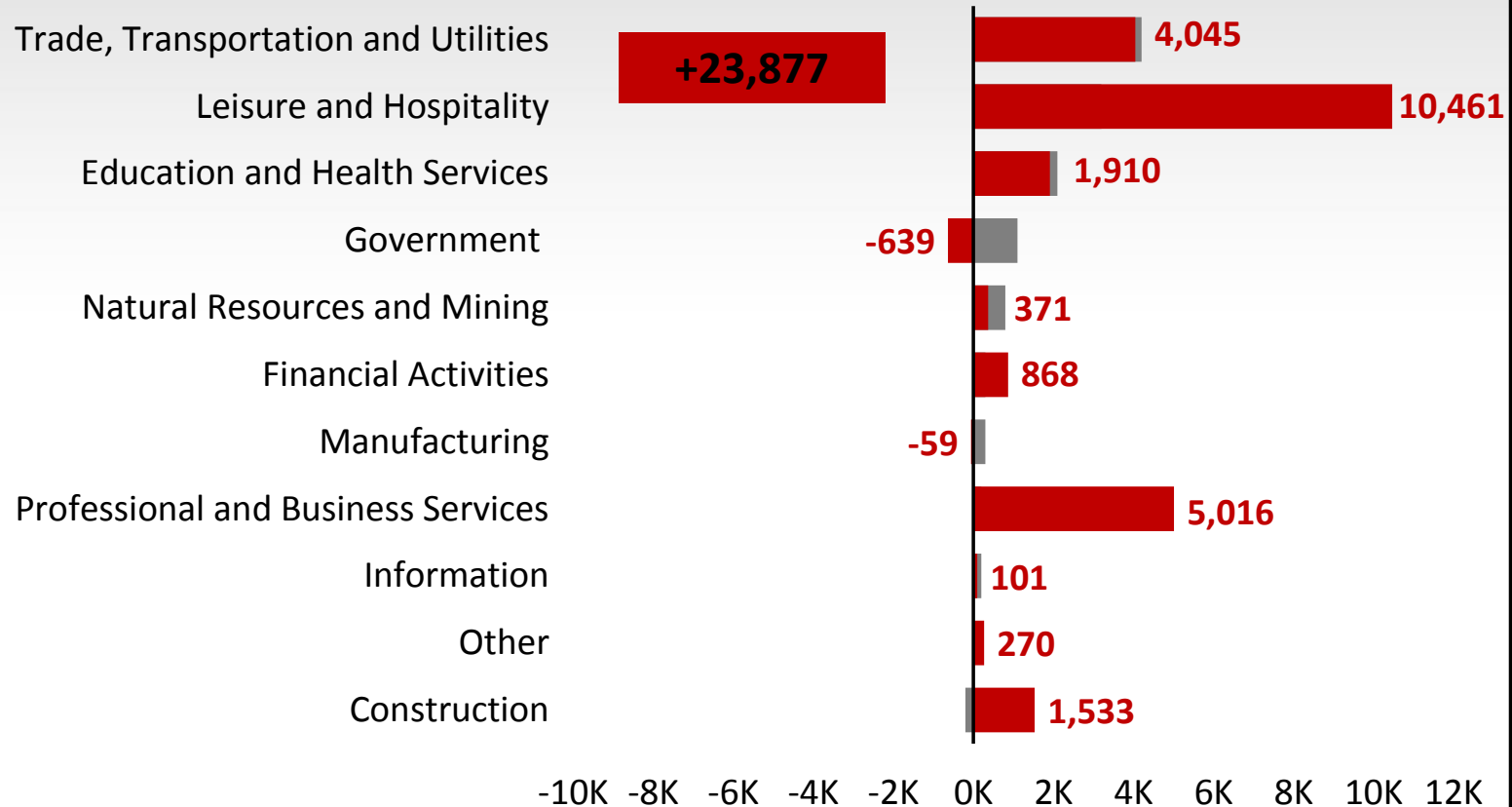
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Nevada Shift-Share Analysis

Standardized Net Growth | Past 12 Months



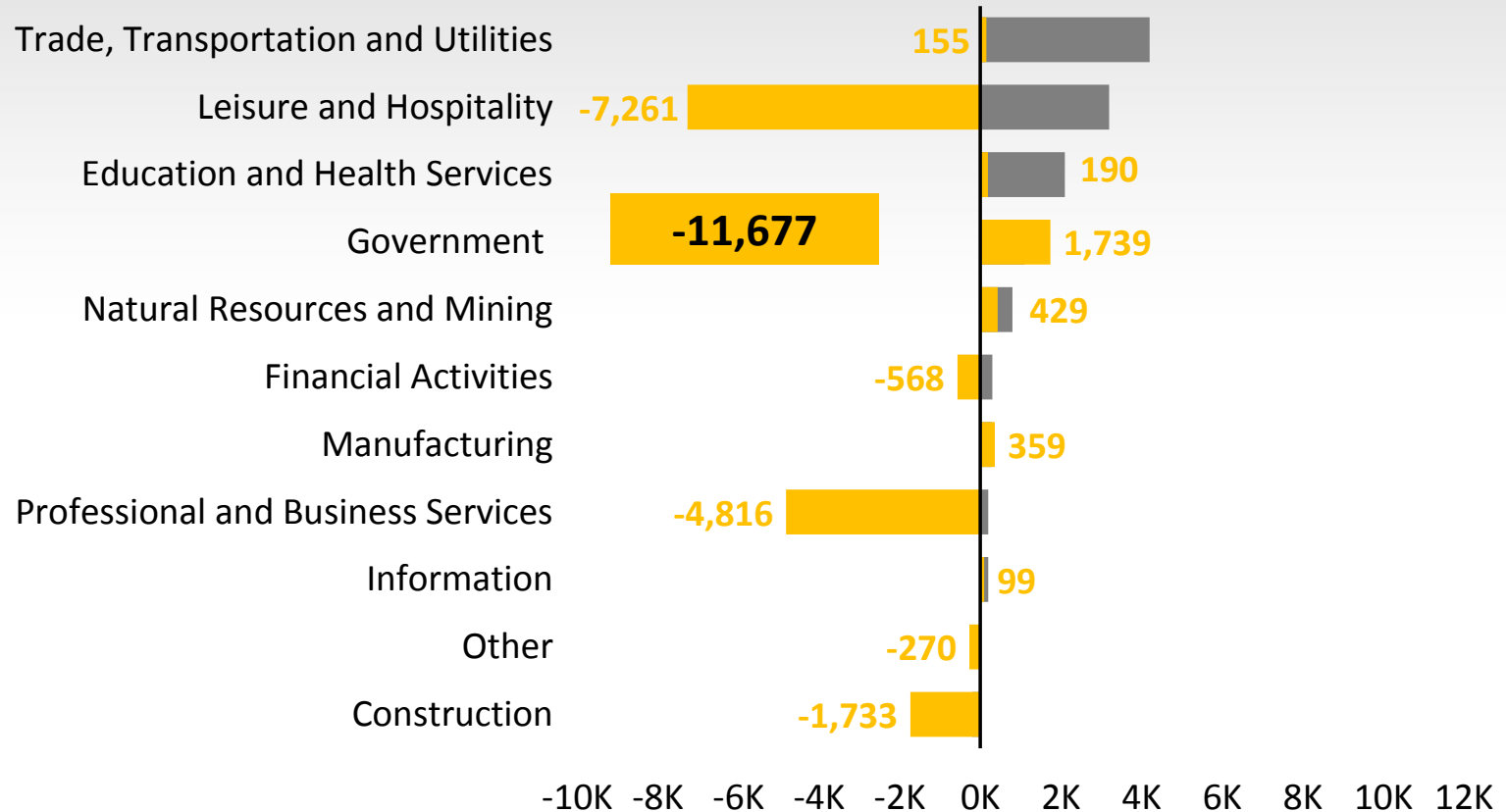
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Nevada Shift-Share Analysis

