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FORT MOHAVE LANDS HIGHEST AND BEST USE ANALYSIS MARCH 2014



March 25, 2014

Mr. Jerry Stueve
Director-Department of Real Property Management
Clark County
500 S. Grand Central Parkway
Box 551825
Las Vegas, NV 89155-1825

Re: Mohave Lands Highest & Best Use Analysis ("the Study")

Dear Mr. Stueve:

The Consultant Team of RCG Economics LLC ("RCG"), Dr. Alan Schlottmann and Mr. Bob Cooper, CEcD are pleased to submit the referenced study to the Clark County Department of Real Property Management. The purpose of this report was to address the question: What are the potential highest and best use options for the County's 9,000-acre Southland site in Laughlin, Nevada?

Our report is comprised of four distinct analyses: 1) Site/Productivity Analysis, 2) Market Area Definition Analysis, 3) Demand and Supply Analysis and 4) Subject Capture Estimate.

RCG would like to thank the Department of Real Property Management, the Laughlin Town Manager's office and the Economic Development Office for their assistance and feedback on this very important study, and for their review of our report, as relevant. RCG hopes that this report accomplished the objectives stated herein and that it provides useful information in marketing the Southland Site. We recommend that the subject site's development management and marketing be undertaken by the most qualified private sector entity or entities to insure that Clark County optimizes the site's highest and best use potential.

If you have any questions, please do not hesitate to contact us at your convenience by phone at 702-967-3188 ext. 401 or by email at jrestrepo@rcg1.com.

Regards,

RCG Economics LLC

RCG Economics LLC

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Standard Assumptions & Limiting Conditions

STANDARD ASSUMPTIONS & LIMITING CONDITIONS

1. The Consultant Team prepared this Study from third-party information collected by the Consultant Team, as well as our internal real estate, economic and demographic models and databases.
 2. Clark County is responsible for representations about its plans and expectations and for disclosure of significant information that might affect the ultimate realization of the analyses results.
 3. The results of the Consultant Team's analyses apply only to the effective date of this Study. The success of Clark County's plans will be affected by many related and unrelated real estate economic conditions within a local, regional, national and/or world context. We assume no liability for an unforeseen change in the economy. Accordingly, we have no responsibility to update this Study for events and circumstances occurring after the date of this Study.
 4. This Study is based on current real estate and economic benchmark information. Thus, variations in the future could be material and have an impact on our conclusions. Even if the Study's hypothetical assumptions were to occur, there will usually be differences between the estimated and actual results, because events and circumstances frequently do not occur as expected, and those differences may be material. These could include major changes in economic conditions and benchmarks; and/or major revisions in current state and/or federal tax or regulatory laws.
 5. If this Study is reproduced by Clark County, it must be reproduced in its entirety.
 6. The Consultant Team makes no representation or warranty as to the accuracy or completeness of the third party information contained in this Study, and shall have no liability for any representations (expressed or implied) contained in, or for any omissions from, our materials.
 7. The working papers for this consulting assignment will be retained in The Consultant Team's files and will be made available for your reference. We will be available to support the analyses, as required.
 8. Good and marketable title to the Southland site ("subject site") has been assumed. We are not qualified to render an "opinion of title," and no responsibility is assumed or accepted for matters of a legal nature affecting the site. No investigation of legal title will be made, and we will render no opinion as to ownership of the site or condition of their titles.
 9. It will be assumed that there are no site encroachments, easements or trespasses, unless noted within this Study. We will not make a survey of the site's' acreage, and no responsibility is assumed in connection with any matter that may be disclosed by a proper survey. If subsequent surveys should reflect a differing land area and/or frontages, the Consultant Team reserves the right to change our final report, at your expense.
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Standard Assumptions & Limiting Conditions

10. All maps, plats, site plans or photographs that are incorporated into this Study are for illustrative purposes only, but are not guaranteed to be exact. Dimensions and descriptions will be based on public records and/or information furnished by others and are not meant to be used as a reference in legal matters of survey.
11. It is assumed that subject site's development management, marketing and operations will be under by competent and experienced management, and that site ownership will be in responsible hands. The quality and experience of management can have a direct effect on a project's economic viability. This Study assumes both responsible ownership and competent management unless noted otherwise. Any variance from this assumption could have a significant effect on the performance of the Southland Site's development program.
12. We assume that there are no hidden or unapparent conditions relating to the subject site's soil or subsoil that could affect their operations. No responsibility is assumed for such conditions, or for engineering that might be required to discover such factors.
13. The existence of potentially hazardous material on the Southland Site's acreage, such as the presence of asbestos, lead paint, toxic waste, underground tanks and/or any other prohibited material or chemical, which may or may not be present on or in the subject site, will not be evaluated by the Consultant Team. The existence of these potentially hazardous materials may have a significant effect on the Southland Site's development potential. This Study assumes that the subject site's acreage is "clean" and free of any of these adverse conditions unless we are notified, to the contrary, in writing.
14. Unless otherwise stated in our report, no effort will be made to determine the possible effect, if any, on the Southland site's development of future Federal, State or local legislation, including any environmental or ecological matters or interpretations thereof. We will not perform an audit, review or examination or any other attest function (as defined by the AICPA) regarding any of the third-party historical market, industry and economic benchmarks or demographic information used or included in this Study; therefore, The Consultant Team does not express any opinion or any other form of assurance with regard to the same in the context of this Study.

SITE LOCATIONAL & SWOT ANALYSIS

I. SITE ANALYSIS

The Southland site is in the southernmost part of Nevada, bordering both California and Arizona. The Needles Highway offers direct access through the site to both Laughlin and Needles. In this section, the Consultant Team rated the subject site's characteristics in the context of its development potential and the Laughlin area's location in a regional context. Corresponding figures and tables are at the end of this section.

A. Subject Property Description

As noted, the Southland site is comprised of 9,000 acres (See Exhibit I-2). Based on this high-level analysis, the subject site appears to be physically adequate for development. The Consultant Team's conclusions derived from discussions with a variety of sources familiar with the subject site and two field visits taken during the course of our research.

- **Natural Features** – The subject site has a largely vast, open desert terrain. The section of the site on the east side of the Needles Highway is near to the Colorado River and is characterized by floodplain and riparian vegetation. With the exception of some dirt roads and trails, the subject site is undeveloped land.

Soil composition can be important to any development to ensure its suitability for building. The Consultant Team did not assess underlying soil conditions. However, according to the "Feasibility Study for Laughlin 400 Acres" prepared by VTN for three sites on the west side of the Needles Highway, soil samples of the subject site are classified as the Carrwash and Riverbend types. The Carrwash type consists of extremely gravelly coarse sand to very gravelly loamy coarse sand. The Riverbend type consists of stratified extremely gravelly coarse

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sand to very gravelly loamy coarse sand. Also noted is that in a large wash basin, the soil type is Carrizo. This soil is the same as Riverbend with the upper soil layer being very cobble coarse sand.

The existence of floodplains can impact the development potential of a parcel or site by increasing improvement costs and restrictions on where structures can be placed. The Consultant Team did not assess drainage conditions, but according to the VTN study, the three 400-acre parcels within the subject site selected as potential business parks are located within a Zone "X" area. This is an area outside of the 0.2 percent annual chance floodplain.

The Clark County Regional Flood Control District made a very general recommendation of developing a system of drainage channels that can handle 100-year peak flows. This system would consist of two segments of drainage channels. One channel would connect to the second one, which would then travel under the Needles Highway and disperse the water into the Colorado River (see Exhibit I-4). According to Flood Control District personnel, because the Southland site is currently undeveloped land, it is lower on the priority list than the recommended upgrades to the flood control facilities located in the town of Laughlin.

- **Visibility & Views** – The Southland site's visibility is a function of its off-site perspective, while views are considered on-site characteristics. The subject site can only be directly accessed via the Needles Highway. Currently, because of the lack of development, both the east and west sides of the subject site are visible from this highway. From within the subject site, overall views are of natural desert terrain. Panoramic views include the mountain ranges surrounding to the West, the Colorado River to the East and the Fort Mohave community and Indian Reservation to Southeast.

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- **Abutting & Nearby Land Uses** – As noted above, the subject site is abutted by the Colorado River and the Fort Mohave Indian Reservation on the East and South east, the California-Nevada border on the South, and undeveloped land that is owned and managed by the Bureau of Land Management to the North West and West.
- **Access Points** - Good access is integral to the successful marketing of a site, especially its commercial and industrial components. As mentioned, previously, the subject site is undeveloped with the Needles Highway providing the only direct access.

B. Site Analysis Conclusions

Our Site Analysis and fieldwork indicates that the Subject Property's features are moderately supportive of some type mixed-use master planned development with residential, retail, office and industrial/business park components (See Table I-1). Specifically, our Site Location Rating Matrix indicates that the Southland site has a rating of 15.5 out of total possible score of 24 (See Table I-2).

Soil composition and drainage, if properly dealt with, should not be obstacles for the Southland site's development potential. Also, the subject site will benefit from the nearby development activity in the Tri-State area. Specific advantages the subject site enjoys include high visibility and relatively good access to major linkages via US 95, US 163 and I-40.

Because of Southland site's semi-rural location, this study also considered the Laughlin area's location in the context of the Southern Nevada region and economy. The Area Location Analysis that follows focuses on the subject site's development potential in the context of the region, reflecting growth patterns and linkages that connect it to the regional economic and development patterns as well as community

and support facilities.

II. AREA LOCATION ANALYSIS

The locational attributes of real estate indicate where demand is most likely to occur. Portions of the Laughlin area with locational features most favorable to development will tend to capture demand at a faster rate than other areas. The Consultant Team's Area Location Analysis considered various features of the Laughlin area, including the quality of its linkages, land use associations, character of growth as well as its direction and rate of growth. Accordingly, the Consultant Team ranked the subject site's location for the various land uses, using factors, such as proximity to employment and housing, direction of growth and transportation accessibility.

Specifically, our Area Location Rating Matrix (Table I-3) indicates that the Tri-State area, specifically Laughlin, faces significant challenges today. Some of these challenges are short-term but others are medium- and long-term. Specifically, our Area Location Matrix ranks the Laughlin area at a 13 out 36. While current development trends suggest the subject site is in the path of growth, future growth is expected to proceed at a very moderate pace unless huge investments in infrastructure are made, and the Southern Nevada economy returns to its pre-Great Recession growth trajectory. Both of these factors are uncertain at this time.

Some of our more salient findings are summarized below, and again, various supporting exhibits and tables are included at the end of this section.

A. Southland Site Location Description

As noted, the Southland site is located in Laughlin, Nevada, on the Colorado River across from Bullhead City Arizona and near the California-Nevada border. The

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subject site was acquired by Clark County from the Colorado River Commission in 2004.

The Southland site is located in the emerging and relatively largely undeveloped Tri-State area (see Exhibit I-1) that has generally witnessed moderate growth during the last 20 years. The area, like the rest of Southern Nevada, saw its growth slow substantially because of the Great Recession. However, as the national, regional and state economies continue to improve, it is expected that the Tri-State area will capture a share of this growth. Tables I-2, Site Rating Matrix, and I-3, Area Location Rating Matrix, rank some of the more significant attributes of the subject site and the community's location in context of Southern Nevada and the Tri-State area.

B. Existing Road Network

As noted, the Needles Highway generally transects the Southland site in Northeast-Southwest direction from Needles, California to US 163 in Laughlin. Heading north, Laughlin's casino-hotel cluster is located approximately 10 miles away. From Laughlin, there is access to the US Highway 163 (Laughlin Highway) which leads directly into Bullhead City to the east and the US 95 to the west. The US 95 leads north to Las Vegas and south to the I-40 in California. From the subject site, heading south, Needles Highway provides access to the Fort Mohave Indian Reservation and Needles, California. As noted above, Needles has direct access to the I-40. This interstate freeway serves Southern California terminating at Barstow and extends east through the Southwest US all the way to Wilmington North Carolina (see Exhibit: I-5). For traffic counts of the Nevada portion of the Needles Highway and other main roads in the Laughlin area see table I-4.

C. Direction of Growth & Growth Rate

In general, the development of the Laughlin-Bullhead area has proceeded from the center, outward toward the mountains and along the major transportation linkages described above. The Southland Site is located in a relatively new path of development towards the southwest from Laughlin toward California. Assuming the necessary infrastructure improvements are made and the area's economic development assets are effectively marketed, area around the subject site will see increased residential and commercial development within the next several years.

The Consultant Team's economic and demographic assessment can be found in Chapter II, Market Area Definition Analysis.

D. Zoning & Intensity of Development

The Southland site is currently separated into several zoned areas. The land along both sides of the Needles Highway is zoned for a Business and Design Research Park. The rest of the land west of the Needles Highway is zoned as Open Lands. The land east of the Needles Highway, just north of the Fort Mojave Indian Reservation is zoned for Major Development Projects. Currently, only a few small areas of the subject site are zoned for Public Facilities (see Exhibit I-3).

The current zoning suggests that new development in the vicinity of the site will most likely be a combination of residential and commercial uses providing support for the subject site' development. Given the diverse zoning districts that allow for various uses in the area, there appears to be planning flexibility at the Southland Site.

E. Area Location Analysis Conclusions

The purpose of the Consultant Team's Area Location Analysis was to relate the Southland Site's features to a possible mix of land uses. In our location rating procedure, specific criteria were applied to evaluate the relative potential of these land uses at the subject site:

1. Industrial/Business Park
2. Residential (Detached and Attached)
3. Commercial (Retail and Office)

The Subject Property's general location indicates that a well-designed, master planned development has the potential to attract residents, commercial development and employment centers, in time. The operative phrase is "in time". The development of such a large parcel in the context of the Southern Nevada economy and, especially in a semi-rural location like the Laughlin-Bullhead area is not something that will occur in the short-term. It is not likely to occur in the mid-term, either. It is a long-term project that will require what we call the "Three T's" – talent, time and treasure. We will add even more critical factor – political will. Additionally, the lack of a major population center in the Tri-State Area provides a challenge and an opportunity for the Southland site's development. The challenge is the subject site not located close to a major market and the opportunity is that Clark County can strategically position itself ahead to of growth curve.

In the following two sections of this Highest and Best Use Study, the Consultant Team conducted several high-level analyses regarding the Southland Site's development potential to assist Clark County in assessing prospective market orientation and positioning opportunities and challenges.

III. STUDY AREA SWOT ANALYSIS

This Strengths, Weaknesses, Opportunities and Threats (“SWOT”) analysis provides an evaluation relative to the Southland site in the context of the Laughlin and Tri-State area’s economies. The Strengths and Weaknesses described below are internal factors that summarily discuss the advantages and disadvantages of the site in the context of the local and regional market. Opportunities and Threats are external factors, meaning that they are outside the immediate Laughlin area in Clark County. Identifying these factors helps determine (among other factors) what the highest and best use of the subject site will potentially be.

Town of Laughlin and Southland Site Development

A. Strengths

Site Size

As noted previously, the Southland site consists of nearly 9,000 acres. Although the Consultant Team does not know the exact amount of the site that is developable, there appears to a sizeable amount of acreage that is available for commercial and residential development. A full engineering analysis will have to be completed to determine how much of the subject is developable. And this will depend on the County’s desired land use mix in the context of the market. The Southland site can be subdivided into parcels zoned for different uses that can satisfy both the immediate and long-term demands and needs of Laughlin.

Even if only a relatively small portion of the site was opened-up for near-term residential and commercial development, there is still a significant amount that is currently available for industrial or business park¹ development. For the example, the engineering, planning and surveying firm VTN completed a study in August,

¹ The Urban Land Institute defines a Business Park as a multi-building development planned to accommodate a range of uses, from light industrial to office space, in an integrated park-like setting with supporting uses for the people who work there.

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2009 that identified three 400-acre parcels fronting the Needles Highway that can potentially be used for business park development.

Proximity to Las Vegas, Phoenix and Southern California

As noted, above, Laughlin is centrally located, part of what locally called the Tri-State area, at the intersection of the borders of Nevada, Arizona and California (see Exhibit I-1). With proximity to the US 93 and US 95 highways, and the I-40 freeway, the town is connected to the Las Vegas, Phoenix and Southern California. Any major development on the subject site can draw from these populations for a customer-base.

The traffic from the West generally comes from two sources: the US 95 to US Highway 163 (Laughlin Highway), then through the town of Laughlin via the Needles Highway, which directly intersects the subject site in a Northeast to Southwest direction. The other traffic access to the Southland site is from the I-40 (East-West) in California to the Needles Highway.