Regional Shift Net Change | Past 12 Months

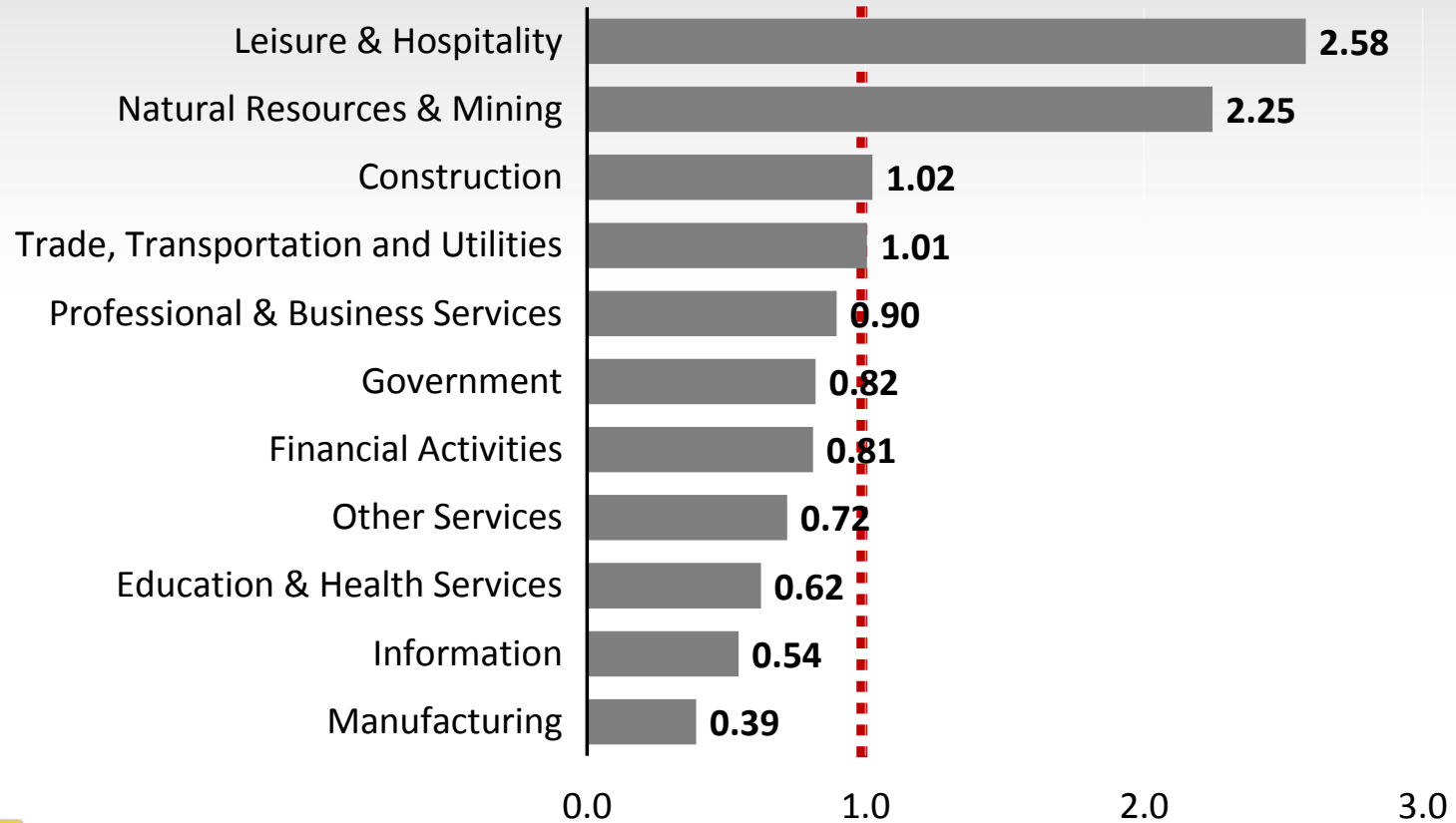


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IMAGINING WHAT COMES NEXT

General Overview of Nevada's Economy



Nevada Location Quotients By Major Industry

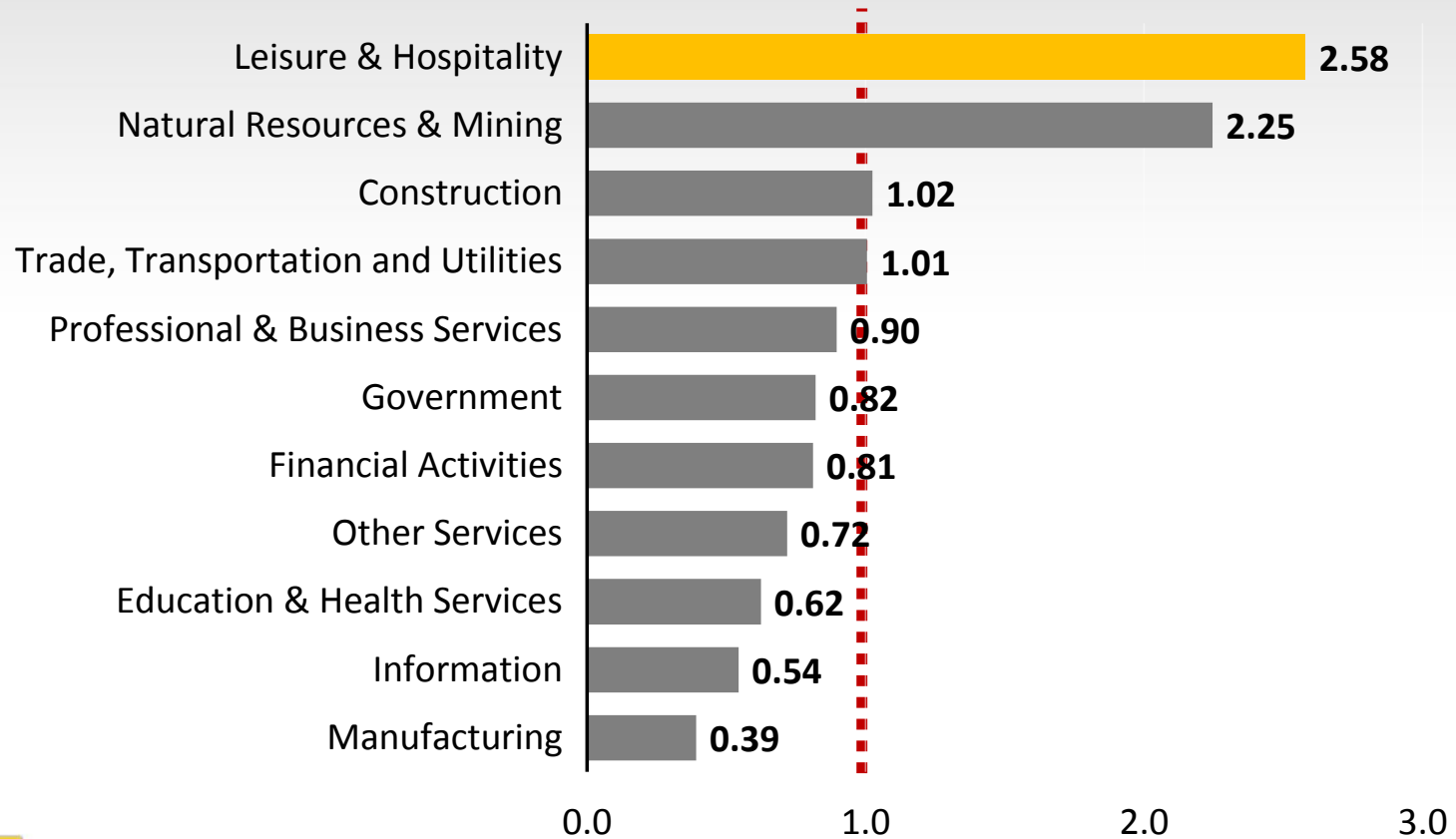


THE "NEW NEVADA"
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General Overview of Nevada's Economy

APPLIED ANALYSIS

Nevada Location Quotients By Major Industry

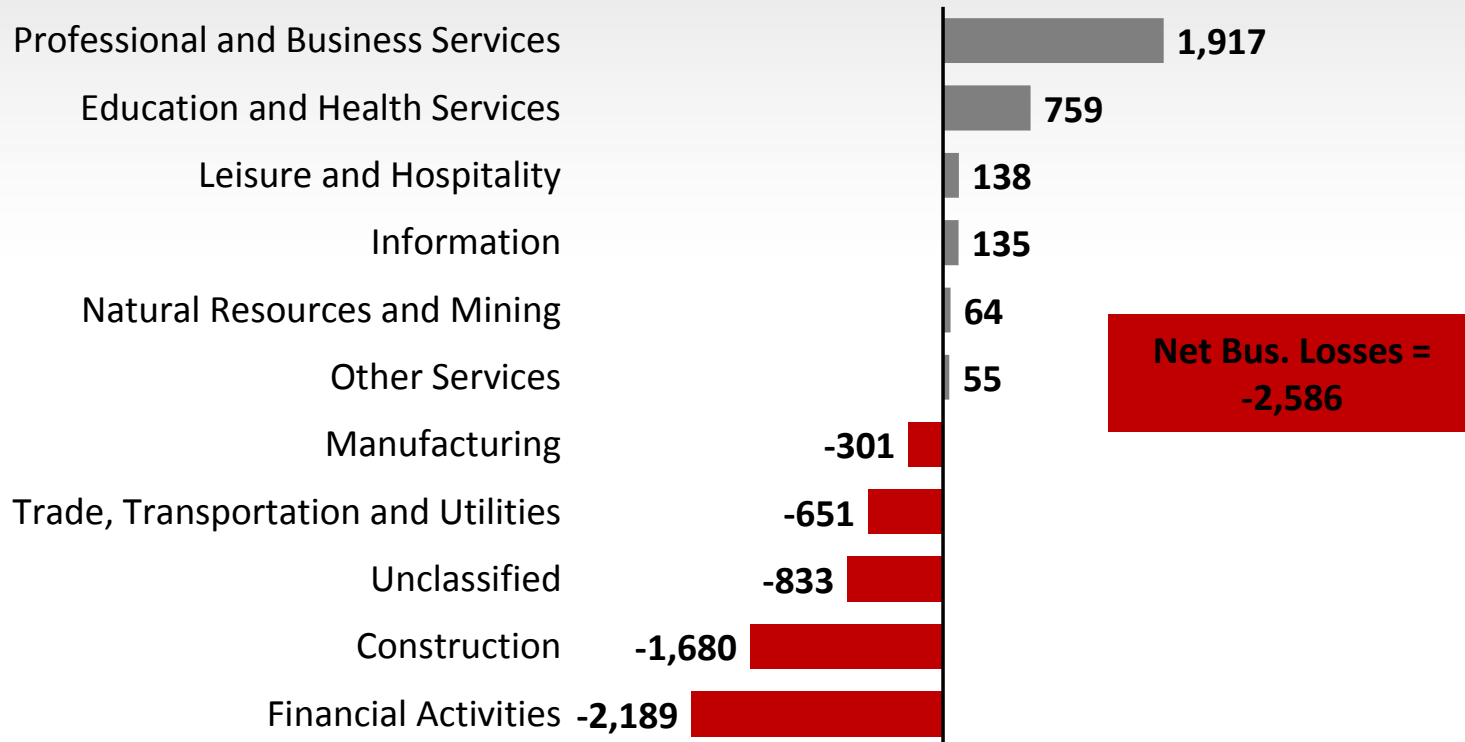


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General Overview of Nevada's Economy

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Nevada Business Growth Past 5 Years

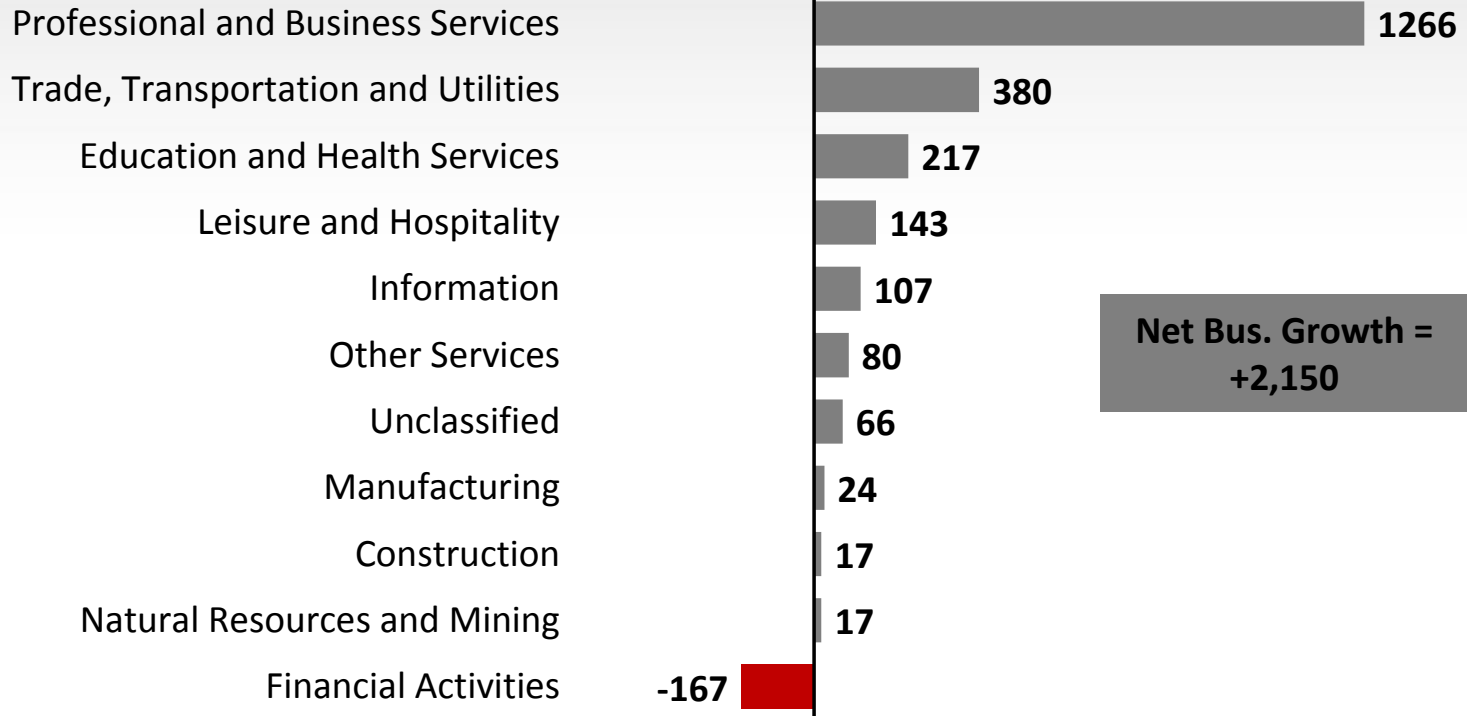


THE "NEW NEVADA"
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Nevada Business Growth Past 12 Months

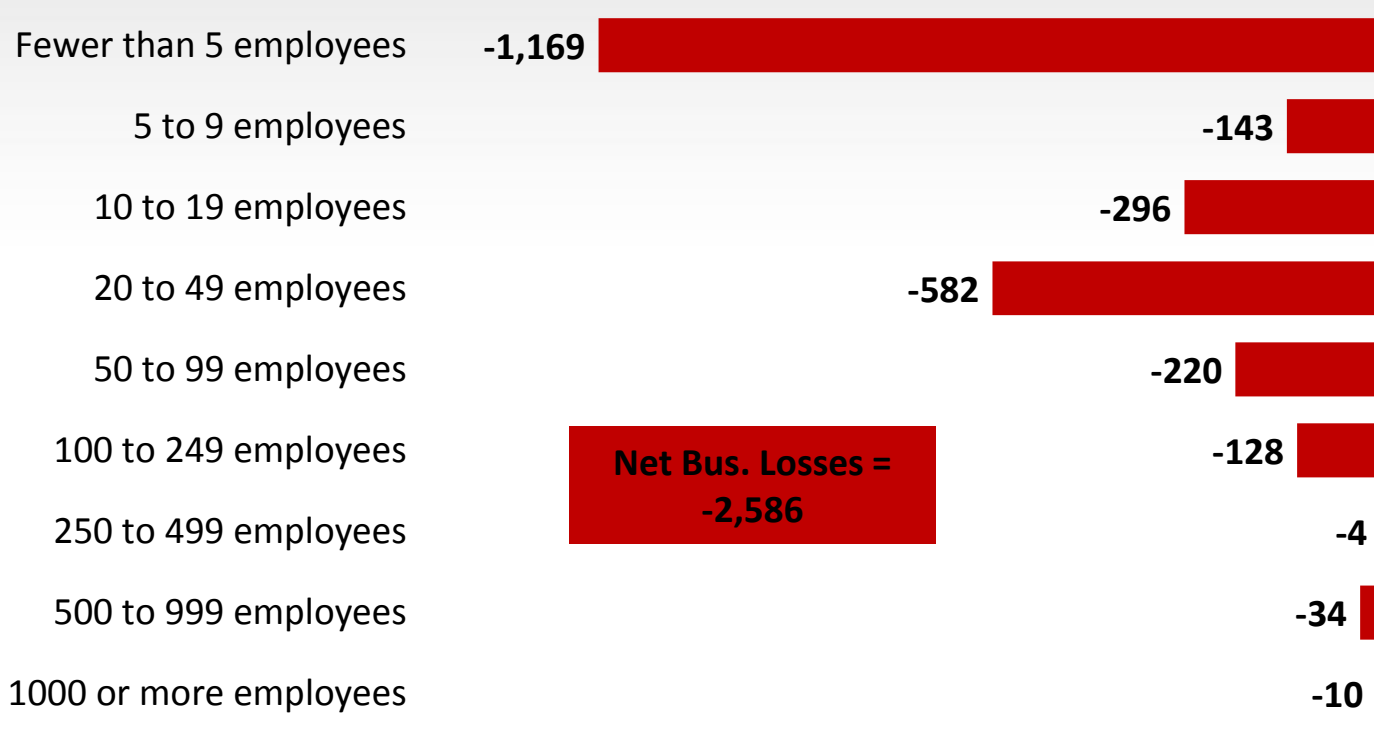


THE "NEW NEVADA"
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APPLIED ANALYSIS