Low-Tax Climate

The Tax Foundation notes that Nevada is one of the best states in which to do business, ranking the state #3 in its 2014 ranking of State Business Tax Climates. Of particular note is that the state imposes no personal nor corporate income taxes—a significant advantage over neighboring Arizona (Ranked #22) and California (Ranked #48).

It should be noted that a current margins tax initiative being proposed by the Nevada State Education Association will potentially dramatically change the tax climate in the state. This measure will be on the ballot for voters to decide this upcoming November 4, 2014 election. If passed, businesses in Nevada could

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potentially see a drastic increase in business taxes that will negatively impact the state's economy and economic diversification potential. The Initiative would levy a two-percent tax on businesses with annual gross revenues of over \$1 million after deductions for payroll, cost of goods or a standard 30 percent. It would also be the first business tax in the state that would impact all businesses.

Established Tourism Industry

Laughlin has over 10,000 hotel rooms, a local tourism committee and has advertising and marketing provided by the Nevada Commission on Tourism and Las Vegas Convention and Visitors Authority. The Town also hosts large-scale events such as the Laughlin River Run, Talent Quest National Finals and the Bullhead City River Regatta, which is the world's largest tube float. This industry and experienced marketing agencies can be used as a base for attracting new businesses and residents to the area.

Natural Beauty

Laughlin has very little exposure to natural disasters, making it a safe destination for investments that are sensitive to these types of events. In addition, Laughlin attracts outdoor enthusiasts to the Colorado River, Lake Mead, Hoover Dam, North Reach Trail, Big Bend State Rec Area and other natural attractions.

Demand for Residential and Retail Land

The limited supply of developable land in Laughlin has resulted in increased real estate prices and many Laughlin residents live in Bullhead City and do their shopping there. Although there may be a significant portion of the Southland site that is potentially available to service housing demands in Laughlin, only a small portion of the subject site needs to be developed initially for residential and

commercial uses to satisfy current demand. Clearly, developing the subject site will have a positive impact on the Town's tax-base and employment-base.

B. Weaknesses

Limited Supply of Labor

The Tri-State area includes the nearby communities of Bullhead City, Needles, Fort Mohave and the Mohave Valley, and according to the 2010 US Census, has about 70,000 persons (72,100 in 2012). Additionally, Clark (1,951,269), Mohave (200,186) and San Bernardino (2,035,210) Counties, where these communities are located, had a combined population of nearly 4.2 million persons in 2010. That said, a significant investment in time and resources to train a workforce for a large-scale economic activity in a semi-rural area like Tri-State, particularly in manufacturing and high-end logistics, which require a significant amount of training.

Limited Higher Education in Laughlin

There is currently no college campus in Laughlin. There is, however, Mohave Community College-Bullhead City Campus, Northern Arizona University-Bullhead City Campus and Palo Verde Community College-Needles Campus in the Tri-State area. These campuses are limited to the programs offered however. When the ENN Solar project was being discussed, plans were made to open a College of Southern Nevada ("CSN") – Laughlin campus to facilitate workforce training. Not only would a CSN – Laughlin campus be necessary to train a workforce in any potential industry, the lack of a college could negatively viewed by potential businesses considering the Southland site.

Limited Access Crossing Colorado River

There is currently only one bridge connecting Laughlin and Bullhead City over the Colorado River, located near the Laughlin Strip. However, discussions to build a second bridge began in 1994. Plans are moving forward to build a new four-lane bridge. Due to funding concerns, the bridge will initially be two-lanes, with an additional expansion to occur at a future date. While some plans project construction to begin in 2015, there is no definitive time table as to when construction for this bridge will begin.

Existing Transportation Needs Improvement

As noted above, the Needles Highway runs directly through the Southland site. However, the portion of this highway that is located in California is in drastic need of major renovations and repair. Additionally, although the Southland site is in close proximity, it does not have direct access to the major freeways in the area, the I-40, US-95 and US-93. And rail access to the site is non-existent. Such access would require the construction of a 19-mile spur to connect the subject site to the BSNF Railroad mainline in Needles. The cost of such a line would be very expensive (by some accounts, at least \$2 million per mile). It is highly unlikely that BSNF would invest in the spur unless it could be assured of a significant amount of demand by users/customers in the Southland site.

Lack of Recent Renovations and Expansions to Laughlin Casino-Hotels

When determining what communities are attractive to develop, developers look for a variety of factors. Some of which include:

- Current travel time to executive housing
 - Expected travel time to executive housing in next 10 years
 - Current travel time to a major airport
-

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- Expected travel time to a major airport in next 10 years
- Support facilities (stores, services)
- Visibility/prestige
- Recent commercial construction
- Public expenditures on infrastructure in last five years
- Amount of development activity

These are the quality of amenities, labor force, and housing stock. The quality of the labor force is discussed above under the topic of higher education. While the subject site could satisfy the immediate housing demand in Laughlin by increasing and improving the current housing stock, the lack of recent renovations and expansions to the Laughlin hotels can give the perception that the amenities in the area are dated and no longer satisfy the current demands of potential residents and certain visitors.

Potential Limits to Utilities, such as Water, Power, etc.

Currently, Laughlin is only using about 50 percent of its water capacity. However, certain types of industrial plants require heavy water use, which will prove problematic in attracting these users. Furthermore, other utilities, such as power, gas, telephone, internet and cable may not be adequately available in the area without significant financial investment that may prove to be cost prohibitive. The utility availability issue should be the subject of a detailed engineering analysis.

C. Opportunities

Light Manufacturing and/or Logistics

A recent study prepared by RCG Economics for the Governor's Office of Economic Development (<http://www.rcg1.com/publications-presentations/nevada-inland-port-study/>) found that there is potential in Nevada to develop light manufacturing and e-commerce/fulfillment centers. These industries are best suited for the Southern Nevada's traffic flows, labor and real estate costs, tax climate and

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proximity to the McCarran International Airport. The Southland site, if properly marketed and positioned, presents a real opportunity to attract businesses within these industries.

Nevada among Best Place in World for Solar Energy

Southern Nevada is currently home to several major solar power plants. These include Nevada Solar One, Copper Mountain Solar Facility, and Searchlight Solar. With the Crescent Dunes solar plant, located outside Tonopah, Nevada, projected to open in 2014, Nevada will produce nearly 400 megawatts of power from solar energy. As Nevada establishes itself as a leader of solar energy, it is expected that it will continue attract more solar energy business to the state to take advantage of the natural resources and experienced workforce.

Growth in the Renewable Energy Industry

In addition to solar power, other renewable energy sources, such as geothermal, biomass, and wind energy are gaining popularity. As these industries continue to grow, businesses will need to find suitable land for building the necessary plants and industrial parks; and the Southland site is positioned to compete for some these uses.

Needles Redevelopment Agency Has Been Disbanded

During the Great Recession, California terminated all local Redevelopment Agencies, including the one in Needles. As California gets its financial condition in order, it will eventually re-establish this agency. However, until that time, Laughlin is in a unique position to market itself with limited competition from Needles.

Increased Regulation in California is a Turn-Off for Business

The California Environmental Quality Act ("CEQA"), along with other major business and labor regulations, high taxes and heavy volume of business lawsuits are taking its toll on California's business environment. As many businesses in California continue to have a negative outlook on the overall business climate, the possibility of relocating to the Southland site becomes increasingly attractive.

D. Threats

Competing Economic Development in Nearby Communities

Currently, the Bullhead Regional Economic Development Agency actively markets similar economic growth projects in Bullhead City. Although Needles no longer has its Redevelopment Agency, if California ever gets its financial house in order, it will eventually re-establish this agency and again market to potential businesses to locate in Needles instead of Laughlin. Also, the Fort Mojave Indian Tribe has a large amount of developable land.

Available Industrial Land in California is More Accessible

Even with the poor business climate in California, the state has a significant amount of industrial square footage and land to accommodate the growth of its population and economy, which makes it an ideal place for industrial development. Southern California's major industrial areas, such as the Inland Empire, are well-served by rail and highway, and are near one of the country's premier population centers. At over 22 million people (2010), Southern California has approximately 60 percent of California's population. The fact remains that some industries may find that these locational benefits to be greater than the additional burdens of higher taxes and regulations.

Other Communities are closer to Major Transportation

The City of Needles has existing BNSF rail lines and an Amtrak passenger station, and it directly connects with the Interstate 40 and U.S. 95. The Mojave Indian Reservation is closer to rail lines and the I-40 as well. Certain developers may find these areas more attractive if transportation issues are a concern.

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TABLE I-1: SUMMARY OF SUBJECT PROPERTY ANALYSIS OF CURRENT CONDITIONS

	Residential	Industrial/Business Park	Commercial (Office/Retail)
Slopes	Positive	Positive	Positive
Soils	Unknown	Unknown	Unknown
Views	Positive	Positive	Positive
Access Points	Positive	Positive	Positive
Abutting land /adjacent land uses	Positive	Positive	Positive
Floodplain	Partially Negative	Negative	Negative
Legal/ Regulatory	Positive	Positive	Positive
Noise Contours	Unknown	Unknown	Unknown
Utilities	Positive	Positive	Positive

Those factors identified as ‘negative’ are based on currently existing conditions, and do not limit the development potential of the site. The Consultant Team assumes that these issues will be addressed prior to development of the Project.

Source: RCG Economics.

I. Site/Productivity Analysis

TABLE I-2: SOUTHLAND SITE RATING MATRIX

Use	1 = Poor	2 = Average	3 = Good	4 = Excellent	Relative Score (Max. = 24)
Residential					
Proximity to employment				√	
Proximity to cultural activities (recreation, entertainment, etc.)				√	
Proximity to views/amenities				√	
Proximity to retail services		√			
Direction of growth			√		
Public planning & zoning			√		
Total Score					20
Business Park/Industrial					
Proximity to housing market & density of area housing			√		
Proximity to major transportation linkages		√			
Traffic volume by Subject Property		√			
Proximity to other shopping facilities			√		
Direction of community retail growth		√			
Public planning & zoning			√		
Total Score					15
Retail					
Proximity to housing market & density of area housing			√		
Proximity to major transportation linkages		√			
Traffic volume by Subject Property		√			
Proximity to other shopping facilities		√			
Direction of community retail growth		√			
Public planning & zoning				√	
Total Score					15
Office					
Proximity to housing market			√		
Proximity to major transportation linkages		√			
Proximity to retail development		√			
Proximity to other office development	√				
Direction of office growth	√				
Public planning & zoning			√		
Total Score					12

Source: RCG Economics.

I. Site/Productivity Analysis

TABLE I-3: AREA LOCATION RATING MATRIX

Locational Factors	Laughlin
Current travel time to executive housing	1
Expected travel time to executive housing in next 10 years	2
Current travel time to McCarran Int'l Airport	1
Expected travel time to McCarran Int'l Airport in next 10 years	1
Support facilities (stores, services)	2
Visibility/prestige	2
Recent commercial construction	1
Public expenditures on infrastructure in last five years	2
Amount of development activity	1
Total (Max. score = 36)	13

Note: In this table, the submarket was ranked with a score of 1 to 4, with 4 being the most desirable.

Source: RCG Economics.

TABLE I-4: LAUGHLIN TRAFFIC COUNTS: 2003 – 2012

Station	Description	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2003-2012
1429	Needles Hw, .1 mi S of Aha Macav Pk	2,900	2,950	2,450	2,900	3,600	2,400	2,200	1,700	2,000	1,500	-10.4%
687	Needles Hw, .5 mi S of SR-163 (Laughlin Hw)	1,900	1,900	1,650	1,750	1,700	1,500	1,400	1,700	1,800	1,500	-3.9%
688	Needles Hw, .1 mi S of Bruce Woodbury Dr	11,200	10,800	11,000	11,200	11,000	9,900	9,600	10,000	10,000	10,000	-1.9%
1074	Needles Hw, .2 mi N of Casino Dr	4,880	5,650	4,850	4,950	4,700	4,200	4,100	4,000	4,900	4,200	-2.5%
1075	Needles Hw, .3 mi S of Casino Dr	5,850	7,300	5,850	6,100	5,300	5,300	5,000	4,900	5,600	4,900	-2.9%

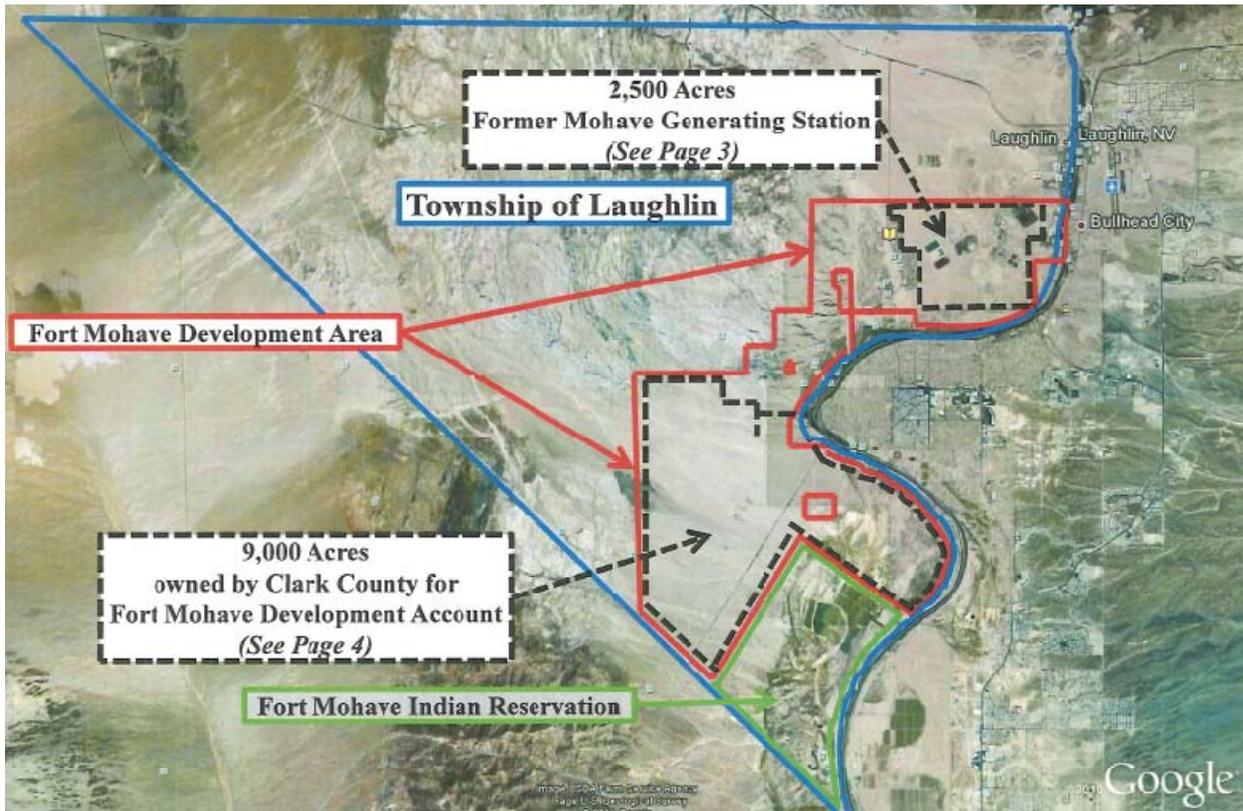
Source: Regional Transportation Commission of Southern Nevada, 2012 Clark County Traffic Count Report.

EXHIBIT I-1: THE TRI-STATE AREA



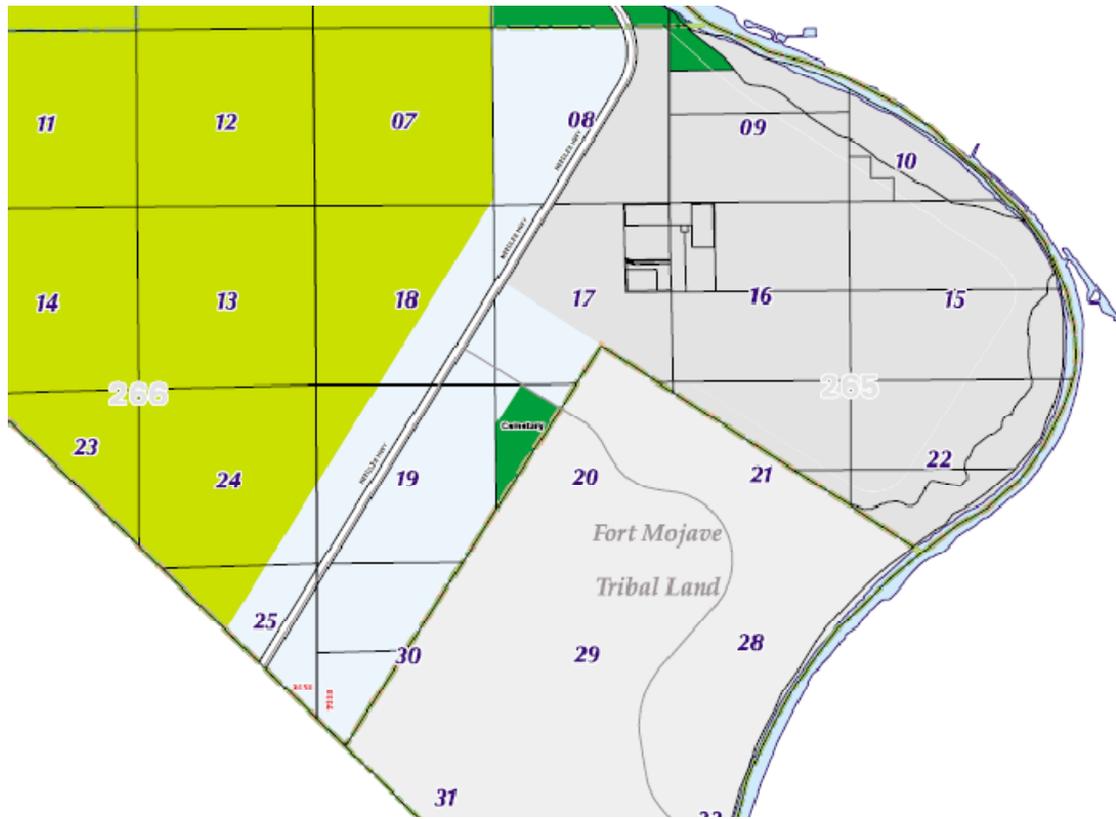
Source: Google Maps.

EXHIBIT I-2: SOUTHLAND SITE ARIAL MAP



Source: Google Maps.

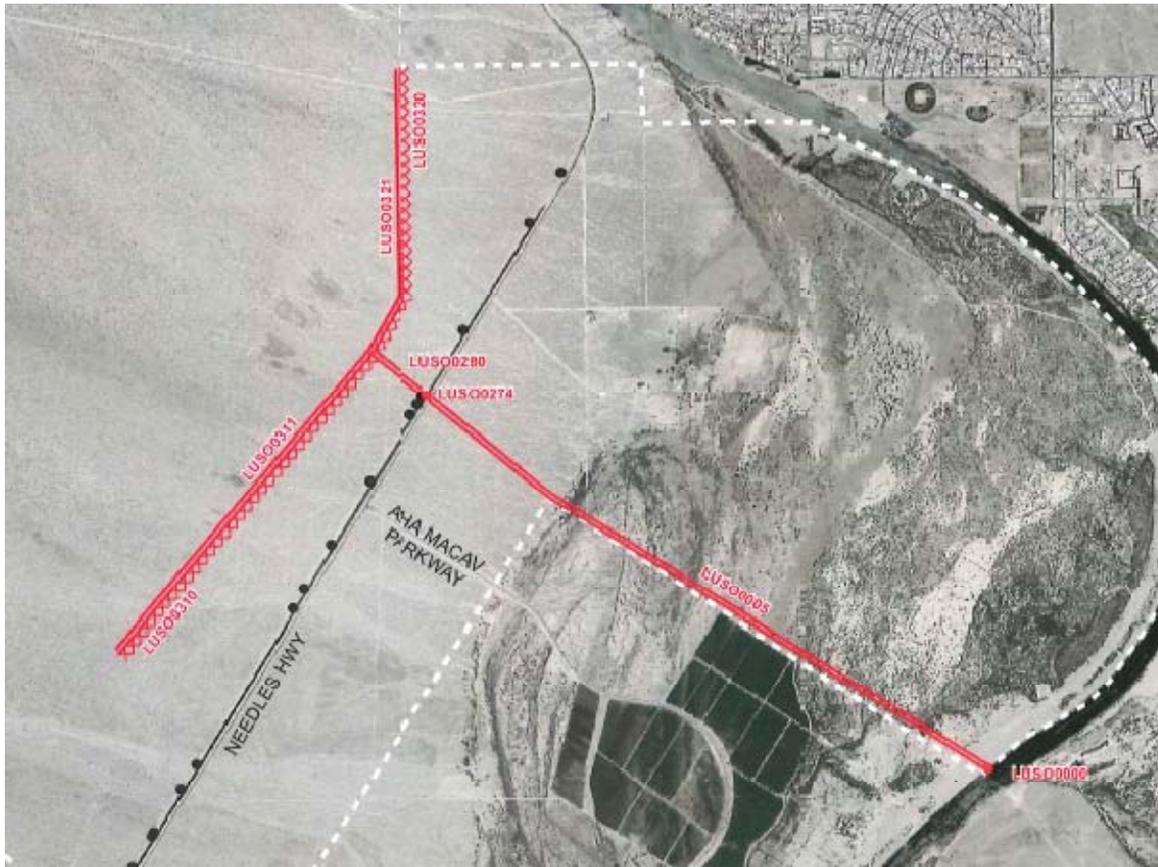
EXHIBIT I-3: SOUTHLAND SITE ZONED USE



- | | |
|---|--|
|  Open Lands |  Residential High Rise Center
Greater than 32 du/1ac |
|  Residential Rural
Up to 0.5 du/1ac |  Office Professional |
|  Residential Agricultural
Up to 1 du/1ac |  Commercial Neighborhood |
|  Rural Neighborhood
Up to 2 du/1ac |  Commercial General |
|  Rural Neighborhood Preservation
Up to 2 du/1ac |  Commercial Tourist |
|  Residential Low
Up to 3.5 du/1ac |  Business and Design
Research Park |
|  Residential Suburban
Up to 8 du/1ac |  Industrial |
|  Residential Medium
From 3 du/1ac to 14 du/1ac |  Heavy Industrial |
|  Residential High
From 8 du/1ac to 18 du/1ac |  Public Facilities |
|  Residential Urban Center
From 18 du/1ac to 32 du/1ac |  Major Development Projects |
|  MDP Schools |  Community Districts |
|  Disposal Boundaries |  Incorporated Cities
Tribal Lands |
|  LAUGHLIN Planning Area | |

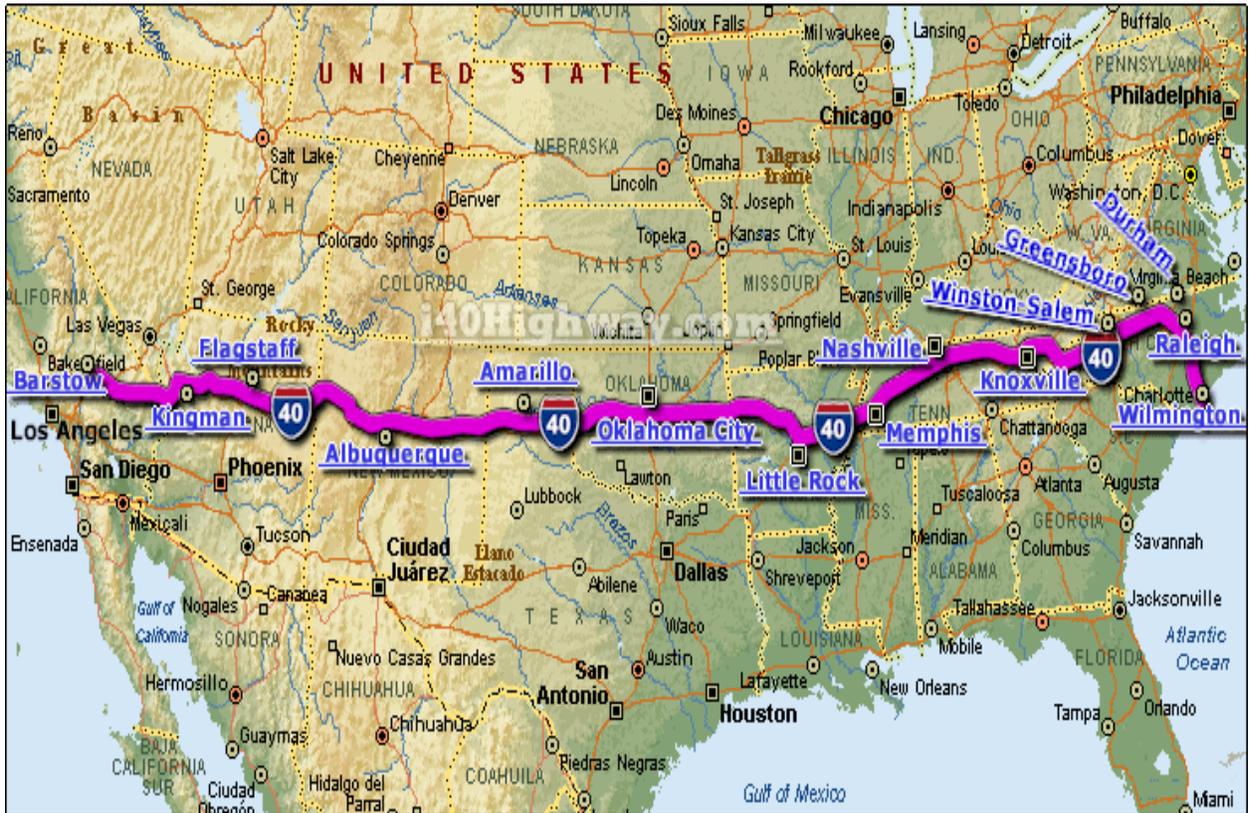
Source: Clark County Comprehensive Planning.

EXHIBIT I-4: SOUTHLAND SITE RECOMMENDED DRAINAGE CHANNEL IMPROVEMENT



Source: Clark County Regional Flood Control District.

EXHIBIT I-5: INTERSTATE 40



Source: <http://www.i40highway.com>.

MARKET AREA DEFINITION & SOCIOECONOMIC PROFILES

I. INTRODUCTION & MARKET AREA DEFINITIONS

A. Introduction

The vitality of local and regional economies has a significant impact on the performance of its real estate markets and individual developments. After an assessment of the Southland's site and location attributes (Productivity Analysis) in the previous section, this section examines the underlying socio-economic forces of the region's market area. In this case, the region's market area is considered to be the geographical area within a two-hour drive of the subject site.

Population size and characteristics, income levels, housing prices and availability, workforce quality and education, business activity, ethnic composition, economic character and a number of other factors relevant to changing land use patterns and trends vary somewhat throughout a region. These forces, in turn, reflect the quantity and quality of current commercial and residential real estate demand, and provide a basis from which future estimates of demand can be made.

B. Market Area Definitions

The delineation of the Study's region was based on various factors to determine the scope of each market area. These factors were based on its physical attributes (e.g., rivers, mountains, major thoroughfares, land use patterns, road network, etc.), as well as its population and employment center concentrations, commuting patterns, trade relationships, transportation linkages, feedback from outreach efforts and data availability. As a result, four relevant market areas were delineated. Table II-1 below lists the communities that define the Southland site's Primary Market Area ("PMA") and Secondary Market Area ("SMA").

II. Market Area Definition Analysis

TABLE II-1: MARKET AREAS DEFINITION

Primary Market Area	Secondary Market Area		
Tri-State Area CA-AZ-NV (7 sub-regions)	Las Vegas Area NV (11 sub-regions)	Kingman Area AZ (3 sub-regions)	Lake Havasu Area AZ (2 sub-regions)
Bullhead City (City)	Boulder City (City)	Golden Valley	Desert Hills
Fort Mohave	Enterprise	Kingman (City)	Lake Havasu City (City)
Golden Shores	Henderson (City)	New Kingman-Butler	
Laughlin	Las Vegas (City)		
Mohave Valley	North Las Vegas (City)		
Needles (City)	Paradise		
Willow Valley	Spring Valley		
	Summerlin South		
	Sunrise Manor		
	Whitney		
	Winchester		

1. Primary Market Area

The PMA is the area where the subject site is specifically located. As discussed in the previous section, Southland’s site is in the township of Laughlin, which is geographically connected to the nexus of the California, Arizona and Nevada state borders. In this case, **the PMA is the Tri-State Area**, comprised of six other sub-regions in addition to Laughlin, NV, including Bullhead City, AZ; Fort Mohave, AZ; Golden Shores, AZ; Mohave Valley, AZ; Needles, CA and Willow Valley.

The focus of this section is a demographic and economic overview of the Tri-State Area, but is discussed in context of secondary market areas.

II. Market Area Definition Analysis

2. Secondary Market Areas

The SMAs are areas within the region from where the subject site can draw a share of its labor force and residents from, as well as potentially its customer-base.

Approximately 80-100 miles north from the Southland site along US 95 is the **Las Vegas Area**, comprised of eleven urbanized sub-areas of Southern Nevada. This is the by far the most densely populated area in the region. However, it is also the furthest in proximity from the Southland site, requiring at least 1.5 hours of travel time.

The **Kingman Area** is within approximately 30-40 miles (or 30-minute drive) east of the subject site along AZ Route 68 to the unincorporated community of Golden Valley, AZ. AZ-68 runs through Golden Valley, which is surrounded by mountains, and terminates at the eastern end of Golden Valley to US 93. Further along US 93 leads to the city of Kingman, AZ and the unincorporated community of New Kingman-Butler.

To the south of the subject site is the **Lake Havasu Area**, comprised of Lake Havasu City and Desert Hills. Surface access is approximately 65 miles (or just over 1-hour drive time) and is provided by Needles Highway, which meets Interstate 40 and connects to US 95.

II. SOCIO ECONOMIC DRIVERS: DEMOGRAPHIC & HOUSING PROFILES

The drivers of current and future projected socioeconomic changes in the Tri-State Area directly affecting the Southland site include the size and characteristics of its population, households, level of business activity, housing units and housing affordability. The demographic and housing profiles presented in the exhibits and discussed below are based on the latest data available from the U.S. Census American Community Survey.

A. Demographic Profile

The Tri-State Area's total population in 2012 totaled 72,100 persons, accounting for 3.5 percent of the region's total. Its population was largely concentrated in the Bullhead City and Fort Mohave sub-areas. At 130 persons per square mile, population density for the Tri-State was similar to the semi-rural Kingman and Lake Havasu Areas (see Table II-2 below).

II. Market Area Definition Analysis

TABLE II-2: SUMMARY OF DEMOGRAPHIC PROFILE BY STUDY AREA: 2012

	Tri-State Area		Las Vegas Area		Kingman Area		Lake Havasu Area	
	#	%	#	%	#	%	#	%
Population								
Total Population	72,100		1,869,180		49,240		55,180	
Land Area (Sq. Mi.)	555		734		408		304	
Density (Persons/Sq. Mi.)	130		2,547		121		181	
Less than 18 years	13,730	19.0%	468,490	25.1%	10,790	21.9%	10,880	19.7%
18 years and over	58,370	81.0%	1,400,690	74.9%	38,450	78.1%	44,300	80.3%
65 years and over	18,250	25.3%	212,330	11.4%	10,420	21.2%	14,740	26.7%
Median age	49.3		35.6		46.0		50.2	
Male	35,730	49.6%	938,000	50.2%	24,440	49.6%	26,610	48.2%
Female	36,370	50.4%	931,180	49.8%	24,800	50.4%	28,570	51.8%
White	54,010	74.9%	882,870	47.2%	40,210	81.7%	47,180	85.5%
Black/African American	1,050	1.5%	192,440	10.3%	200	0.4%	350	0.6%
American Indian/Alaskan	1,010	1.4%	7,840	0.4%	300	0.6%	220	0.4%
Asian	940	1.3%	160,660	8.6%	390	0.8%	490	0.9%
Hawaiian/Pacific Islander	60	0.1%	12,400	0.7%	160	0.3%	20	0.0%
Other	60	0.1%	3,670	0.2%	20	0.0%	20	0.0%
Two or More Races	1,290	1.8%	56,280	3.0%	1,960	4.0%	770	1.4%
Hispanic	13,670	19.0%	553,020	29.6%	6,000	12.2%	6,140	11.1%
Households								
Total Households	30,910		676,960		19,580		23,880	
Family households	19,400	62.7%	438,960	64.8%	12,730	65.0%	15,960	66.9%
Average household size	2.3		2.7		2.5		2.3	
Average family size	2.8		3.4		3.0		2.8	

Note: Totals may not sum exactly due to rounding.

Source: U.S. Census - 2012 American Community Survey (5-year estimates).