Nevada Business Growth Past 5 Years



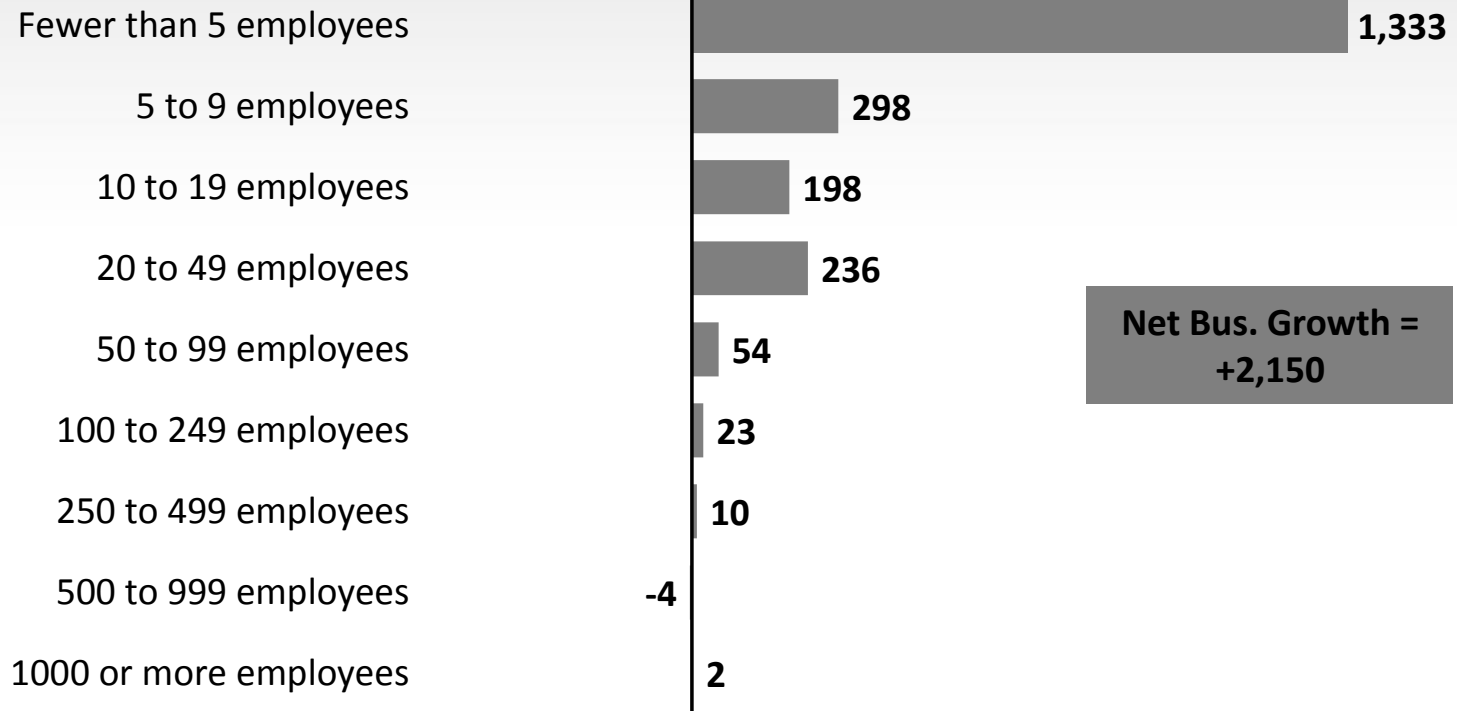
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Nevada Business Growth Past 12 Months

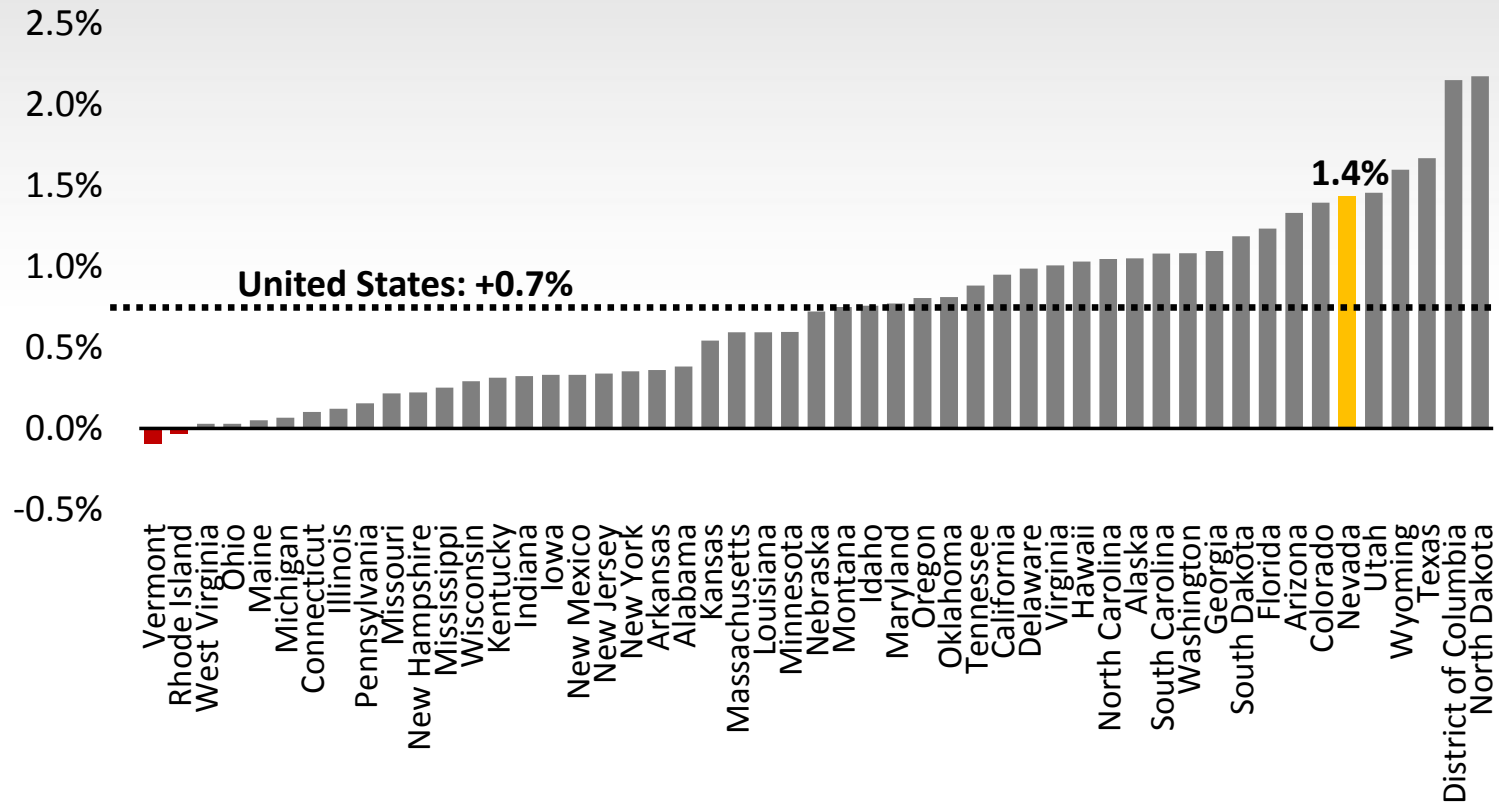


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General Overview of Nevada's Economy

APPLIED ANALYSIS

Population Growth by State



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General Overview of Nevada's Economy

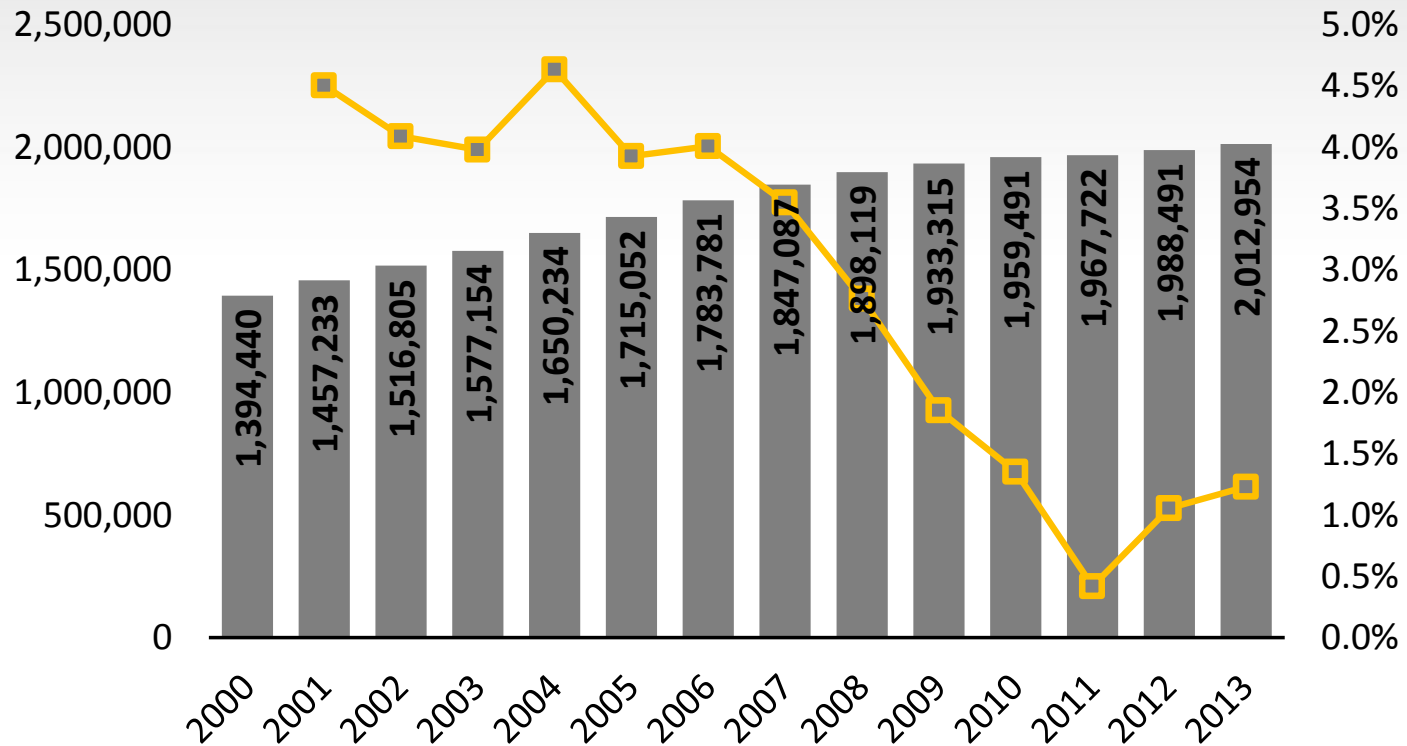
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September 20, 2013