The Tri-State Area has a smaller proportion of youth—those aged less than 18 years—compared to other areas in the region. Youths comprised 19 percent of the population in 2012. The share in the other areas ranged between 19.7 percent in Lake Havasu Area and 25.1 percent in Las Vegas Area. Conversely, a larger part of the Tri-State's population was adults aged 65 years plus at 25.3 percent. Age distribution within a community is important to note as the needs of a younger population differs from the needs of an older population. The Tri-State Area's median age was 49.3 years, similar to the other semi-rural areas but notably higher

II. Market Area Definition Analysis

than its northern neighbor in the Las Vegas Area, where the median age is 35.6 years.

The Tri-State Area's non-White racial groups comprised 74.9 percent of the population, showing a less ethnically diverse population compared to the Las Vegas Area. A community with different ethnicity backgrounds may have specific needs and wants of specialty goods and services from local businesses. Tri-State Area is more similar to the Kingman and Lake Havasu Areas, except for having a higher share of American Indian/Alaskan (1.4 percent) and Hispanic population (19 percent).

The Tri-State Area's 30,910 households in 2012 is slightly higher in proportion than its population at 4.1 percent of the region's total. This is reflected in a relatively lower average persons per household size, which ranged from 2.3 in the Tri-State and Lake Havasu Areas and 2.7 in the Las Vegas Area. Of the total households in the Tri-State Area, 62.7 percent were family households in 2012. This is the lowest share of family units among the market areas in the region. Trends in family households may be important to assess to determine future housing type needs for an area (e.g., single-family and multi-family).

B. Housing Profile

1. Housing Units

Approximately 71 percent of the Tri-State Area's 43,780 housing units were occupied, similar to the Lake Havasu Area (68.5 percent) but notably less than the Las Vegas and Kingman Areas, at 84.4 percent and 83.2 percent respectively. Approximately 63 percent of the Tri-State Area's occupied units were owner-occupied and the remaining 37 percent were households renting their units. See Table II-3 below.

By housing type, the Tri-State Area had a lower share of single-family units (i.e., 1-unit, detached) at 49.5 percent in the region. Half of the Tri-State Area's total housing units were built after 1990. Prior to the 2008-09 recession, the housing boom was largely in the Bullhead City and Fort Mohave sub-regions, while Laughlin remained relatively flat. Since 2010, only 141 housing units were built in the Tri-State Area, of which 115 were built in Laughlin. A few subdivisions appear to be active in Laughlin, including the Bilbray Ranch master-planned community, Cottage Court and new sales programs exist at the South Bay Racquet Club condos.

II. Market Area Definition Analysis

TABLE II-3: SUMMARY OF HOUSING PROFILE BY STUDY AREA: 2012

	Tri-State Area		Las Vegas Area		Kingman Area		Lake Havasu Area	
	#	%	#	%	#	%	#	%
Housing Units								
Total Housing units	43,780		801,660		23,520		34,880	
Occupied housing units	30,910	70.6%	676,960	84.4%	19,580	83.2%	23,880	68.5%
Owner-occupied	19,460		372,880		13,580		16,790	
Renter-occupied	11,460		304,080		5,990		7,090	
Vacant housing units	12,870	29.4%	124,700	15.6%	3,940	16.8%	11,000	31.5%
Housing Vacancy	29.4%		15.6%		16.8%		31.5%	
Housing Type (Total Housing Units)								
1-unit, detached	21,670	49.5%	466,900	58.2%	13,310	56.6%	26,570	76.2%
1-unit, attached	790	1.8%	38,730	4.8%	510	2.2%	1,210	3.5%
2 units	660	1.5%	8,370	1.0%	90	0.4%	1,270	3.6%
3 or 4 units	1,720	3.9%	54,050	6.7%	270	1.2%	1,430	4.1%
5 to 9 units	1,970	4.5%	81,880	10.2%	710	3.0%	770	2.2%
10 to 19 units	1,400	3.2%	57,380	7.2%	330	1.4%	480	1.4%
20 or more units	1,970	4.5%	69,470	8.7%	270	1.1%	940	2.7%
Mobile home	13,480	30.8%	24,230	3.0%	7,880	33.5%	2,150	6.2%
Boat, RV, van, etc.	130	0.3%	660	0.1%	150	0.6%	60	0.2%
Year Built (Total Housing Units)								
Built 2010 or later	140	0.3%	3,230	0.4%	70	0.3%	50	0.1%
Built 2000 to 2009	11,270	25.7%	268,300	33.5%	6,410	27.3%	8,940	25.6%
Built 1990 to 1999	10,460	23.9%	228,950	28.6%	5,460	23.2%	10,530	30.2%
Built 1980 to 1989	11,590	26.5%	125,420	15.6%	4,490	19.1%	7,940	22.7%
Built Prior to 1980	10,320	23.6%	175,760	21.9%	7,080	30.1%	7,440	21.3%

Note: Totals may not sum exactly due to rounding.

Source: U.S. Census - 2012 American Community Survey (5-year estimates).

2. Housing Affordability

The US Department of Housing and Urban Development considers housing to be “affordable” if no more than 30 percent of a household’s monthly income is needed for costs of rent/mortgage payments and utilities. Otherwise, households are considered “cost-burdened” in affording necessities such as food, clothing, transportation and medical care.

II. Market Area Definition Analysis

By housing tenure, renters in all areas within the region overall were the most cost burdened when compared to owner-occupied units with a mortgage and owner-occupied units without a mortgage. In the Tri-State Area, 50.3 percent of households in rented housing units were cost-burdened in 2012, followed by 46.3 percent of cost-burden households in housing units with a mortgage (see Table II-4 below). The median monthly cost for a mortgaged housing unit in the Tri-State Area was \$1,154 and median monthly gross rent for renters was \$805.

TABLE II-4: SUMMARY OF HOUSING AFFORDABILITY: 2012

For-Sale Housing								
Owner Costs as a % of Household Income*	Tri-State Area		Las Vegas Area		Kingman Area		Lake Havasu Area	
	#	%	#	%	#	%	#	%
Housing units w/ a mortgage	10,800		289,880		8,160		10,350	
Less than 30%	5,800	53.7%	155,730	53.7%	4,870	59.7%	5,230	50.5%
30% or more	5,000	46.3%	134,150	46.3%	3,290	40.3%	5,120	49.5%
Monthly Median cost	\$1,154		\$1,730		\$1,025		\$1,361	
Housing units w/out a mortgage	8,310		79,640		5,350		6,250	
Less than 30%	7,330	88.1%	68,210	85.7%	4,980	93.1%	5,450	87.2%
30% or more	990	11.9%	11,430	14.3%	370	6.9%	800	12.8%
Monthly Median cost	\$363		\$443		\$279		\$341	
Total housing units	19,110		369,530		13,500		16,600	
Less than 30%	13,130	68.7%	223,950	60.6%	9,850	72.9%	10,670	64.3%
30% or more	5,990	31.3%	145,580	39.4%	3,660	27.1%	5,930	35.7%
Rental Housing								
Gross Rent as a % of Household Income*	Tri-State Area		Las Vegas Area		Kingman Area		Lake Havasu Area	
	#	%	#	%	#	%	#	%
Occupied units paying rent	10,800		296,260		5,500		6,770	
Less than 30%	5,230	48.5%	139,160	47.0%	2,510	45.7%	3,180	47.0%
30% or more	5,440	50.3%	151,270	51.1%	2,880	52.4%	3,480	51.4%
Monthly Median cost	\$805		\$1,050		\$787		\$879	

Source: U.S. Census - 2012 American Community Survey (5-year estimates).

*Excludes housing units where owner costs/gross rent cannot be computed.

II. Market Area Definition Analysis

Median housing prices have fallen throughout the region during the 2008-2009 recession, positively impacting affordability of for-sale housing during the past six years. Housing affordability for the semi-rural areas in the region overall provide more opportunity than the urbanized Las Vegas Area.

II. Market Area Definition Analysis

III. ECONOMIC FORCES: LABOR MARKET & EMPLOYMENT BASE

Employment and commuting data for the Tri-State, Las Vegas, Kingman and Lake Havasu Areas were obtained from the latest data available from the U.S. Census Bureau's LEHD Employment Statistics.

The region's economy is discussed herein in terms of its employment characteristics and trends. This section presents data and analysis on the region's labor force and commuting patterns characteristics.

When using employment statistics, it is important to distinguish between labor force employment and establishment-based employment. Labor force employment, which will be covered next, is a count of persons employed and is estimated by place of residence. This differs from establishment-based employment (or employment base, which will be discussed later in the report), which is a count of jobs estimated by place of work.

There can be a sizeable difference between these two data sets. For example, since establishment-based employment is a count of jobs, multiple job holders are counted twice. Also, a job in Laughlin is counted in the Tri-State Area regardless of where the worker lives; thus, a region may have more jobs than there are employed persons, with workers commuting from outside the area.

II. Market Area Definition Analysis

A. Labor Force Profile

Over 22 percent of the Tri-State Area's labor force is 29 years or younger and 52 percent is between 30 to 54 years old. This share is lower than other areas in the region. Conversely, the Tri-State Area has a larger share of an older workforce, with 25.5 percent of its working residents aged 55 or older.

Despite having an older, more experienced workforce only 21.1 percent of the labor force earned more than \$3,333 per month. This is significantly less than the other areas. The share of Tri-State Area residents that earned \$1,250 or less per month was 26.8 percent, higher than both Las Vegas (16.8 percent) and Kingman (25.0 percent), but less than Lake Havasu (28.2 percent). In the Tri-State Area 52.1 percent earned between \$1,251 and \$3,333 per month and is more than the other areas within the region.

The relatively low amount of high wage earners may be attributed to the types of employment requiring higher levels of education. The Tri-State Area had 38.2 percent of the labor force with only high school education or less, higher than the rest of the region. In turn, only 61.2 percent of its labor force had at least some college education, less than nearby areas.

B. Commuting Profile

Of the 24,370 working residents living in the Tri-State Area, 57.5 percent were employed in the area, resulting in a low "in-area labor force efficiency" (the percent of its workers both living and employed in the area). Also, the area had an outflow of 10,360 workers (residents commuting outside the area) and an inflow of 6,600 workers (non-residents commuting to the area), resulting in a negative net job flow of 3,760 workers. The Kingman and Lake Havasu areas also had a negative net job

II. Market Area Definition Analysis

flow, while the Las Vegas area had a positive net job flow and the highest percentage of workers living and employed there. See Table II-5 below.

TABLE II-5: LABOR MARKET EMPLOYMENT AND INFLOW/OUTFLOW COMMUTING PROFILES: 2011

	Tri-State Area		Las Vegas Area		Kingman Area		Lake Havasu Area	
	#	%	#	%	#	%	#	%
Labor Force Market Total Jobs	24,370		705,600		14,810		17,460	
Age 29 or younger	5,480	22.5%	159,800	22.6%	3,440	23.2%	4,060	23.2%
Age 30 to 54	12,670	52.0%	408,060	57.8%	7,980	53.9%	9,220	52.8%
Age 55 or older	6,220	25.5%	137,750	19.5%	3,380	22.8%	4,180	23.9%
\$1,250/month or less	6,530	26.8%	118,740	16.8%	3,700	25.0%	4,920	28.2%
\$1,251 - \$3,333/month	12,690	52.1%	317,280	45.0%	6,790	45.9%	7,810	44.7%
More than \$3,333/month	5,150	21.1%	269,580	38.2%	4,310	29.1%	4,730	27.1%
Less than high school	3,720	15.3%	89,920	12.7%	1,540	10.4%	1,810	10.4%
HS or equivalent, no college	5,590	22.9%	129,300	18.3%	3,530	23.8%	4,060	23.2%
Some college/Assoc. degree	6,160	25.3%	174,620	24.7%	3,990	27.0%	4,690	26.9%
Bachelor's/Advanced degree	3,420	14.0%	151,960	21.5%	2,300	15.5%	2,840	16.3%
Educ. attainment n/a	5,480	22.5%	159,800	22.6%	3,440	23.2%	4,060	23.2%
Inflow/Outflow Commuting Profile	Tri-State Area		Las Vegas Area		Kingman Area		Lake Havasu Area	
Living in the Area	24,370		705,600		14,810		17,460	
Employed in the Area	20,610		726,680		13,370		12,620	
Net job inflow (+) or outflow (-)	-3,760		+21,080		-1,440		-4,840	
In-Area Labor Force Efficiency								
Living and employed in the Area	14,010		672,040		7,160		9,350	
% Living and employed in the Area	57.5%		95.2%		48.3%		53.6%	
Living in the Area, employed outside	10,360		33,560		7,650		8,110	
% Living in the Area, employed outside	42.5%		4.8%		51.7%		46.4%	
Outflow								
External jobs filled by residents	10,360		33,560		7,650		8,110	
Inflow								
Internal jobs filled by outside workers	6,600		54,640		6,210		3,270	
Internal flow								
Internal jobs filled by residents	14,010		672,040		7,160		9,350	

Source: U.S. Census Bureau - LEHD Employment Statistics.

C. Economic-Base Profile

Whereas the previous discussion explored the region's labor force, this section examines the region's employment-base. An assessment of the industries that makes up the region's employment-base can reveal economic competitiveness and market positions within the regions.

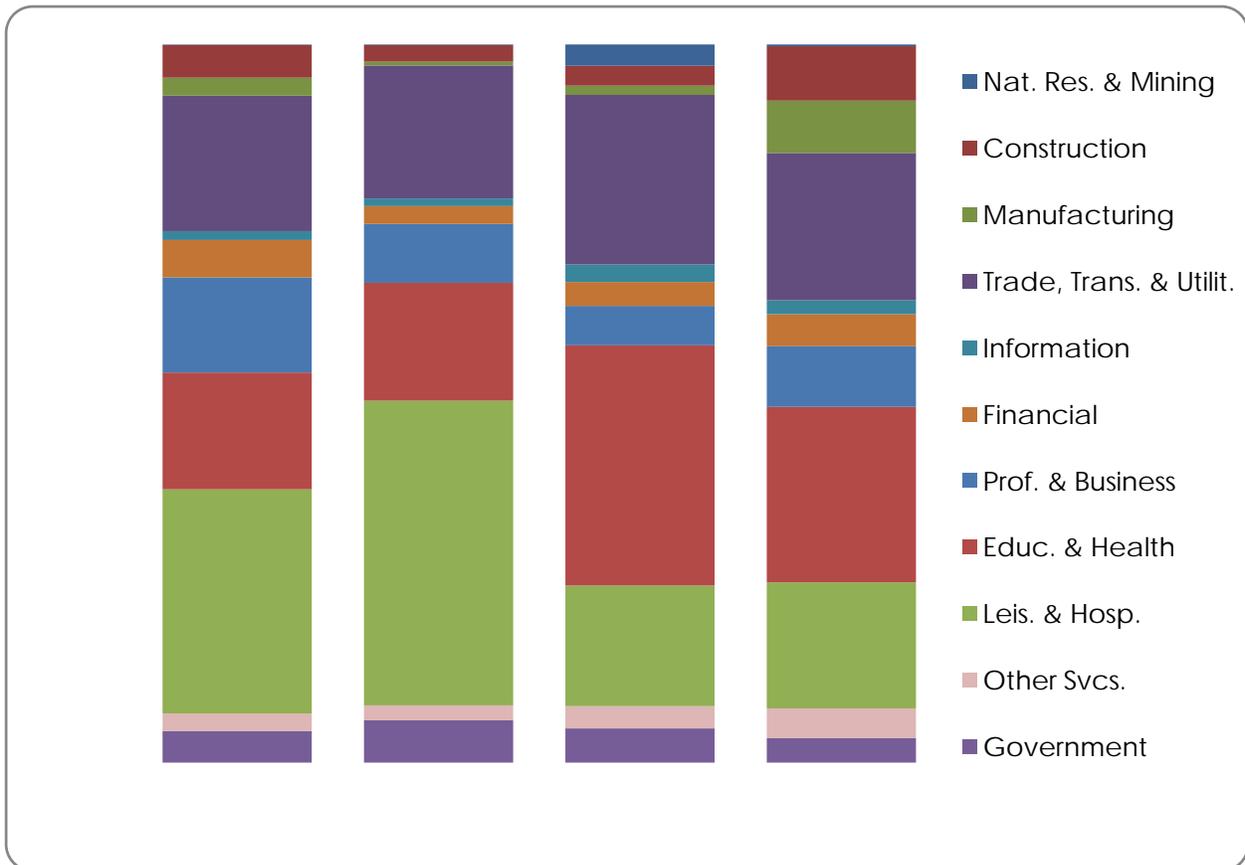
An economic-base analysis classifies an industry within a local economy according to its trade activities. These trade activities can be divided into two categories: exports and imports. The distinguishing feature is whether an industry's goods and services are consumed locally (imports) or consumed outside the region (exports). Export activities of a regional economy drive out-of-region sources of revenue, rather than circulating revenue that is already in the region.

II. Market Area Definition Analysis

1. Job Distribution

The Tri-State Area continues to be dominated and driven by tourism-related industries. Its largest employment sector in 2011 was Leisure & Hospitality, accounting for 42 percent of its total job base. Laughlin has a string of casinos along the Colorado River, drawing its supply of employment throughout communities in the region. See Exhibit II-1 below.

EXHIBIT II-1: COMPARISON OF JOB DISTRIBUTION BY INDUSTRY SECTOR, BY STUDY REGION: 2011



Source: US Census Bureau LEHD Employment Statistics.

II. Market Area Definition Analysis

2. Location Quotients

A Location Quotient (“LQ”) is one of the most common economic-base analysis techniques. A LQ is an index value for each industrial group in a region calculated by dividing a region’s ratio of employment in a given industry by the nation’s ratio of employment in the same industry for the same time period. Because a LQ looks only at employment, rather than actual importing or exporting of goods and services, it provides only an indirect approach to identifying a local economy’s specialization and concentration of an industry.

The LQ index value can be less than 1.0, equal to 1.0, or greater than 1.0. If the region has the same demand for goods and services as those at the national level, the index value is equal to 1.0. If a given industry’s share of the local economy is less, the index will be less than 1.0 and the region is considered to be an importer of that industry. If it is more, the index will be greater than 1.0 and is assumed that excess production is being exported outside the region.

The LQs herein were calculated for the standard 10 private industry sectors using the US Census Bureau’s LEHD Employment Statistics for the 7-year period between 2004 and 2011.

In this study, the LQs are considered together with two other pieces of information: 1) the size of the industry in terms of jobs, and 2) the percent change in LQ over the 7-year time period. This is important since a small industry with a high LQ may be considered an export-oriented industry, but may not be vital to the region’s economy. However, a large, high-LQ industry with declining LQ over time may negatively impact the regional economy.

When graphed together, the industry sectors fall into one of four quadrants. See Exhibit II-2 below.

II. Market Area Definition Analysis

EXHIBIT II-2: READING LOCATION QUOTIENT CHARTS

Location Quotient	Quadrant 2 <i>Specialized, becoming less specialized</i> Mature sectors that are losing ground	Quadrant 1 <i>Specialized, becoming more specialized</i> Mature, healthy sectors
	Quadrant 3 <i>Unspecialized, becoming less specialized</i> Sectors that need attention	Quadrant 4 <i>Unspecialized, becoming more specialized</i> Potential up-and-coming sectors
	Percent Change in Location Quotient	

- **Quadrant 1:** the LQ in 2011 is above the national average (specialized) and the change in LQ is positive (growing), indicating an industry sector that is relatively mature and growing.
- **Quadrant 2:** the LQ in 2011 is above average (specialized), but the change in LQ is negative (declining), indicating a large industry that is losing ground.
- **Quadrant 3:** the LQ in 2011 is below average (unspecialized) and change in the LQ is negative (declining), indicating an industry that may need attention and to attract more businesses in order to maintain a balanced economy.
- **Quadrant 4:** the LQ in 2011 is below average (unspecialized) but change in the LQ is positive (growing), indicating an industry that may present up-and-coming economic opportunity.

II. Market Area Definition Analysis

In Exhibit II-3, the Y-axis — “LQ (2011)” - shows the LQ of various industries in the Tri-State Area relative to the nation in 2011.

The X-axis — “% Change in LQ (2004 to 2011)” — represents the change in an industry’s LQ from 2004 through 2011. Positive change indicates that the area saw increasing specialization for that industry sector over time.

The only industry that the Tri-State Area had a concentration of employment significantly higher than the national average was Leisure & Hospitality, with a LQ value of 4.3. Despite the high LQ value, this industry has declined over the past 7 years, as shown by its placement in Quadrant 2 of the chart. The surrounding Las Vegas, Kingman and Lake Havasu SMAs also a Leisure & Hospitality sector with a higher than national average LQ value, however their LQ values have grown during the same time period (Quadrant 1).

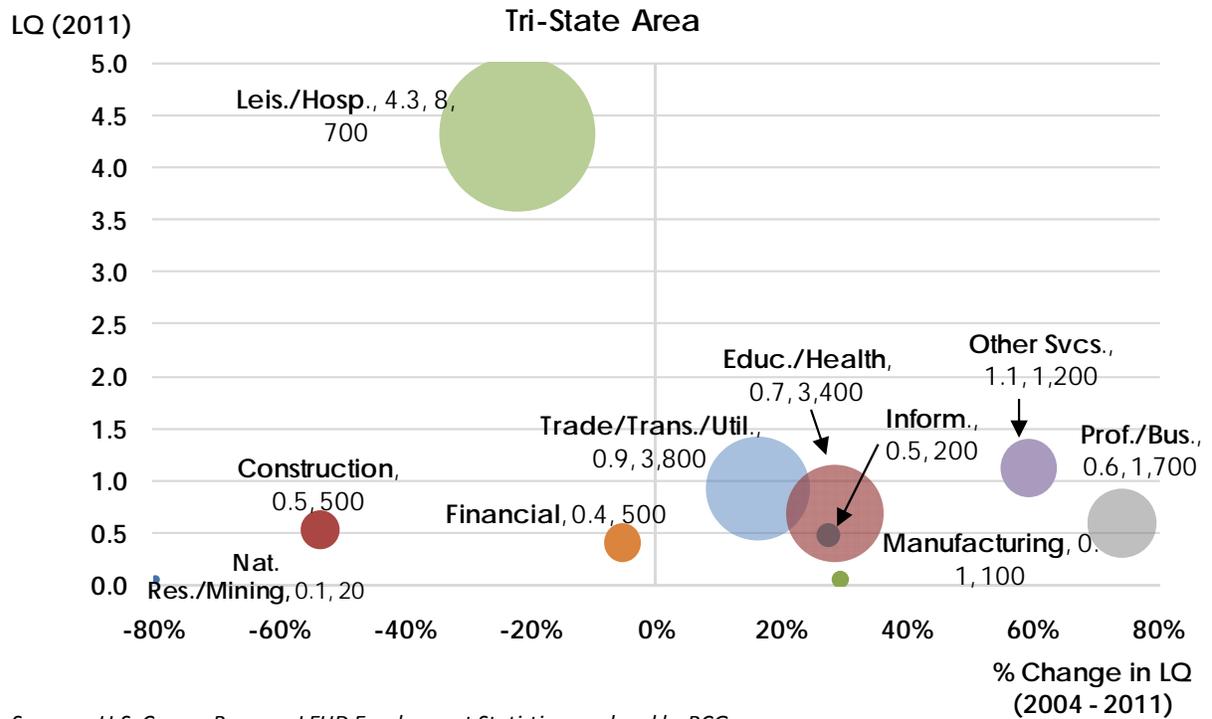
The Other Services industry was slightly higher than the national average, with a LQ value of 1.1. This industry was the only industry in the Tri-State Area located in Quadrant 1. Unfortunately, this industry only accounts for approximately 6 percent of all employment in the area.

The Tri-State Area does have several growing industries that may potentially grow into “export” industries. The Trade/Transportation/Utility industry, Education/Health industry, Professional/Business Service industry, Information industry, and Manufacturing industry all have LQ values of less than 1.0 but have grown over the past seven years. If a growth trend for these industries continues, they have potential to move into Quadrant 1 of the graph, making them healthy mature sectors of this area’s economic base.

The remaining three industries, Construction, Financial, and Natural Resources/Mining, fall in Quadrant 4 of the location quotient chart.

II. Market Area Definition Analysis

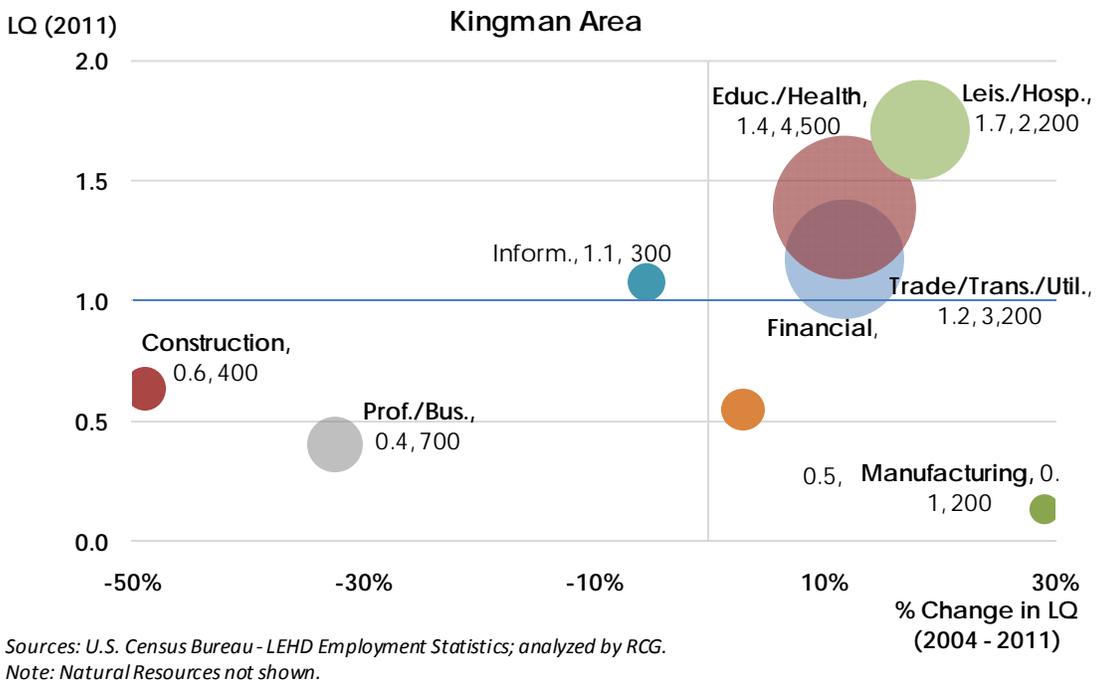
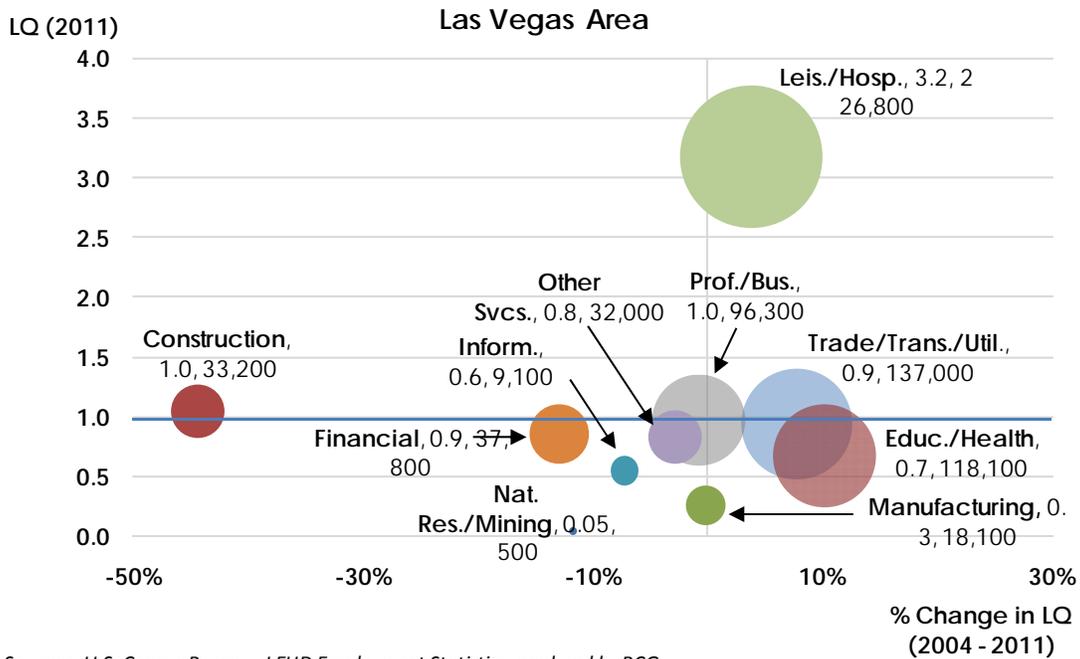
EXHIBIT II-3: TRI-STATE AREA – PRIMARY MARKET AREA
INDUSTRY SIZE, LOCATION QUOTIENTS AND PERCENT CHANGE IN LQ, 2004 – 2011



Sources: U.S. Census Bureau - LEHD Employment Statistics; analyzed by RCG.

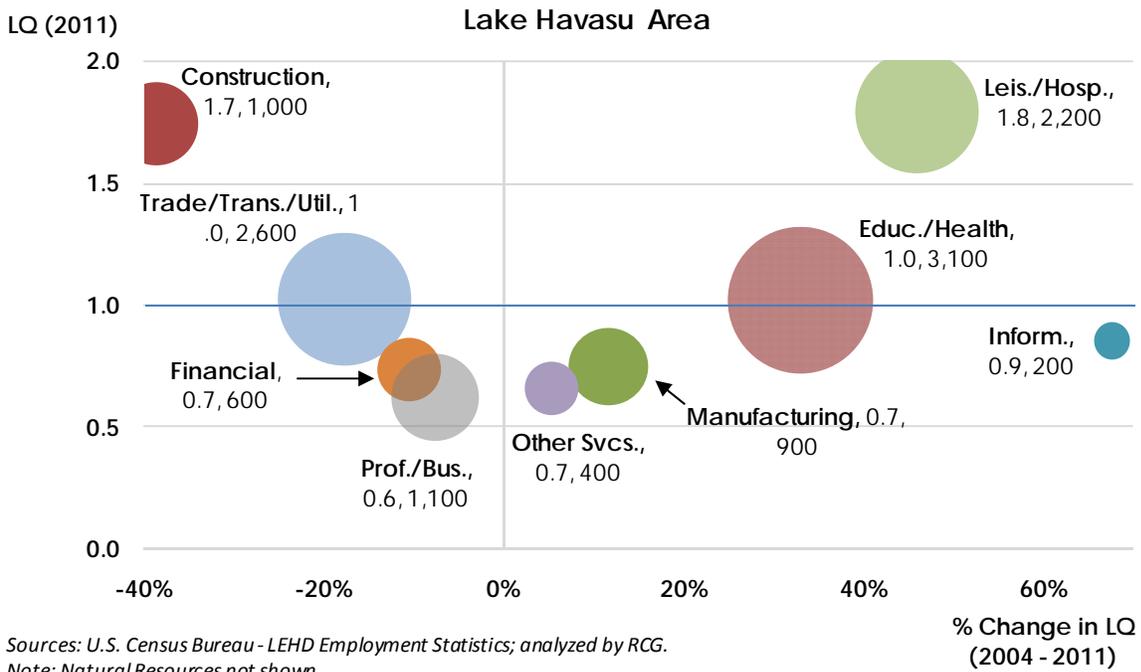
II. Market Area Definition Analysis

EXHIBIT II-4: SECONDARY MARKET AREAS
INDUSTRY SIZE, LOCATION QUOTIENTS AND PERCENT CHANGE IN LQ, 2004 – 2011



II. Market Area Definition Analysis

EXHIBIT II-4: SECONDARY MARKET AREAS (CONT'D)
INDUSTRY SIZE, LOCATION QUOTIENTS AND PERCENT CHANGE IN LQ, 2004 – 2011



DEMAND AND SUPPLY ANALYSIS

In describing what makes a development site a “hub of regional significance”, it is essential to take into account economic as well demographic factors.

Understanding the importance to Clark County to create major employment prospects, it is critical to draw the appropriate economic clusters. For the Southland Site to attract the right combination of residential and non-residential development, it will need to be the kind of place that is desirable for mixed-use development. Accordingly, the challenge and strategy will be to produce physical and demographic ecosystems that have the ingredients to attract a variety of land uses/developments, because of relatively trouble-free access to jobs, a mix of housing, civic and recreational amenities, as well as areas for elite living and executive tastes.