Clark County Population

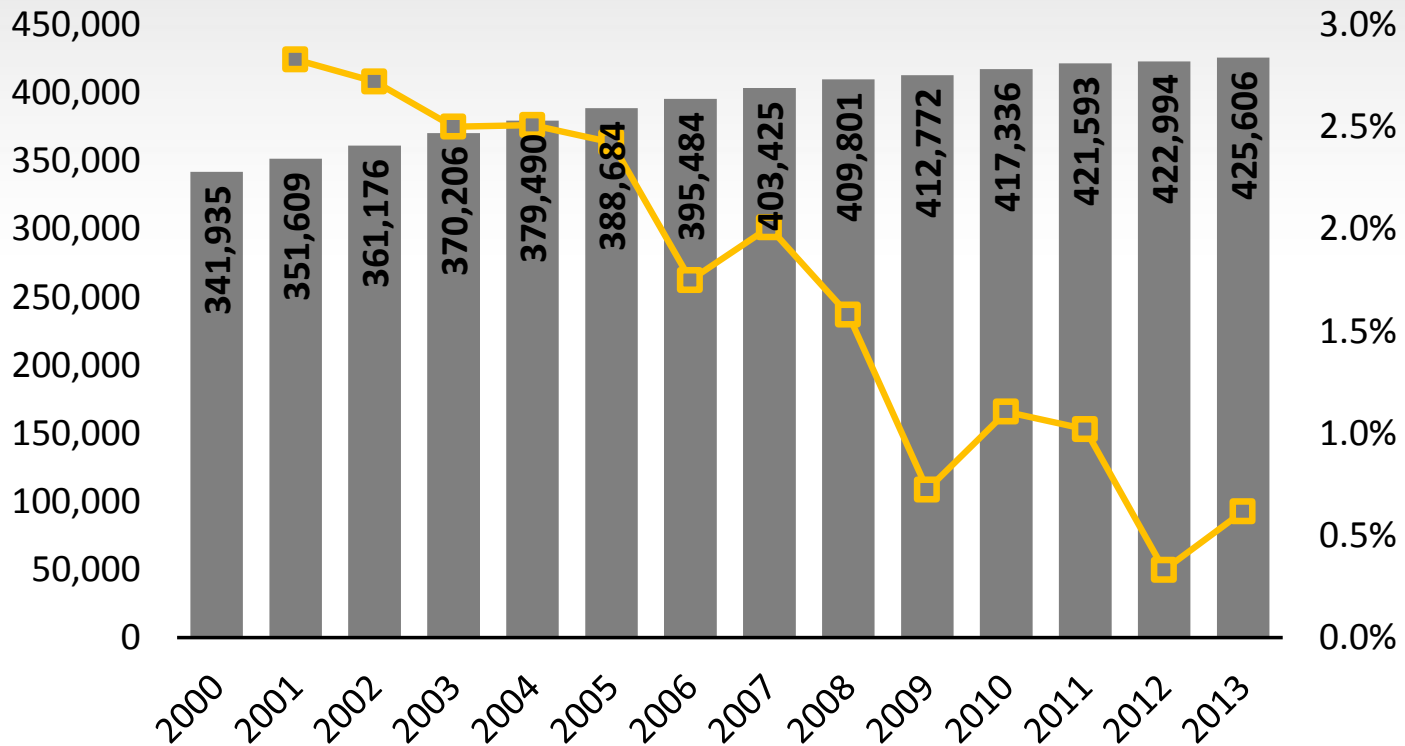


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APPLIED ANALYSIS 

Washoe County Population



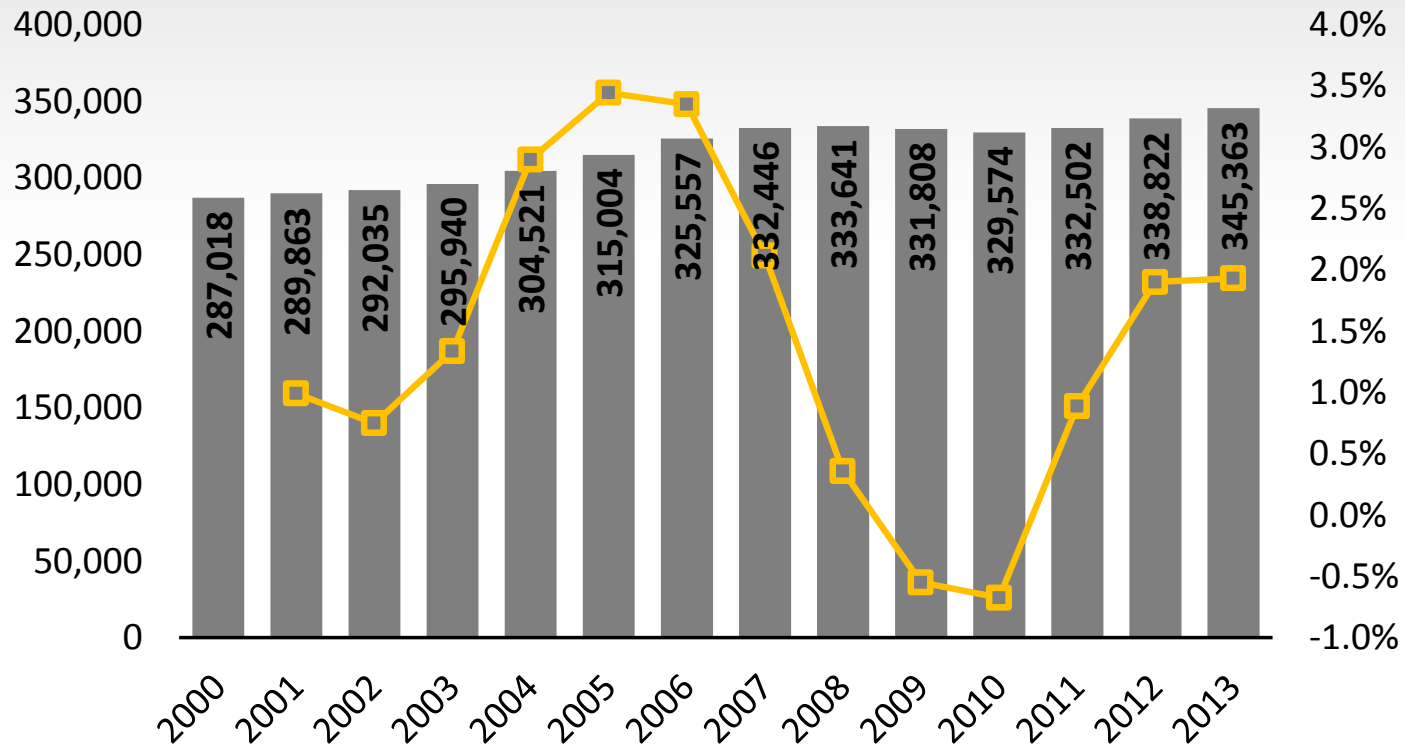
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General Overview of Nevada's Economy

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Balance of State Population



THE "NEW NEVADA"
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APPLIED ANALYSIS



COMPETITIVE POSITIONING



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

APPLIED
ANALYSIS 

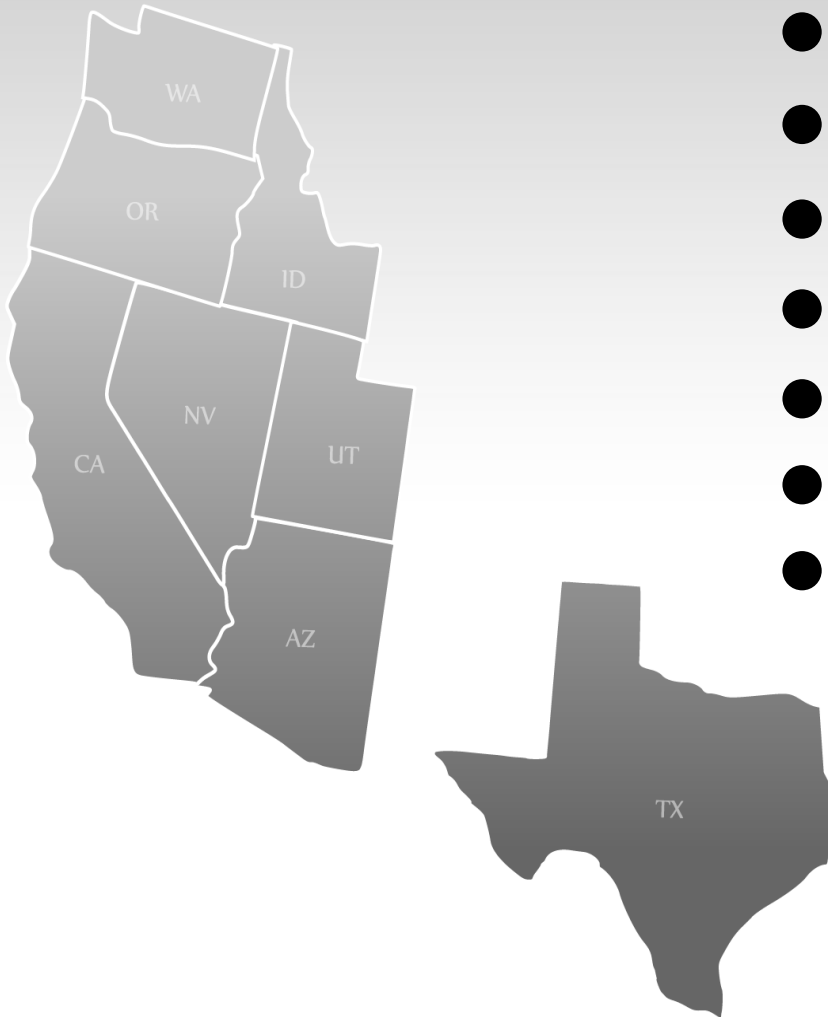
LABOR FORCE



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED
ANALYSIS 



- California: 18,610,172
- Texas: 12,785,608
- Washington: 3,490,437
- Arizona: 3,006,575
- Oregon: 1,924,547
- Utah: 1,401,163
- Idaho: 774,156



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- California: 18,610,172
- Texas: 12,785,608
- Washington: 3,490,437
- Arizona: 3,006,575
- Oregon: 1,924,547
- Utah: 1,401,163
- **Nevada: 1,372,702**
- Idaho: 774,156



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS



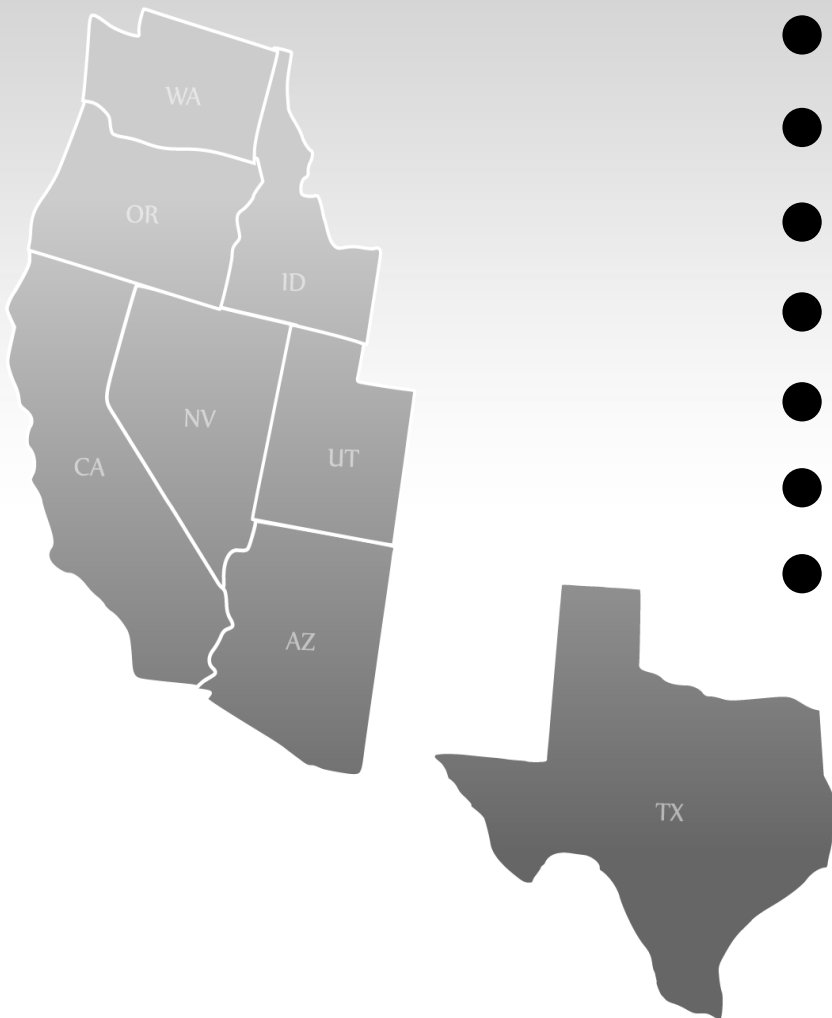
LABOR FORCE PARTICIPATION RATE



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED
ANALYSIS 



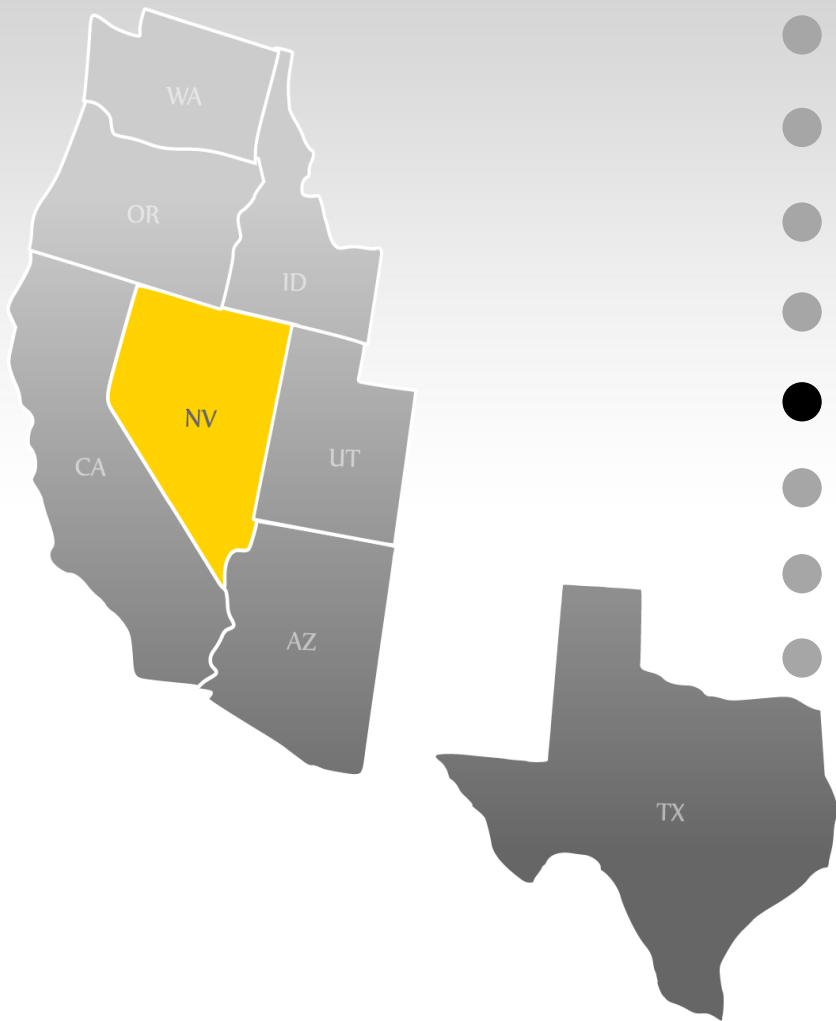
- **Utah: 67.9%**
- **Texas: 65.0%**
- **Washington: 64.1%**
- **Idaho: 64.2%**
- **California: 62.7%**
- **Oregon: 61.5%**
- **Arizona: 59.3%**



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- Utah: 67.9%
- Texas: 65.0%
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- California: 62.7%
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THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS

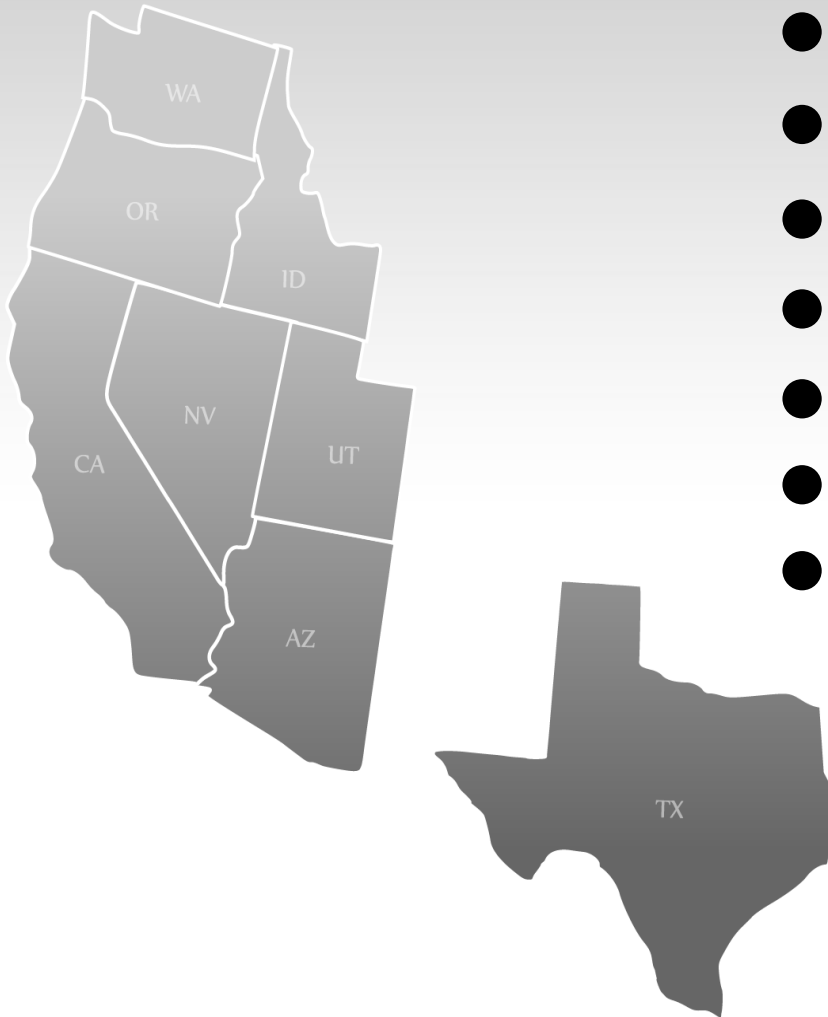
Average Age



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

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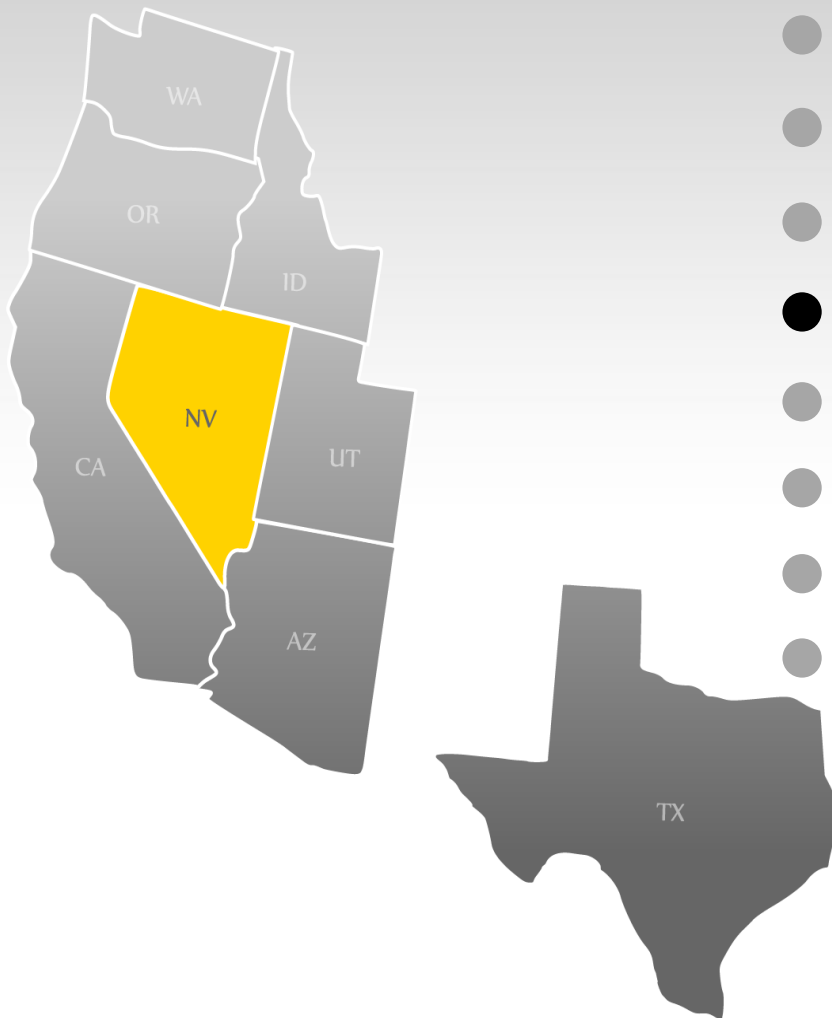
- Oregon: 39.3 Years
- Washington: 38.3 Years
- Arizona: 37.6 Years
- California: 37.0 Years
- Idaho: 36.6 Years
- Texas: 35.6 Years
- Utah 32.7 Years



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
- Idaho: 36.6 Years
- Texas: 35.6 Years
- Utah: 32.7 Years



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

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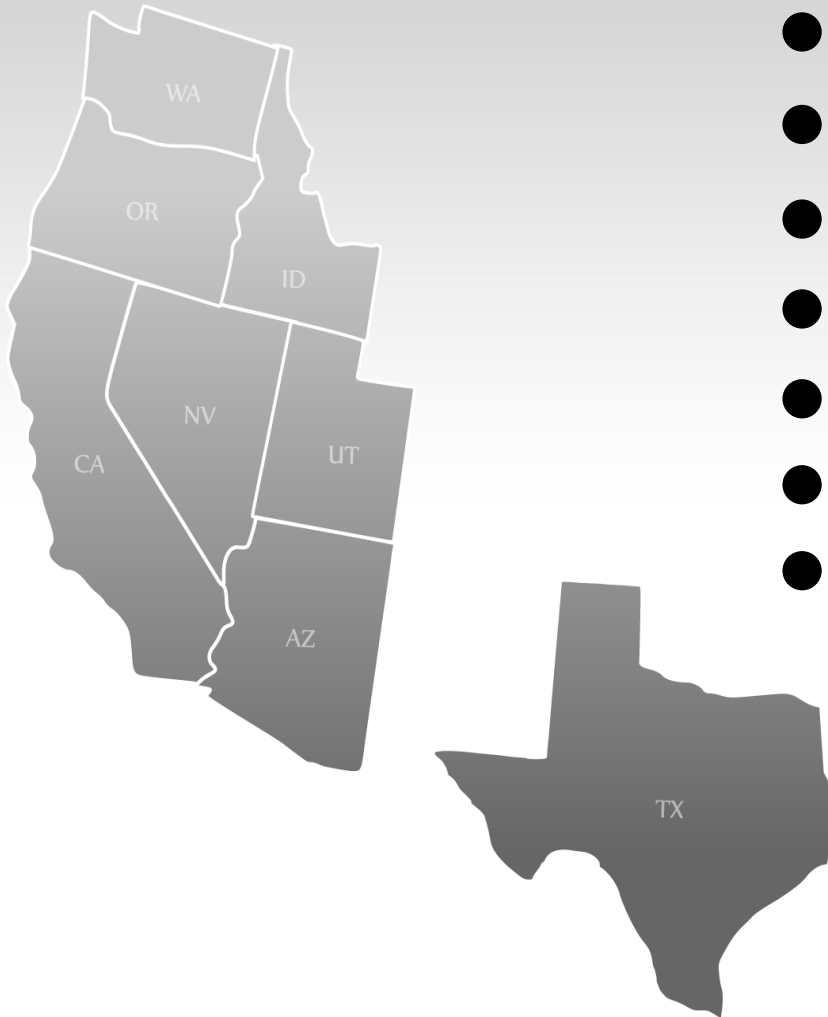
Personal Income



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

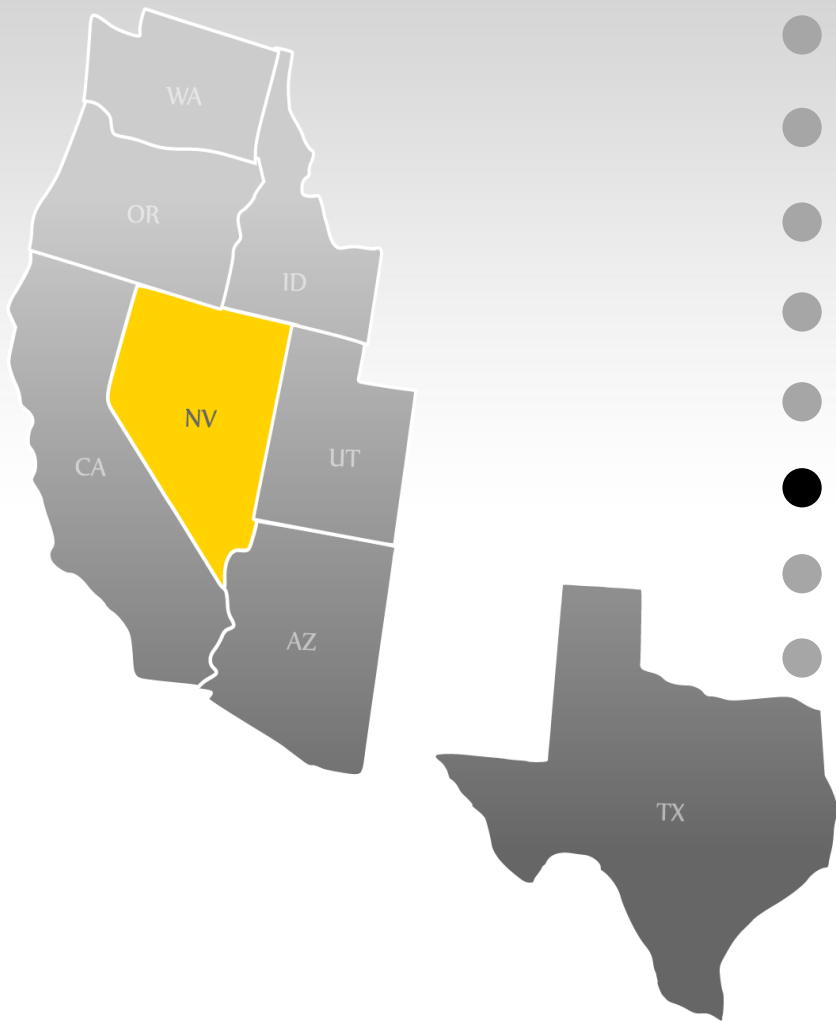
(In Millions of Dollars)