As we have noted, the focus of this study is to assist the Town of Laughlin and the Clark County Board of County Commissioners in determining the highest and best use of the 9,000-acre parcel owned by Clark County in Laughlin. Given the large size of the Southland site for development and its current undeveloped condition, there is a paucity of reliable comparable market development activity in the area. Thus, the primary research in this section of our study lies in primary (interview approach) as opposed to secondary (data collection) research. Specifically, the RCG team conducted extensive outreach to public sector and private sector entities involved in Laughlin to verify the subject site's potential development opportunities and constraints. The Consultant Team also relied on prior studies of land use and economic development in Laughlin as a framework for the interviews, as well as suggesting a new strategy of mixed-use development for the Southland site discussed in more detail below.

We would like to give special thanks to the following organizations that provided excellent input to the research of this highest and best use study.

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Laughlin:

Laughlin Chamber of Commerce
Laughlin Economic Development Corporation

Clark County:

Laughlin Town Manager's Office
Department of Comprehensive Planning/Economic Development

Utilities and Flood Control:

Clark County Regional Flood Control District
NV Energy
Southwest Gas Corporation

Consultants:

VTN Consulting Engineers, Planners and Surveyors

The majority of these interviews were conducted in person, combined with follow-up interviews, and contacts based on the genuine enthusiasm of the agencies and individuals listed above in the economic development of Laughlin. As discussed below, every effort was made to conduct these interviews in a confidential atmosphere, in order to fully and honestly discuss issues that impact the depth and breadth of potential economic development of the Southland site and in the area.

Consequently, the information obtained was of a qualitative nature, but extremely insightful, and very practical in helping to understand the underlying dynamics that support or hinder the development of the large property. The information is also useful in more fully understanding the data collected through secondary research included elsewhere in this report in the prior sections above.

II. THE INTERVIEW PROCESS

The interview process was designed to elicit an open and free flowing dialogue with an absence of predetermined outcomes. This was accomplished through questions on: market demand, supply constraints, transportation capacities and the role of Clark County in encouraging development of the Southland site. It is important to note that a standardized questionnaire was not utilized. This resulted in the interviews focusing on the priorities of the individual respondents and responses that were not influenced in a predetermined way. Importantly, this also resulted in discussions that allowed for comments and ideas to be introduced by the respondents that gave further insights into the Laughlin development process and allowed for the flexibility to delve into details that assisted in the development of the conclusions and strategic recommendations in this report.

At the outset of each interview, the respondent(s) were informed that no quotes used in the report would be directly attributed to them, nor would any particular piece of information be attributed to an individual unless it was in support of a direct quote obtained through secondary research and referenced herein.

Consequently, the responses provided below, while combined for brevity, are intended to directly reflect the thoughts of the respondents to the greatest extent possible. The interviews were conducted over a three-month period and included the diverse cross section of the public and private sectors listed above.

A. Key Responses

The overall interview observations presented here a high-level summary where each point will be addressed in more detail below.

III. Demand and Supply Analysis

- There was an overwhelming positive response to the Consultant Team's recommendation for development to be fostered within a mixed land use concept at the Southland site.
- There was agreement that the Consultant Team's recommendation for the use of an experienced national or international master developer for the site was sound.
- The basic targeted industries identified in previous studies for the Laughlin area were still viable but needed to be considered within the context of a mixed-use master development plan.
- Providing utilities to such large site is a challenge but technically feasible and a preliminary flood control plan is in place, although needing eventual implementation and refinement.
- Fundamentally, sound transportation assets were accessible but need to be studied in depth given the joint nature of these with the California and Arizona jurisdictions in the Tri-State area.
- Enhanced coordination and collaboration between Clark County, a potential master developer and the local community is required and the enthusiasm and interest of all interviewees suggests future success in this area.

III. DEMAND ISSUES

A. Mixed-Use

Mixed-use development is a combination of primarily residential, commercial and business park/industrial uses. In its best practice, these mixed-uses are functionally integrated. The Consultant Team has experience in both small-scale and large-scale residential, commercial and industrial development from the perspectives of the private and the public sectors.

After a review of the subject site and prior studies of the area, the Consultant Team approached the interviews with a recommendation of a mixed-use development for the property.

It is important to note that a mixed –use development is in contrast to traditional target industry studies, which focus primarily on business park/industrial properties and development.

The Consultant Team suggested a broad outline for this development which can be summarized as follows:

Due to the large scale of the Southland site, it is recommended that a mixed land use plan be created by the developer and approved by the County. As noted, primary land uses should be residential, commercial and business park/industrial.

The Needles Highway bisects the Southland site and provides an excellent boundary for industrial development on the west side of the roadway with residential and commercial on the east side of the highway.

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The potential business park/industrial uses will take advantage of the Needles Highway frontage, opportunities for a future rail spur, and the minor slope elevation changes to the west. The VTN engineering report, which investigated industrial sites in this area, proved to be positive due to both the excellent topography west of the highway and closeness to existing utilities.¹

Overall, it appears that there is approximately 5,000 acres west of the highway with at least half of the property available for immediate development. However, a large flood control system needs to be developed within this area to mitigate future run offs from this alluvial fan above the business park/industrial users and downstream for the residential and commercial users across the highway to the east.

A summary of the interview response and the Consultant Team's expertise indicates the following:

- Residential uses should be developed between the Needles Highway and the Colorado River. It is recommended that these residential uses also be mixed including, active senior living housing, high-end villages to take advantage of the views of the river and Arizona mountains and workforce housing for Laughlin residents and others.
- These residential areas should also include several land use amenities to promote the desirability of the development, including hiking and biking trails connecting the site with the Laughlin tourism district and existing parks to the north, civic and meeting places, and pocket parks for viewing the river. Successful senior living communities in Las Vegas and Phoenix (such as the Del Webb Sun City projects) also include recreational features, such as

¹ The VTN engineering study looked at three alternative locations for a potential 400 acre industrial park. The VTN study is one of the eight studies shown in Section IV of this report which serve as a set of reference studies for economic development in the Laughlin area. It is highly recommended that these studies be reviewed by parties interested in the Southland development.

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executive golf courses, tennis courts and community centers. Note the emphasis on executive golf courses² rather than traditional golf course.

- Commercial uses at the Southland site will be able to take advantage of the new residential units and will be developed primarily after the completion of the first phases of the residential development. Commercial land uses will also take advantage of the Needles Highway frontage and with the creation of a second bridge between Laughlin and Bullhead City, Arizona. The second bridge is planned to enter the subject site and create new commercial land uses along the bridge roadway and where it intersects with the Needles Highway.

IV. THE IMPORTANCE OF A NATIONAL OR INTERNATIONAL MASTER PLAN DEVELOPER

Based on the Consultant Team's prior experience, it is highly recommended that for the County, to achieve the highest and best use of the Southland site, that it retains a national or international development firm that has experience in creating successful master planned projects. It is also strongly recommended that the entire site be sold and not leased to this selected firm.³ To obtain development financing for the project the developer must have ownership of the site. Financing for site development is, of course, critical. The financing restrictions on such large-scale development without ownership of the site may well be severe.

- There was general agreement that the Southland site should also be sold using the State of Nevada real estate statutes (NRS 244.2815) that provide sole source sales of public lands for economic development and job creation

² An executive golf course has a numerous par-3 holes and fewer of par-4 and/or par-5 holes in order that the course can be shorter and be played quickly. It is a good alternative for beginning golfers and seniors. Many executive courses are only nine holes.

³ As discussed in Section IV, it is assumed of course that the County, in any negotiations, will use its experience to negotiate such issues as performance and "clawback" provisions.

III. Demand and Supply Analysis

projects. This regulation also provides that the sale price for the land can be below market appraisal prices. This financial incentive encourages the savings of the sale price of the land to be used for infrastructure costs needed for large scale vacant parcels, because of the high risks of developing such large parcels.

- If properly managed, the County's and the State's economic benefits from the project will be significantly increased property and sales taxes along with job creation and diversification for the Laughlin area.

A. Target Industries

As discussed in Section IV of this report, a significant set (eight) of studies exist that have addressed many of the elements in a strategic marketing plan for the site.⁴ In general, all of these reports and plans make specific references to applicable industry targets. These target and growth industries serve as the foundation for a business recruitment, marketing and capture strategy. In turn, the highest and best land uses for the 9,000-acre Southland site must be aligned with these industry targets.

- The interviewees and this report, based on our review, agree with the assessments of industry targets outlined in the more recent studies listed in Section IV.
- The selected industry targets include industries such as:
 - Transportation and Warehousing

⁴ As listed in Section IV, we draw the reader's attention particularly to the report titled "The Mohave County, Arizona Target Industry Analysis", written by ESI Corporation, Phoenix, AZ, July 2011, 127 pages.

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- Selected targets in manufacturing within sectors such as: Fabricated Metals, Plastics and Electronics
- Selected opportunities in Healthcare Services

- Interviewees felt that mixed-use development would significantly foster industry development within healthcare services as identified in prior studies but also have the additional potential to augment development in retail trade and wholesale trade. The Consultant Team agrees with this assessment.

- The Consultant Team and interviewees also felt that the industry targets could be assisted by the recent 2014 FAA designation of Nevada as a test site for the unmanned aircraft vehicle industry. The Consultant Team recommends that those involved with future Laughlin development make contact with the Aerospace & Defense Industry representative of the Governor's Office of Economic Development ("GOED"). GOED is taking a lead position on exploiting opportunities related to the FAA designation.

V. SUPPLY ISSUES

A. Infrastructure: Utilities and Flood Control

The Consultant Team recognized early on in its review of the site that providing infrastructure to a 9,000-acre site is challenging from both a financial aspect and topography. The good news from a development perspective is that the site is near electric, water and natural gas services with excellent providers that can execute large scale development plans:

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- Both agencies and utilities interviewed recognize that the financial costs for such large-scale infrastructure projects can be a large burden to either the public agencies or the private developer. Creative and collaborative options need to take place to insure the development of the site. Public and private partnerships need to be created to make this site financially feasible. The use of Local Improvement Districts, bonding, and repayment plans are successful examples of these partnerships.
- The challenging perspectives are in regard to the financial costs of the flood control infrastructure and an onsite waste water treatment facility that would service the entire 9,000 acres. The location of the flood control project would be initiated on the west side of the Needles Highway to capture the rainfall and drainages above the proposed industrial uses. The flood control of the Eastside would be contingent on the locations of the residential and commercial users.
- The waste water treatment facility needs to be located on the east side of the Needles Highway to take advantage of the slope of the land, plus gravity, as it drains to the Colorado River and eliminate the costs of pumping stations in the design of the facility. It doesn't appear to be economically feasible to connect the Southland site to the existing Laughlin treatment facilities.

B. Transportation Assets

As we have noted throughout, Southland site has three major transportation assets. The Needles Highway presents a development opportunity for the entire site, the future location of the second bridge connecting Laughlin to Bullhead City, Arizona runs parallel through the site, and the concept of extending rail service

III. Demand and Supply Analysis

from the Needles, California area into site opens new business park/industrial and logistics opportunities:

- Of these transportation assets the Needles Highway is the most noteworthy, due to the excellent condition of this roadway within the project site area. The downside of this equation, though, is the poor condition of the highway from the project site to the Needles. When the highway leaves the Southland site, it becomes a State of California roadway and it has not been maintained to the standards of the Nevada side. With increased truck traffic serving the Southland site, the southern section of the Needles Highway will be a major constraint until it is repaired, improved and widened to handle these new volumes traffic.
- The second bridge to Bullhead City will be a significant asset to the Southland site and Laughlin's economy. With the creation of new commercial projects on the site, there will be an increase in retail sales from Arizona residents into Laughlin.
- The potential for new rail into the site has been discussed by the local development agency and explored with a recent consultant's study. However, this asset needs to be examined in more depth, with detailed financial analysis, and direct railroad participation and input. For now this should best be viewed as a long range opportunity and not a major influence within this highest and best use study.

C. Workforce Availability

Prior economic development studies for Laughlin are consistent with their peers in other communities, namely that workforce development to support industry attracting is an issue that needs to be addressed. The findings of these prior studies are consistent with the labor profile for the area as outlined in Section II of this report in terms of providing a skilled workforce.

It is important to note that availability of a skilled workforce in Laughlin was identified as a major factor required supporting the target industries in the studies outlined in Section IV of this report.⁵

The Appendix to this section (Occupational Profiles by Industry) provides for targeted industries and related industries, which came up during the interview process and an overview of the required occupations by industry. Also shown in the tables are the educational requirements associated with the individual occupations. These tables are lengthy and exhaustive, yet as an overview they illustrate in detail for the interested reader the skilled workforce suggested in prior studies. We chose the top 40 occupations under each category (e.g., manufacturing) and each sub-category (e.g., plastics and rubber products manufacturing) relative to the percent share that each occupation represented.

Fortunately, the Governors Workforce Investment Board ("GWIB"), which oversees federally funded training programs and workforce development in Nevada, has been reorganized around industry sector councils to facilitate faster response to local

⁵ Specifically, see the location factors discussed for the target industries in "Colorado River Targeted Economic Development Analysis: A Community Business Matching Model Approach", written by the Cooperative Extension Office of the University of Nevada Reno, 2008, 170 pages.

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needs.⁶ These industry sector councils include Clean Energy, Logistics and Operations, Manufacturing, Healthcare and Medical Services, Information Technology, and Aerospace and Defense.

- Interviewees agreed with the Consultant Team's recommendation that a cooperative relationship be established with GWIB. This should include two elements. First, a working relationship with the senior administration of the agency needs to be established. Second, a specific interaction with relevant

GWIB sector councils are required since these sector councils directly parallel the targeted industries for Laughlin.

- There was a general willingness to explore new employer options for workforce training within these sector councils and other Nevada programs through DETR (Nevada Department of Employment, Training, and Rehabilitation) such as the Career Enhancement Program and Silver State Works.⁷

VI. PARTNERING IN THE DEVELOPMENT PROCESS: PUBLIC AND PRIVATE FACTORS

The Consultant Team strongly believes that from an economic development perspective to develop such a large site to its highest and best use, a concerted and formal and coordinated public-private partnership ("3P") process is required. If successful, this process will result in the creativity and incentives mandatory for a successful development of the Southland site.

⁶ For a GWIB roadmap, see the November 2013 report:
<http://www.doleta.gov/performance/results/AnnualReports/PY2012/NVWIAAnnualReport2012.pdf>

⁷ A list of employer programs available in this regard are shown at:
<http://www.nvdetr.org/esd%20pages/employer%20services.htm>

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There are two aspects to this enhanced coordination within the development process. These two aspects are enhanced cooperation among entities directly involved with local Laughlin economic development and, in addition, the County's planning relationship with the (proposed) master developer.

Based on the experience of the Consultant Team and the interviews, both initially and through follow-up contacts and discussion, a set of four overall recommendations have emerged:

- It is recommended that the utility and service providers to the Southland site be engaged on a regular basis with the appropriate County staff to work on collaborative efforts to service the site. Currently, this sharing of information on the proposed uses and timeframes for development has not been done. The utilities need to be aware of the "big picture" and not just singular projects or proposed phases of the site. This will facilitate better utility planning with respect to infrastructure costs from a total project perspective.
- The coordination of planning information also needs to occur within the County among and between relevant departments. The departments of Public Works, Comprehensive Planning, Economic Development, Town Manager's Office and Real Estate need to be a team and share data, information and recommendations to insure the development success of the Southland site.
- In the negotiation with a master plan developer, the County needs to take advantage of its formal Development Plan Agreement process. This process will outline the roles of each party and agree on timelines and penalties for noncompliance.
- The County's planning and permitting process should be reviewed and negotiated with the selected master developer. It is highly recommended

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that a special and expedited review and permitting process for the Southland site be created by the Board of County Commissioners. By having in place a “fast track” system for the Southland site and its mixed-use development

units, the developer can have more certainty for the timetable of approvals. Such certainty in planning and permitting will assist the project to properly move forward with as few delays as possible.

A. Project Timeline: Phased-Development

Given the Southland site’s large size, it is obvious but important to note that development phasing will occur over a considerable period of time. The Southland site is clearly not a “single project” development, and will require different sized and phased “residential villages” and “business park/industrial and commercial districts”.

Laughlin needs to anticipate that it is almost certainly going to experience a pattern of cyclical development. This is due not only to a function of general economic conditions but the different types of land use that comprise mixed-use development. The components of mixed-use projects generally follow different cycles. For example, both retail and commercial development usually follow successful residential development. Although industrial development requires, of course, adequate infrastructure and an appropriate skilled workforce, it has a more independent development cycle.

The discussion above also reinforces the recommendation that successful phased development is facilitated by having a master real estate developer in charge of the site as discussed in this report.

III. Demand and Supply Analysis

Based upon the interviews and the experience of the Consultant Team, several key observations can be made and/or recapped on the potential phasing of the development process:

- The primary business park/industrial area lies in the approximately 5,000 acres on the west side of Needles Highway. Further, the most immediate acreage for development is likely the 3,000 acres closest to the highway and below (or east) of the proposed water drainage and entrapment infrastructure⁸. The balance of the business park/industrial area will be located uphill and west of the proposed water entrapment basin facilities. This acreage will be more challenging to develop due to the steepness of the topography and the infrastructure needed to supply the potential businesses in this area. The 2,000-acre balance can be developed, but not in the immediate or near future. This site could be revisited in 10-15 years to see what the need for additional business park/industrial land will be.

Potentially, the 3,000 acres near the Needles Highway could have three phases/districts, with multiple uses, for industrial development with each having 1,000 gross acres. The build-out of the business park/industrial acreage would be about 10 years for each phase (or 1,000 acres each) for a total or maximum 30 year build-out. Obviously, this schedule could potentially be shortened if the phases partially overlap. We would anticipate net acreage in the range of 750-800 acres per phase/district.

- The primary site for a mixed-use project comprising residential/retail/commercial villages is the 4,000 acres on the east side of the Needles Highway. This area is located near and facing the Colorado River with the best scenic views. It is expected that this area would also be

⁸ See the recommended drainage channel improvement in Section I, Exhibit I-4.

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developed in a phased manner, and that it will have a relatively large open-space component.

- The residential phases might be as many as four with approximately 3,000 gross acres being used for the mixed residential types (including land for drainage areas, hiking trails, park space, potential sewer treatment facilities, roads, setbacks, etc.) Thus, each of the four phases or villages for the residential projects could be in the range of 500 acres. Based on our experience the net acreage would be around 350 per residential village. It is possible that the build-out could span a period of 32 years (or an average of eight years per each phase). However, a detailed residential absorption study would be required to more accurately determine the absorption schedule. And this study would need to be updated periodically to keep it current

However, depending on market conditions and national economic conditions, it might be possible to shorten the residential development cycle if product differentiation allowed alternative residential villages or communities to be developed in parallel. For example, the concurrent development of senior retirement housing in conjunction with a higher-end development or family/workforce development (or both) could shorten the cycle.

- It appears that the commercial space/office space could be in the range of a maximum of 400-500 gross acres. Based on interviews and our experience, the east side area's greatest retail development potential lies in the portion of the 4,000 acres located around the T-intersection of the new bridge road (connecting Bullhead City) where it intersects with the Needles highway.

Overall, this could represent a total of 300-375 net acres, which would also include acres within the residential villages (for grocery shopping and other shopping center areas with services/ food etc. within walking distance of the

III. Demand and Supply Analysis

residential areas). Again, there would be three phases (for commercial/office and retail) with a shorter time frame of 25 years to build-out, which could be reduced based on market conditions and the successful marketing the Southland site's residential villages and its businesses and industrial park districts. As discussed above, it would be expected that this phasing would start later after the initial phase of the residential development.

VII. CONCLUSION

The development of the Southland site is a long-term project requiring a very coordinated 3P process that will further require a great deal of what we call the "3Ts" – talent, time and treasure. And we would like to add a fourth component – political will by the Clark County Commission. It will also necessitate the proactive support of the State of Nevada, and the interest of utility providers, end-users and the transportation industry. Development of such a large site in a semi-rural area is a very challenging undertaking that should be measured in decades not years.

Appendix: Occupational Profiles by Industry

Clark County NAICS 31-33 Manufacturing

Occupation	Employed in Industry Group (2013)	% of the Total Jobs in Industry Group (2013)	Median Hourly Earnings	Education Level
Team Assemblers	1,420	6.3%	\$12.47	Moderate-term on-the-job training
Printing Press Operators	918	4.1%	\$16.58	Moderate-term on-the-job training
Helpers--Production Workers	827	3.7%	\$11.43	Short-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	737	3.3%	\$23.87	Moderate-term on-the-job training
First-Line Supervisors of Production and Operating Workers	711	3.2%	\$22.88	Work experience in a related occupation
Shipping, Receiving, and Traffic Clerks	639	2.8%	\$13.91	Short-term on-the-job training
Laborers and Freight, Stock, and Material Movers, Hand	635	2.8%	\$13.34	Short-term on-the-job training
Inspectors, Testers, Sorters, Samplers, and Weighers	523	2.3%	\$15.79	Moderate-term on-the-job training
General and Operations Managers	521	2.3%	\$41.30	Bachelor's or higher degree, plus work experience
Managers, All Other	502	2.2%	\$24.60	Work experience in a related occupation
Office Clerks, General	502	2.2%	\$14.38	Short-term on-the-job training
Maintenance and Repair Workers, General	402	1.8%	\$22.74	Moderate-term on-the-job training
Packers and Packagers, Hand	389	1.7%	\$11.07	Short-term on-the-job training
Customer Service Representatives	383	1.7%	\$14.29	Short-term on-the-job training
Packaging and Filling Machine Operators and Tenders	353	1.6%	\$12.21	Moderate-term on-the-job training
Heavy and Tractor-Trailer Truck Drivers	342	1.5%	\$19.64	Short-term on-the-job training
Bakers	341	1.5%	\$13.51	Long-term on-the-job training
Graphic Designers	318	1.4%	\$20.30	Bachelor's degree
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	308	1.4%	\$15.60	Moderate-term on-the-job training
Food Batchmakers	297	1.3%	\$18.90	Short-term on-the-job training
Industrial Truck and Tractor Operators	274	1.2%	\$14.85	Short-term on-the-job training
Bookkeeping, Accounting, and Auditing Clerks	271	1.2%	\$16.24	Moderate-term on-the-job training
Industrial Machinery Mechanics	253	1.1%	\$23.74	Long-term on-the-job training
Sewing Machine Operators	251	1.1%	\$13.31	Short-term on-the-job training
Industrial Production Managers	246	1.1%	\$45.00	Bachelor's or higher degree, plus work experience
Assemblers and Fabricators, All Other	225	1.0%	\$13.03	Moderate-term on-the-job training
Stock Clerks and Order Fillers	223	1.0%	\$11.41	Short-term on-the-job training
Production Workers, All Other	204	0.9%	\$16.75	Moderate-term on-the-job training
Welders, Cutters, Solderers, and Brazers	201	0.9%	\$18.79	Postsecondary non-degree award
Print Binding and Finishing Workers	199	0.9%	\$15.37	Short-term on-the-job training
Cabinetmakers and Bench Carpenters	199	0.9%	\$17.43	Moderate-term on-the-job training
Machinists	195	0.9%	\$19.81	Long-term on-the-job training
Light Truck or Delivery Services Drivers	190	0.8%	\$14.23	Short-term on-the-job training
Accountants and Auditors	182	0.8%	\$26.44	Bachelor's degree
Unclassified Occupation	170	0.8%	\$19.76	N/A
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	166	0.7%	\$13.46	Short-term on-the-job training
Molders, Shapers, and Casters, Except Metal and Plastic	162	0.7%	\$14.16	Long-term on-the-job training
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	157	0.7%	\$17.08	Short-term on-the-job training
Electrical and Electronic Equipment Assemblers	153	0.7%	\$15.01	Short-term on-the-job training
Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	145	0.6%	\$16.73	Moderate-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 326 Plastics and Rubber Products Manufacturing

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Team Assemblers	117	6.9%	\$12.47	Moderate-term on-the-job training
Inspectors, Testers, Sorters, Samplers, and Weighers	82	4.8%	\$15.79	Moderate-term on-the-job training
Helpers--Production Workers	81	4.8%	\$11.43	Short-term on-the-job training
Packers and Packagers, Hand	80	4.7%	\$11.07	Short-term on-the-job training
First-Line Supervisors of Production and Operating Workers	73	4.3%	\$22.88	Work experience in a related occupation
Shipping, Receiving, and Traffic Clerks	70	4.1%	\$13.91	Short-term on-the-job training
Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	70	4.1%	\$16.73	Moderate-term on-the-job training
Laborers and Freight, Stock, and Material Movers, Hand	68	4.0%	\$13.34	Short-term on-the-job training
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	54	3.2%	\$15.60	Moderate-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	51	3.0%	\$23.87	Moderate-term on-the-job training
Maintenance and Repair Workers, General	50	2.9%	\$22.74	Moderate-term on-the-job training
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	45	2.6%	\$18.21	Moderate-term on-the-job training
General and Operations Managers	39	2.3%	\$41.30	Bachelor's or higher degree, plus work experience
Packaging and Filling Machine Operators and Tenders	35	2.1%	\$12.21	Moderate-term on-the-job training
Printing Press Operators	35	2.1%	\$16.58	Moderate-term on-the-job training
Industrial Machinery Mechanics	34	2.0%	\$23.74	Long-term on-the-job training
Industrial Truck and Tractor Operators	31	1.8%	\$14.85	Short-term on-the-job training
Office Clerks, General	30	1.8%	\$14.38	Short-term on-the-job training
Customer Service Representatives	29	1.7%	\$14.29	Short-term on-the-job training
Industrial Production Managers	25	1.5%	\$45.00	Bachelor's or higher degree, plus work experience
Fiberglass Laminators and Fabricators	24	1.4%	\$14.98	Moderate-term on-the-job training
Stock Clerks and Order Fillers	22	1.3%	\$11.41	Short-term on-the-job training
Industrial Engineers	17	1.0%	\$36.05	Bachelor's degree
Bookkeeping, Accounting, and Auditing Clerks	15	0.9%	\$16.24	Moderate-term on-the-job training
Machine Feeders and Offbearers	15	0.9%	\$12.39	Short-term on-the-job training
Accountants and Auditors	15	0.9%	\$26.44	Bachelor's degree
Metal Workers and Plastic Workers, All Other	14	0.8%	\$14.25	Moderate-term on-the-job training
Cutting and Slicing Machine Setters, Operators, and Tenders	14	0.8%	\$16.36	Short-term on-the-job training
Production, Planning, and Expediting Clerks	13	0.8%	\$21.09	Moderate-term on-the-job training
Production Workers, All Other	13	0.8%	\$16.75	Moderate-term on-the-job training
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	13	0.8%	\$12.19	Moderate-term on-the-job training
Purchasing Agents, Except Wholesale, Retail, and Farm Products	13	0.8%	\$23.35	Long-term on-the-job training
Managers, All Other	13	0.8%	\$24.60	Work experience in a related occupation
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	12	0.7%	\$13.46	Short-term on-the-job training
Sales Managers	12	0.7%	\$37.61	Bachelor's or higher degree, plus work experience
Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	11	0.7%	--	Moderate-term on-the-job training
First-Line Supervisors of Office and Administrative Support Workers	11	0.7%	\$21.65	Work experience in a related occupation
Chemical Equipment Operators and Tenders	11	0.6%	\$21.14	Moderate-term on-the-job training
Maintenance Workers, Machinery	10	0.6%	--	Moderate-term on-the-job training
Mixing and Blending Machine Setters, Operators, and Tenders	10	0.6%	--	Moderate-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 332 Fabricated Metal Product Manufacturing

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Team Assemblers	102	5.7%	\$12.47	Moderate-term on-the-job training
Welders, Cutters, Solderers, and Brazers	101	5.7%	\$18.79	Postsecondary non-degree award
Machinists	88	4.9%	\$19.81	Long-term on-the-job training
Helpers--Production Workers	84	4.7%	\$11.43	Short-term on-the-job training
Sheet Metal Workers	84	4.7%	\$18.08	Long-term on-the-job training
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	83	4.6%	\$15.60	Moderate-term on-the-job training
First-Line Supervisors of Production and Operating Workers	71	4.0%	\$22.88	Work experience in a related occupation
Shipping, Receiving, and Traffic Clerks	61	3.4%	\$13.91	Short-term on-the-job training
Office Clerks, General	57	3.2%	\$14.38	Short-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	56	3.2%	\$23.87	Moderate-term on-the-job training
General and Operations Managers	55	3.1%	\$41.30	Bachelor's or higher degree, plus work experience
Inspectors, Testers, Sorters, Samplers, and Weighers	55	3.1%	\$15.79	Moderate-term on-the-job training
Structural Metal Fabricators and Fitters	49	2.8%	\$16.67	Moderate-term on-the-job training
Laborers and Freight, Stock, and Material Movers, Hand	44	2.5%	\$13.34	Short-term on-the-job training
Managers, All Other	36	2.1%	\$24.60	Work experience in a related occupation
Maintenance and Repair Workers, General	29	1.6%	\$22.74	Moderate-term on-the-job training
Computer-Controlled Machine Tool Operators, Metal and Plastic	27	1.5%	\$16.15	Moderate-term on-the-job training
Bookkeeping, Accounting, and Auditing Clerks	26	1.5%	\$16.24	Moderate-term on-the-job training
Cost Estimators	24	1.3%	\$28.08	Bachelor's degree
Industrial Production Managers	23	1.3%	\$45.00	Bachelor's or higher degree, plus work experience
Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	22	1.2%	\$18.30	Postsecondary non-degree award
Customer Service Representatives	21	1.2%	\$14.29	Short-term on-the-job training
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	18	1.0%	\$17.08	Short-term on-the-job training
Stock Clerks and Order Fillers	16	0.9%	\$11.41	Short-term on-the-job training
Industrial Machinery Mechanics	15	0.9%	\$23.74	Long-term on-the-job training
Purchasing Agents, Except Wholesale, Retail, and Farm Products	15	0.8%	\$23.35	Long-term on-the-job training
Mechanical Drafters	15	0.8%	\$17.29	Associate's degree
Assemblers and Fabricators, All Other	15	0.8%	\$13.03	Moderate-term on-the-job training
Light Truck or Delivery Services Drivers	14	0.8%	\$14.23	Short-term on-the-job training
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	14	0.8%	\$12.19	Moderate-term on-the-job training
Packers and Packagers, Hand	14	0.8%	\$11.07	Short-term on-the-job training
Industrial Truck and Tractor Operators	14	0.8%	\$14.85	Short-term on-the-job training
Accountants and Auditors	14	0.8%	\$26.44	Bachelor's degree
Production, Planning, and Expediting Clerks	14	0.8%	\$21.09	Moderate-term on-the-job training
Metal Workers and Plastic Workers, All Other	13	0.8%	\$14.25	Moderate-term on-the-job training
Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic	13	0.7%	\$18.87	Moderate-term on-the-job training
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	12	0.7%	\$13.46	Short-term on-the-job training
Structural Iron and Steel Workers	12	0.7%	--	Long-term on-the-job training
Sales Managers	11	0.6%	--	Bachelor's or higher degree, plus work experience
Industrial Engineers	11	0.6%	--	Bachelor's degree

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 334 Computer and Electronic Product Manufacturing