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



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



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS

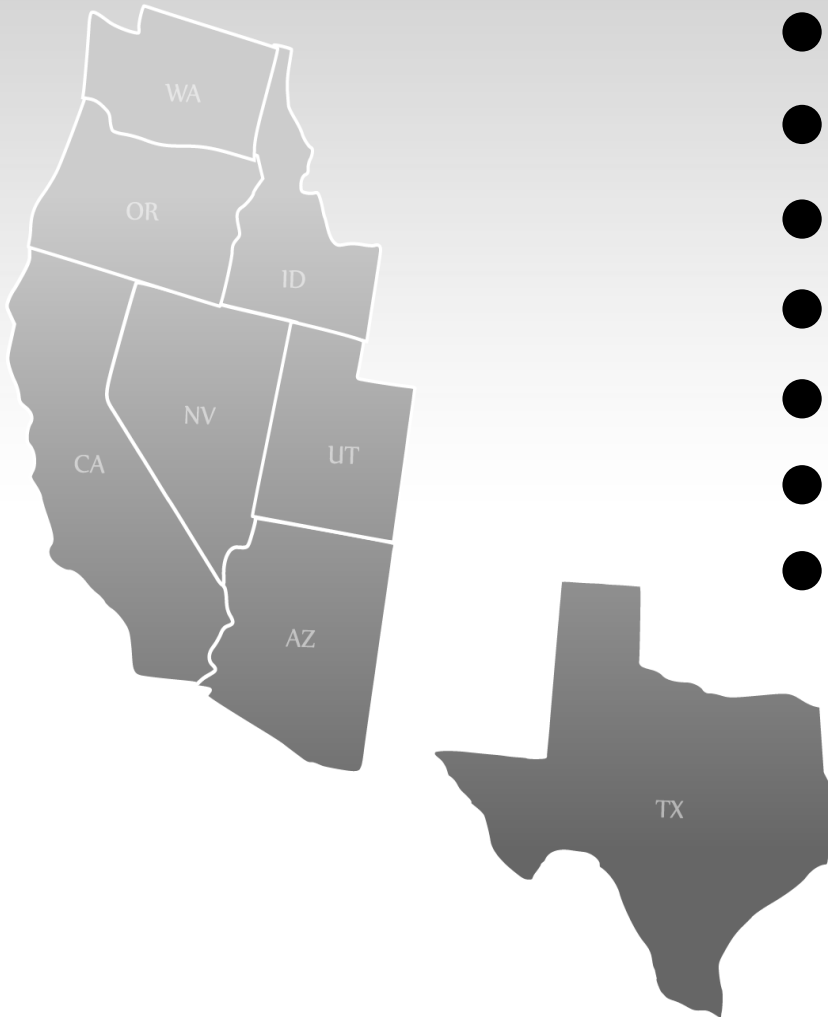
Personal Income Per Capita



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED
ANALYSIS 



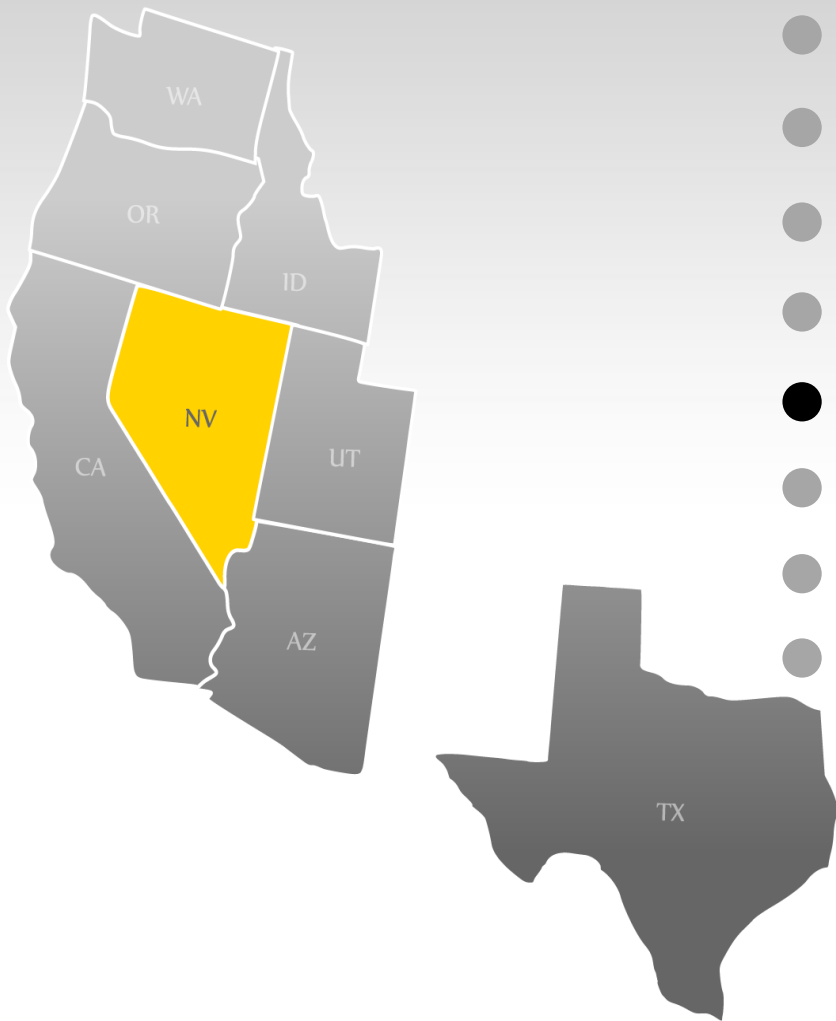
- Washington: \$45,413
- California: \$44,980
- Texas: \$41,471
- Oregon: \$38,786
- Arizona: \$35,979
- Utah: \$34,601
- Idaho: \$33,749



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- Washington: \$45,413
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- Texas: \$41,471
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IMAGINING WHAT COMES NEXT

Competitive Positioning



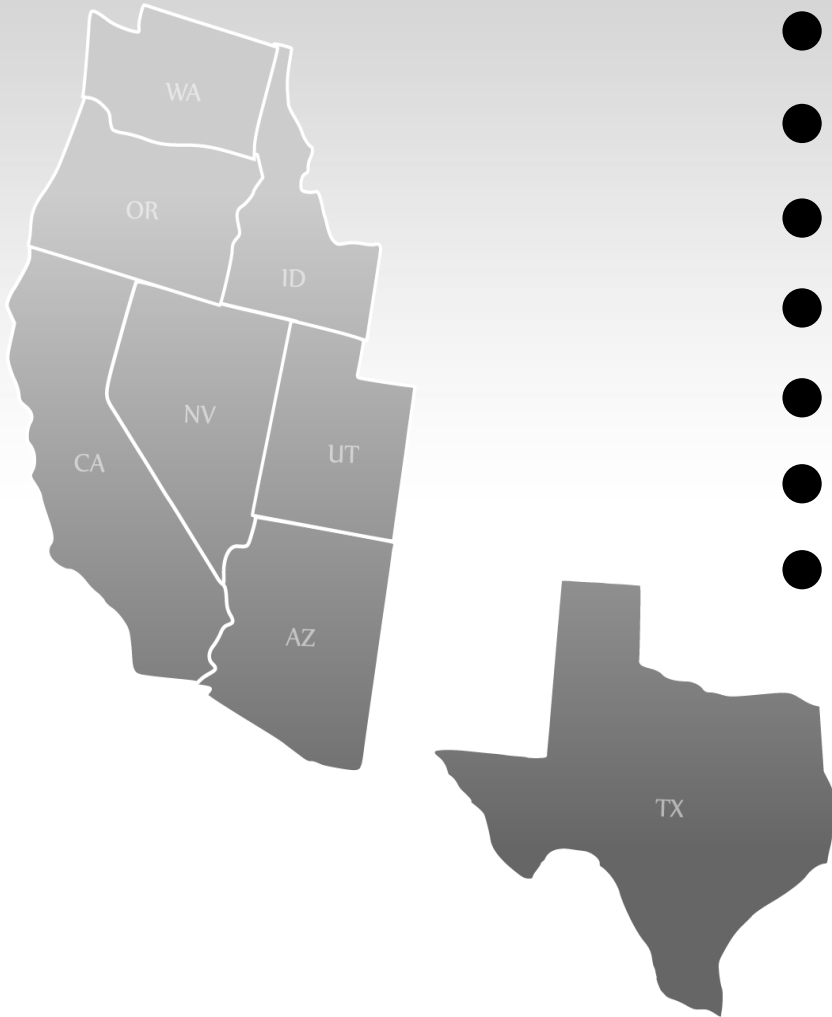
Adult Population w/Bachelor's Degree or Higher



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%**



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%**



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS

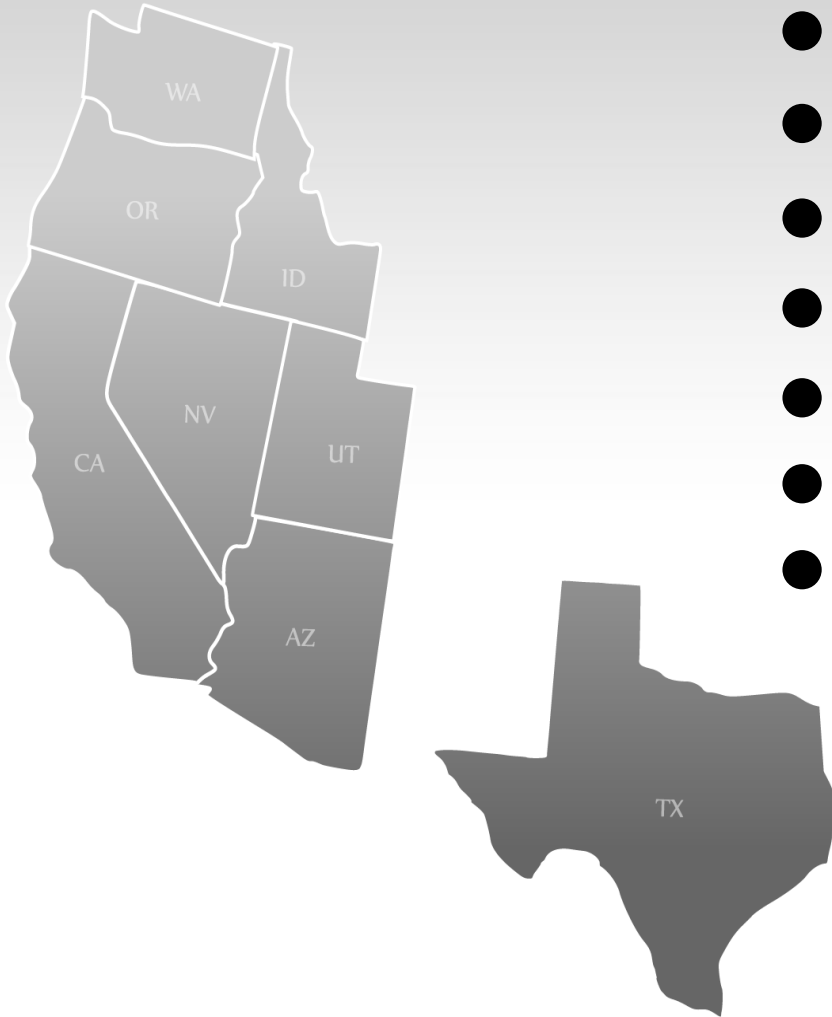
High School Graduation Rate



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED
ANALYSIS 



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



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- Idaho: 84.0%
- Texas: 78.9%
- Utah: 78.6%
- California: 78.2%
- Washington: 77.2%
- Oregon: 76.3%
- Arizona: 74.7%
- **Nevada: 57.8%**



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 

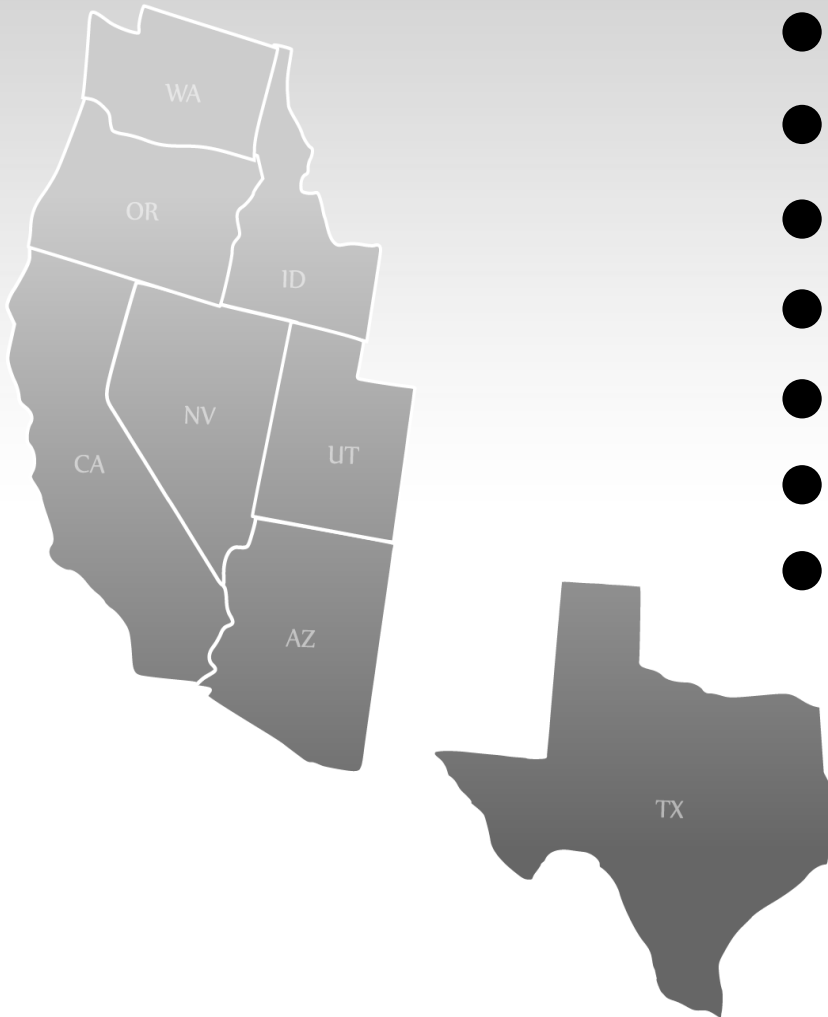
College/University Attendance



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED
ANALYSIS 



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



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



- Utah: 13.4%
- California: 11.1%
- Idaho: 10.4%
- Arizona: 10.2%
- Oregon: 10.0%
- Texas: 9.8%
- Washington: 9.0%
- **Nevada: 8.4%**



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 

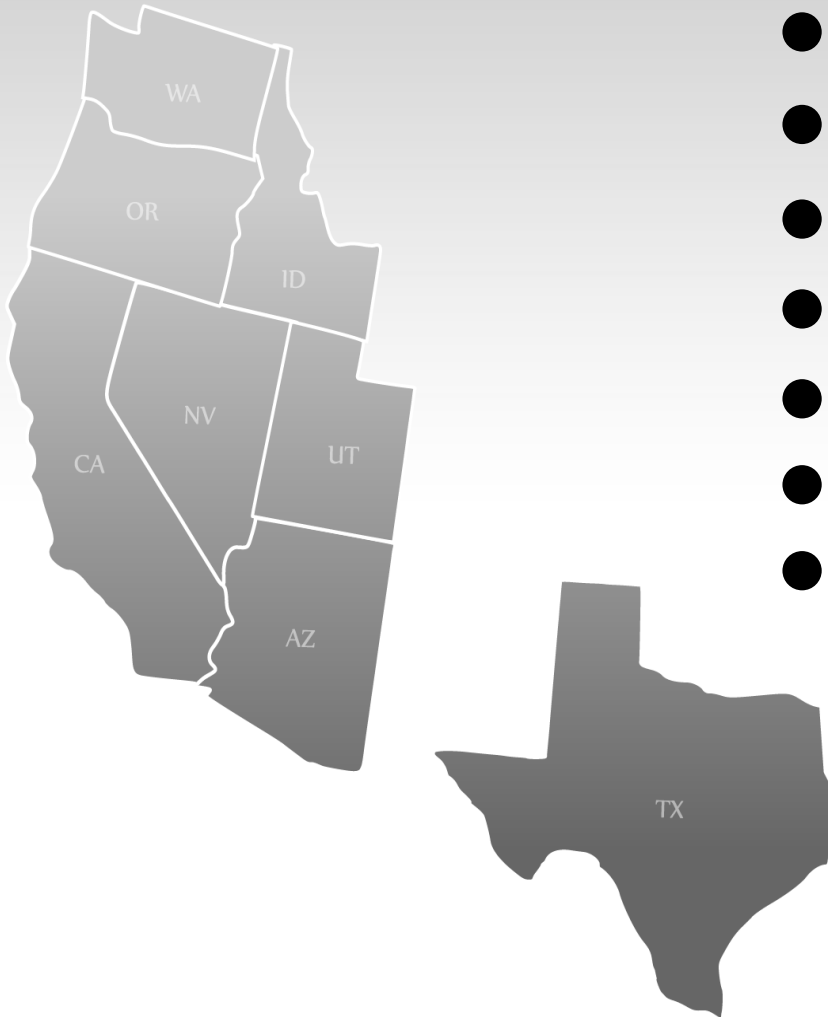
Speaks Language Other Than English at Home



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



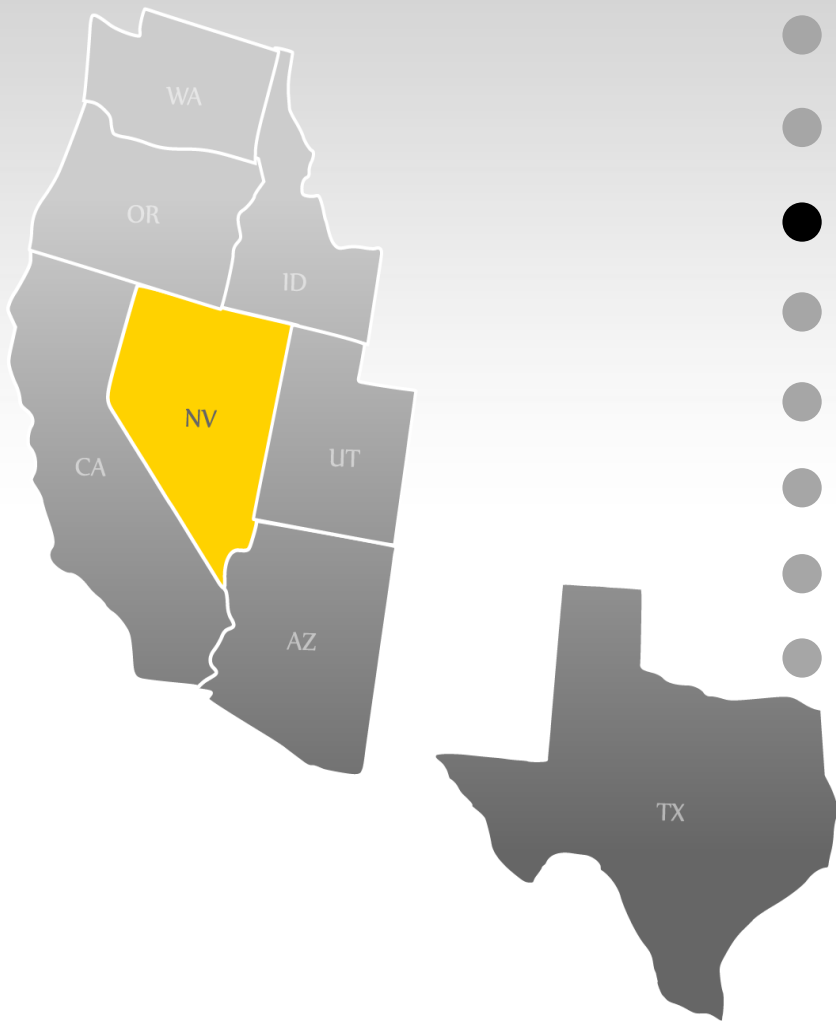
- **California: 43.8%**
- **Texas: 34.7%**
- **Arizona: 27.0%**
- **Washington: 18.6%**
- **Oregon: 14.9%**
- **Utah: 14.9%**
- **Idaho: 10.4%**



THE "NEW NEVADA"
IMAGINING WHAT COMES NEXT

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%

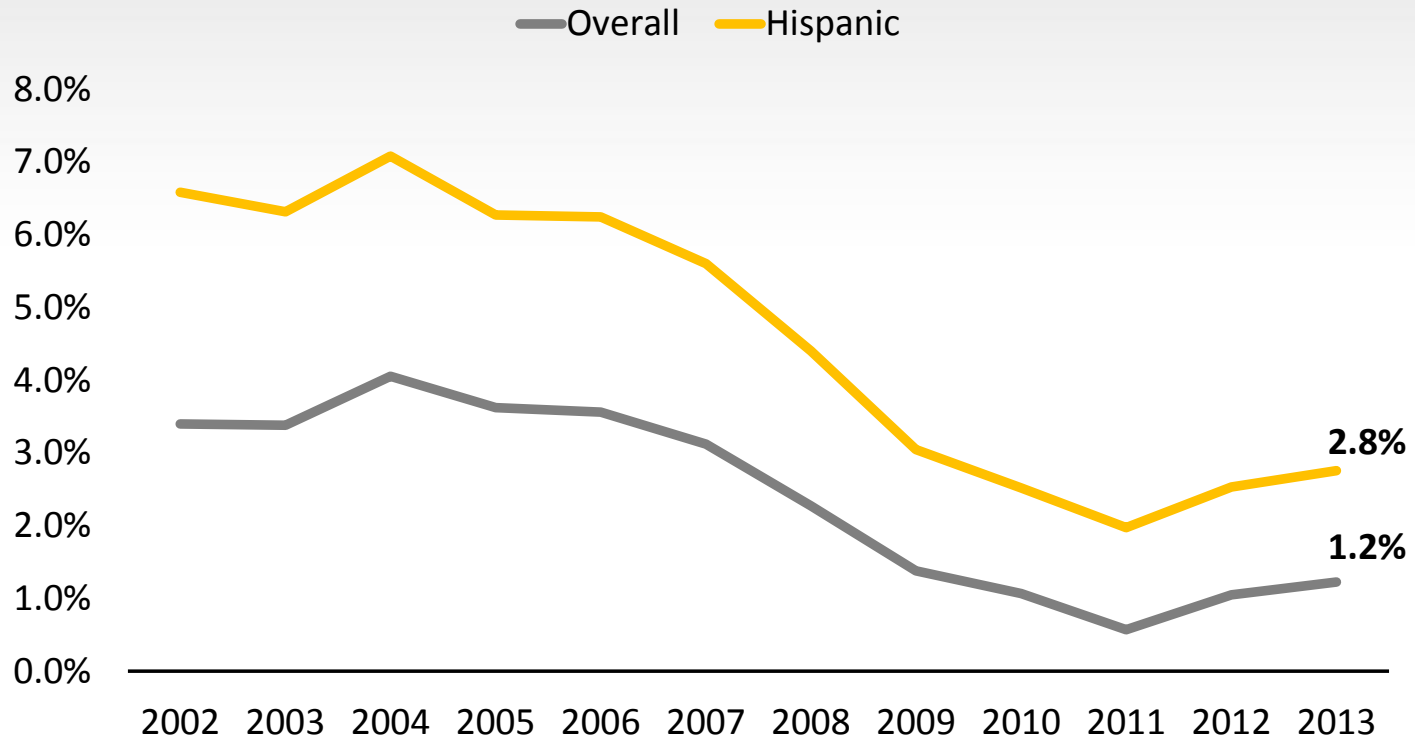


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IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS

Hispanic Population Growth Nevada



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IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS

Quality of Life

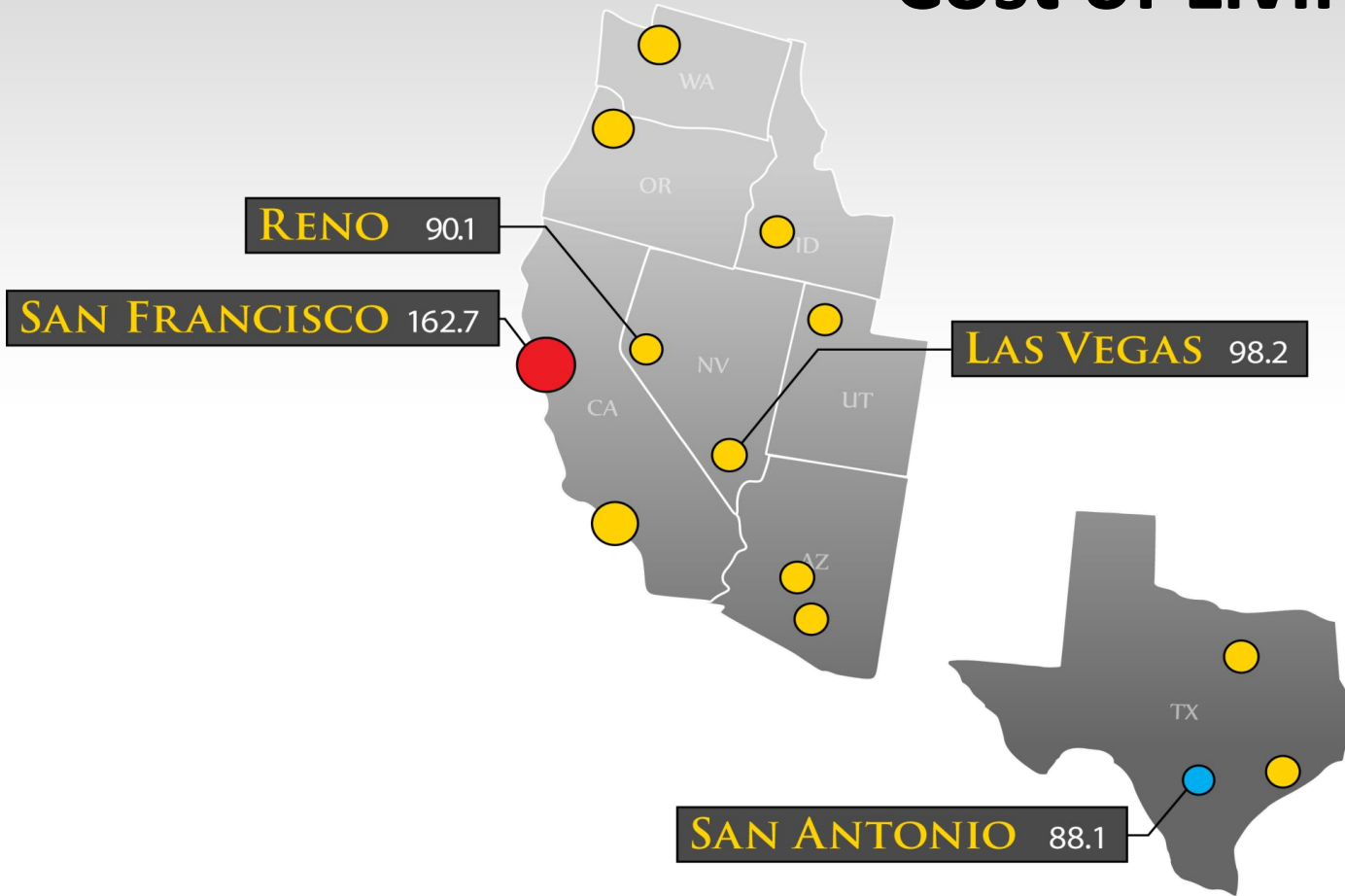


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IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED
ANALYSIS 

Cost of Living

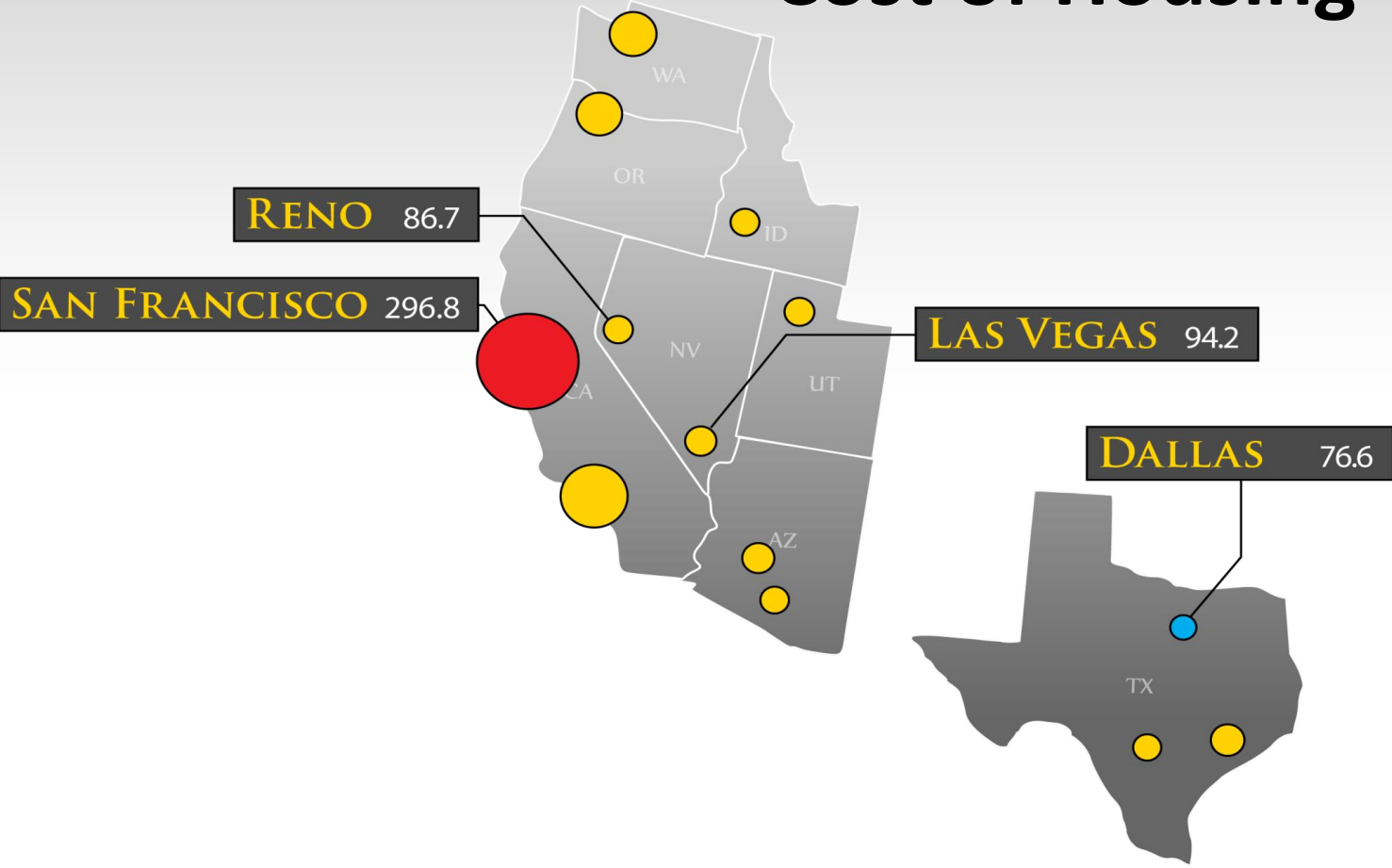


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IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS

Cost of Housing



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IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS



Perception



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IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 



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



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IMAGINING WHAT COMES NEXT

Competitive Positioning

APPLIED ANALYSIS 

“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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Competitive Positioning

APPLIED ANALYSIS



\$14.6 Billion



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APPLIED
ANALYSIS 



THE NEW NEVADA



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APPLIED
ANALYSIS 

Mega Trends

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



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IMAGINING WHAT COMES NEXT

The New Nevada

APPLIED ANALYSIS 

Technology is the Common Denominator



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ANALYSIS 

Mega Trends

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



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ANALYSIS 

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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ANALYSIS 

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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APPLIED
ANALYSIS 

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



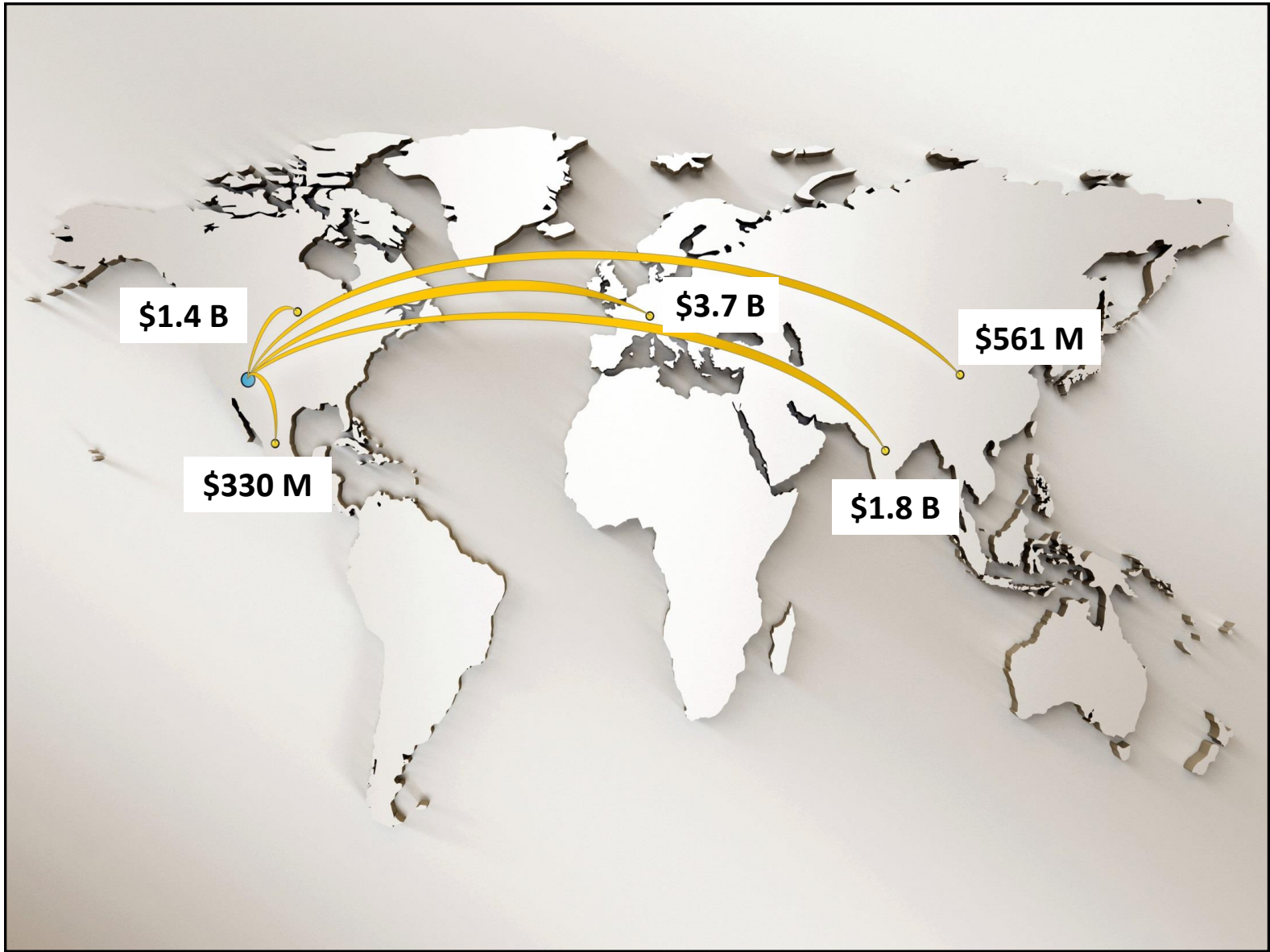
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WESTERN WLC LITHIUM



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Mining and Materials



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Fiscal

State and local taxes paid: \$431 million



Community

Charitable gifts: \$12 million

Volunteer hours: 7,800



Employment

Direct employment: 12,600

Total employment impacts: 29,400



Economic Output

Direct output: \$6.4 billion

Total economic output: \$8.8 billion



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Daily Gold Price



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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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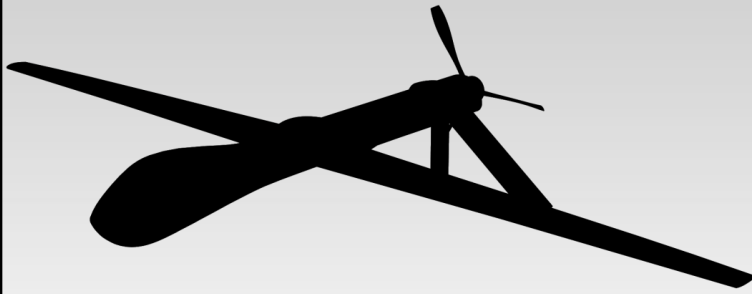
\$5.1 B



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APPLIED ANALYSIS 



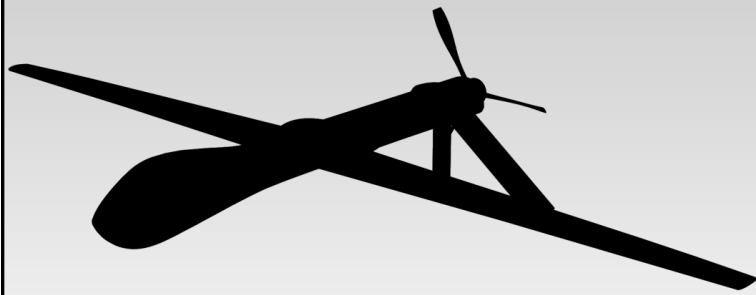
30,000 UAV



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IMAGINING WHAT COMES NEXT

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APPLIED ANALYSIS 



FAA Center of Excellence



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ANALYSIS 

**“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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IMAGINING WHAT COMES NEXT

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ANALYSIS 

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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Conceptual Design



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AMERICAN CASINO & ENTERTAINMENT
PROPERTIES, LLC



PLAYER VERIFY

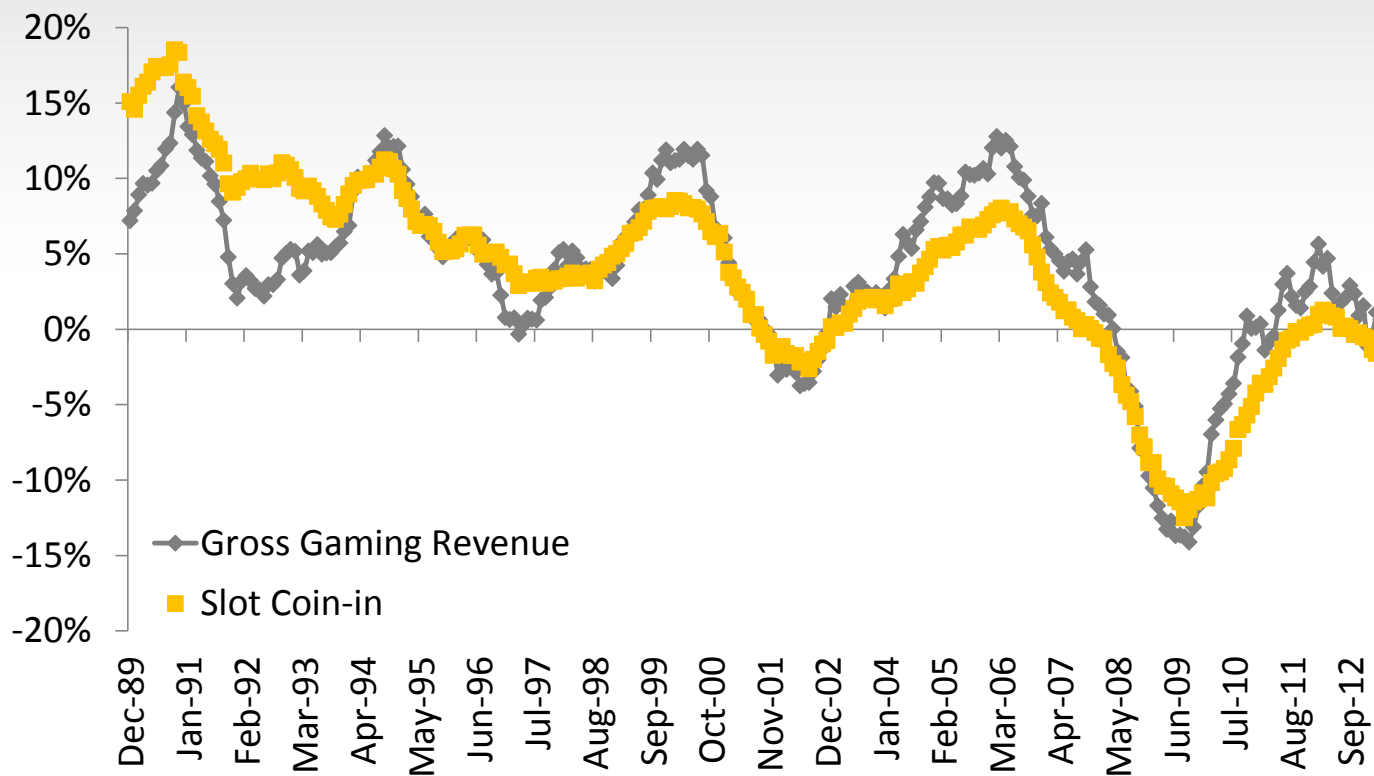


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Gross Gaming Revenue and Coin-In



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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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IMAGINING WHAT COMES NEXT



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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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