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Electrical and Electronics Engineering Technicians	67	9.4%	\$32.49	Associate's degree
Electrical and Electronic Equipment Assemblers	61	8.5%	\$15.01	Short-term on-the-job training
Team Assemblers	34	4.7%	\$12.47	Moderate-term on-the-job training
Electronics Engineers, Except Computer	34	4.7%	\$41.35	Bachelor's degree
Inspectors, Testers, Sorters, Samplers, and Weighers	28	3.9%	\$15.79	Moderate-term on-the-job training
Managers, All Other	20	2.7%	\$24.60	Work experience in a related occupation
General and Operations Managers	15	2.1%	\$41.30	Bachelor's or higher degree, plus work experience
Software Developers, Applications	15	2.1%	\$37.96	Bachelor's degree
Industrial Engineers	14	2.0%	\$36.05	Bachelor's degree
Software Developers, Systems Software	14	2.0%	\$38.75	Bachelor's degree
Shipping, Receiving, and Traffic Clerks	14	1.9%	\$13.91	Short-term on-the-job training
Architectural and Engineering Managers	14	1.9%	\$62.02	Bachelor's or higher degree, plus work experience
First-Line Supervisors of Production and Operating Workers	13	1.9%	\$22.88	Work experience in a related occupation
Electrical Engineers	12	1.7%	\$40.58	Bachelor's degree
Engineers, All Other	12	1.6%	--	Bachelor's degree
Purchasing Agents, Except Wholesale, Retail, and Farm Products	11	1.5%	\$23.35	Long-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	10	1.5%	\$23.87	Moderate-term on-the-job training
Accountants and Auditors	10	1.4%	\$26.44	Bachelor's degree
Office Clerks, General	<10	1.4%	--	Short-term on-the-job training
Helpers--Production Workers	<10	1.3%	--	Short-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	<10	1.3%	--	Bachelor's degree
Maintenance and Repair Workers, General	<10	1.3%	--	Moderate-term on-the-job training
Industrial Production Managers	<10	1.3%	--	Bachelor's or higher degree, plus work experience
Customer Service Representatives	<10	1.2%	--	Short-term on-the-job training
Laborers and Freight, Stock, and Material Movers, Hand	<10	1.2%	--	Short-term on-the-job training
Financial Managers	<10	1.1%	--	Bachelor's or higher degree, plus work experience
Stock Clerks and Order Fillers	<10	1.1%	--	Short-term on-the-job training
Semiconductor Processors	<10	1.1%	--	Associate's degree
Bookkeeping, Accounting, and Auditing Clerks	<10	1.0%	--	Moderate-term on-the-job training
Business Operations Specialists, All Other	<10	0.9%	--	Long-term on-the-job training
Production, Planning, and Expediting Clerks	<10	0.9%	--	Moderate-term on-the-job training
Sales Managers	<10	0.8%	--	Bachelor's or higher degree, plus work experience
Computer and Information Systems Managers	<10	0.8%	--	Bachelor's or higher degree, plus work experience
Electromechanical Equipment Assemblers	<10	0.8%	--	Short-term on-the-job training
Computer User Support Specialists	<10	0.8%	--	Associate's degree
Industrial Engineering Technicians	<10	0.7%	--	Associate's degree
Computer Programmers	<10	0.7%	--	Bachelor's degree
Computer Hardware Engineers	<10	0.7%	--	Bachelor's degree
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	<10	0.7%	--	Moderate-term on-the-job training
Marketing Managers	<10	0.7%	--	Bachelor's or higher degree, plus work experience

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 336 Transportation Equipment Manufacturing

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Team Assemblers	86	25.1%	\$12.47	Moderate-term on-the-job training
Assemblers and Fabricators, All Other	17	5.1%	\$13.03	Moderate-term on-the-job training
Inspectors, Testers, Sorters, Samplers, and Weighers	11	3.1%	--	Moderate-term on-the-job training
First-Line Supervisors of Production and Operating Workers	<10	2.7%	--	Work experience in a related occupation
Laborers and Freight, Stock, and Material Movers, Hand	<10	2.6%	--	Short-term on-the-job training
Managers, All Other	<10	2.5%	--	Work experience in a related occupation
Unclassified Occupation	<10	2.3%	--	N/A
Shipping, Receiving, and Traffic Clerks	<10	2.3%	--	Short-term on-the-job training
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	<10	2.0%	--	Moderate-term on-the-job training
Welders, Cutters, Solderers, and Brazers	<10	1.9%	--	Postsecondary non-degree award
General and Operations Managers	<10	1.8%	--	Bachelor's or higher degree, plus work experience
Machinists	<10	1.7%	--	Long-term on-the-job training
Industrial Engineers	<10	1.7%	--	Bachelor's degree
Maintenance and Repair Workers, General	<10	1.6%	--	Moderate-term on-the-job training
Helpers--Production Workers	<10	1.6%	--	Short-term on-the-job training
Electricians	<10	1.6%	--	Long-term on-the-job training
Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	<10	1.4%	--	Postsecondary non-degree award
Industrial Machinery Mechanics	<10	1.4%	--	Long-term on-the-job training
Industrial Truck and Tractor Operators	<10	1.3%	--	Short-term on-the-job training
Production Workers, All Other	<10	1.3%	--	Moderate-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	<10	1.2%	--	Moderate-term on-the-job training
Industrial Production Managers	<10	1.1%	--	Bachelor's or higher degree, plus work experience
Purchasing Agents, Except Wholesale, Retail, and Farm Products	<10	1.0%	--	Long-term on-the-job training
Painters, Transportation Equipment	<10	1.0%	--	Moderate-term on-the-job training
Management Analysts	<10	1.0%	--	Bachelor's or higher degree, plus work experience
Office Clerks, General	<10	1.0%	--	Short-term on-the-job training
Stock Clerks and Order Fillers	<10	1.0%	--	Short-term on-the-job training
Mechanical Engineers	<10	1.0%	--	Bachelor's degree
Automotive Service Technicians and Mechanics	<10	0.9%	--	Postsecondary non-degree award
Accountants and Auditors	<10	0.9%	--	Bachelor's degree
Engineers, All Other	<10	0.8%	--	Bachelor's degree
Production, Planning, and Expediting Clerks	<10	0.8%	--	Moderate-term on-the-job training
Architectural and Engineering Managers	<10	0.7%	--	Bachelor's or higher degree, plus work experience
Computer-Controlled Machine Tool Operators, Metal and Plastic	<10	0.7%	--	Moderate-term on-the-job training
Electrical and Electronic Equipment Assemblers	<10	0.7%	--	Short-term on-the-job training
Aircraft Mechanics and Service Technicians	<10	0.6%	--	Postsecondary non-degree award
Business Operations Specialists, All Other	<10	0.6%	--	Long-term on-the-job training
Customer Service Representatives	<10	0.6%	--	Short-term on-the-job training
Tool and Die Makers	<10	0.6%	--	Long-term on-the-job training
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	<10	0.5%	--	Moderate-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 42 Wholesale Trade

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	5,207	21.3%	\$23.87	Moderate-term on-the-job training
Laborers and Freight, Stock, and Material Movers, Hand	1,779	7.3%	\$13.34	Short-term on-the-job training
First-Line Supervisors of Non-Retail Sales Workers	1,086	4.4%	\$14.51	Work experience in a related occupation
Stock Clerks and Order Fillers	949	3.9%	\$11.41	Short-term on-the-job training
Office Clerks, General	905	3.7%	\$14.38	Short-term on-the-job training
Shipping, Receiving, and Traffic Clerks	868	3.6%	\$13.91	Short-term on-the-job training
Light Truck or Delivery Services Drivers	786	3.2%	\$14.23	Short-term on-the-job training
Driver/Sales Workers	685	2.8%	\$13.31	Short-term on-the-job training
General and Operations Managers	651	2.7%	\$41.30	Bachelor's or higher degree, plus work experience
Customer Service Representatives	649	2.7%	\$14.29	Short-term on-the-job training
Heavy and Tractor-Trailer Truck Drivers	624	2.6%	\$19.64	Short-term on-the-job training
Bookkeeping, Accounting, and Auditing Clerks	491	2.0%	\$16.24	Moderate-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	468	1.9%	\$37.03	Bachelor's degree
Sales Managers	361	1.5%	\$37.61	Bachelor's or higher degree, plus work experience
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	357	1.5%	\$17.08	Short-term on-the-job training
Wholesale and Retail Buyers, Except Farm Products	344	1.4%	\$18.24	Long-term on-the-job training
Industrial Truck and Tractor Operators	302	1.2%	\$14.85	Short-term on-the-job training
Packers and Packagers, Hand	300	1.2%	\$11.07	Short-term on-the-job training
First-Line Supervisors of Office and Administrative Support Workers	263	1.1%	\$21.65	Work experience in a related occupation
Retail Salespersons	248	1.0%	\$11.29	Short-term on-the-job training
Merchandise Displayers and Window Trimmers	222	0.9%	\$12.55	Moderate-term on-the-job training
Accountants and Auditors	221	0.9%	\$26.44	Bachelor's degree
Order Clerks	203	0.8%	\$14.32	Short-term on-the-job training
Team Assemblers	191	0.8%	\$12.47	Moderate-term on-the-job training
Computer, Automated Teller, and Office Machine Repairers	178	0.7%	\$16.84	Postsecondary non-degree award
Parts Salespersons	174	0.7%	\$13.82	Moderate-term on-the-job training
Installation, Maintenance, and Repair Workers, All Other	166	0.7%	\$18.53	Moderate-term on-the-job training
Maintenance and Repair Workers, General	163	0.7%	\$22.74	Moderate-term on-the-job training
First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	125	0.5%	\$23.66	Work experience in a related occupation
Market Research Analysts and Marketing Specialists	125	0.5%	\$26.00	Bachelor's degree
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	123	0.5%	\$25.51	Work experience in a related occupation
Business Operations Specialists, All Other	118	0.5%	\$31.08	Long-term on-the-job training
Inspectors, Testers, Sorters, Samplers, and Weighers	116	0.5%	\$15.79	Moderate-term on-the-job training
Demonstrators and Product Promoters	114	0.5%	\$14.07	Short-term on-the-job training
Computer User Support Specialists	111	0.5%	\$20.48	Associate's degree
Financial Managers	107	0.4%	\$33.49	Bachelor's or higher degree, plus work experience
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	105	0.4%	\$13.46	Short-term on-the-job training
Billing and Posting Clerks	104	0.4%	\$17.60	Short-term on-the-job training
Sales Representatives, Services, All Other	102	0.4%	\$20.43	Short-term on-the-job training
Transportation, Storage, and Distribution Managers	98	0.4%	\$30.88	Work experience in a related occupation

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 44-45 Retail Trade

Occupation	Employed in Industry Group (2013)	% of the Total Jobs in Industry Group (2013)	Median Hourly Earnings	Education Level
Retail Salespersons	36,773	31.5%	\$11.29	Short-term on-the-job training
Cashiers	15,004	12.9%	\$9.88	Short-term on-the-job training
First-Line Supervisors of Retail Sales Workers	11,427	9.8%	\$15.92	Work experience in a related occupation
Stock Clerks and Order Fillers	9,651	8.3%	\$11.41	Short-term on-the-job training
Door-to-Door Sales Workers, News and Street Vendors, and Related Workers	4,474	3.8%	\$13.10	Short-term on-the-job training
Laborers and Freight, Stock, and Material Movers, Hand	2,111	1.8%	\$13.34	Short-term on-the-job training
Customer Service Representatives	1,858	1.6%	\$14.29	Short-term on-the-job training
Combined Food Preparation and Serving Workers, Including Fast Food	1,756	1.5%	\$9.46	Short-term on-the-job training
Office Clerks, General	1,592	1.4%	\$14.38	Short-term on-the-job training
Automotive Service Technicians and Mechanics	1,584	1.4%	\$16.39	Postsecondary non-degree award
Shipping, Receiving, and Traffic Clerks	1,539	1.3%	\$13.91	Short-term on-the-job training
Pharmacy Technicians	1,533	1.3%	\$16.04	Moderate-term on-the-job training
General and Operations Managers	1,318	1.1%	\$41.30	Bachelor's or higher degree, plus work experience
Light Truck or Delivery Services Drivers	1,214	1.0%	\$14.23	Short-term on-the-job training
Pharmacists	1,160	1.0%	\$56.29	First professional degree
Bookkeeping, Accounting, and Auditing Clerks	996	0.9%	\$16.24	Moderate-term on-the-job training
First-Line Supervisors of Office and Administrative Support Workers	939	0.8%	\$21.65	Work experience in a related occupation
Parts Salespersons	892	0.8%	\$13.82	Moderate-term on-the-job training
Packers and Packagers, Hand	886	0.8%	\$11.07	Short-term on-the-job training
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	769	0.7%	\$13.46	Short-term on-the-job training
Food Preparation Workers	714	0.6%	\$14.99	Short-term on-the-job training
Sales Managers	705	0.6%	\$37.61	Bachelor's or higher degree, plus work experience
Cleaners of Vehicles and Equipment	669	0.6%	\$9.91	Short-term on-the-job training
Butchers and Meat Cutters	595	0.5%	\$14.36	Long-term on-the-job training
Tire Repairers and Changers	566	0.5%	\$11.92	Moderate-term on-the-job training
Sales and Related Workers, All Other	520	0.4%	\$17.02	Moderate-term on-the-job training
Bakers	489	0.4%	\$13.51	Long-term on-the-job training
Order Clerks	486	0.4%	\$14.32	Short-term on-the-job training
Wholesale and Retail Buyers, Except Farm Products	448	0.4%	\$18.24	Long-term on-the-job training
Merchandise Displayers and Window Trimmers	394	0.3%	\$12.55	Moderate-term on-the-job training
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	386	0.3%	\$17.08	Short-term on-the-job training
Nonfarm Animal Caretakers	381	0.3%	\$8.50	Short-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	354	0.3%	\$23.87	Moderate-term on-the-job training
Sales Representatives, Services, All Other	353	0.3%	\$20.43	Short-term on-the-job training
Security Guards	334	0.3%	\$12.24	Short-term on-the-job training
Computer, Automated Teller, and Office Machine Repairers	322	0.3%	\$16.84	Postsecondary non-degree award
Automotive and Watercraft Service Attendants	316	0.3%	\$10.67	Short-term on-the-job training
Driver/Sales Workers	307	0.3%	\$13.31	Short-term on-the-job training
Floral Designers	295	0.3%	\$11.52	Short-term on-the-job training
Counter and Rental Clerks	256	0.2%	\$12.47	Short-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 444 Building Material and Garden Equipment and Supplies Dealers

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Retail Salespersons	1,804	39.1%	\$11.29	Short-term on-the-job training
Cashiers	488	10.6%	\$9.88	Short-term on-the-job training
First-Line Supervisors of Retail Sales Workers	450	9.7%	\$15.92	Work experience in a related occupation
Laborers and Freight, Stock, and Material Movers, Hand	249	5.4%	\$13.34	Short-term on-the-job training
Stock Clerks and Order Fillers	222	4.8%	\$11.41	Short-term on-the-job training
Light Truck or Delivery Services Drivers	146	3.2%	\$14.23	Short-term on-the-job training
Industrial Truck and Tractor Operators	108	2.3%	\$14.85	Short-term on-the-job training
Shipping, Receiving, and Traffic Clerks	105	2.3%	\$13.91	Short-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	99	2.1%	\$23.87	Moderate-term on-the-job training
Office Clerks, General	96	2.1%	\$14.38	Short-term on-the-job training
General and Operations Managers	80	1.7%	\$41.30	Bachelor's or higher degree, plus work experience
Bookkeeping, Accounting, and Auditing Clerks	64	1.4%	\$16.24	Moderate-term on-the-job training
Customer Service Representatives	43	0.9%	\$14.29	Short-term on-the-job training
First-Line Supervisors of Office and Administrative Support Workers	38	0.8%	\$21.65	Work experience in a related occupation
Heavy and Tractor-Trailer Truck Drivers	37	0.8%	\$19.64	Short-term on-the-job training
Sales Managers	27	0.6%	\$37.61	Bachelor's or higher degree, plus work experience
Wholesale and Retail Buyers, Except Farm Products	26	0.6%	\$18.24	Long-term on-the-job training
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	26	0.6%	\$17.08	Short-term on-the-job training
Glaziers	26	0.6%	\$20.04	Long-term on-the-job training
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	25	0.5%	\$13.46	Short-term on-the-job training
Landscaping and Groundskeeping Workers	23	0.5%	\$10.85	Short-term on-the-job training
Sales and Related Workers, All Other	23	0.5%	\$17.02	Moderate-term on-the-job training
Carpenters	22	0.5%	\$21.36	Long-term on-the-job training
Outdoor Power Equipment and Other Small Engine Mechanics	18	0.4%	\$15.61	Moderate-term on-the-job training
Parts Salespersons	18	0.4%	\$13.82	Moderate-term on-the-job training
Order Clerks	14	0.3%	\$14.32	Short-term on-the-job training
Cost Estimators	13	0.3%	\$28.08	Bachelor's degree
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	12	0.3%	\$25.51	Work experience in a related occupation
Business Operations Specialists, All Other	11	0.2%	\$31.08	Long-term on-the-job training
Installation, Maintenance, and Repair Workers, All Other	11	0.2%	\$18.53	Moderate-term on-the-job training
Counter and Rental Clerks	11	0.2%	\$12.47	Short-term on-the-job training
Driver/Sales Workers	<10	0.2%	--	Short-term on-the-job training
Interior Designers	<10	0.2%	--	Bachelor's degree
Maintenance and Repair Workers, General	<10	0.2%	--	Moderate-term on-the-job training
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	<10	0.2%	--	Postsecondary non-degree award
Accountants and Auditors	<10	0.2%	--	Bachelor's degree
Mechanical Door Repairers	<10	0.2%	--	Moderate-term on-the-job training
Assemblers and Fabricators, All Other	<10	0.2%	--	Moderate-term on-the-job training
First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	<10	0.2%	--	Work experience in a related occupation
Production, Planning, and Expediting Clerks	<10	0.2%	--	Moderate-term on-the-job training

Source: 2013 EMSI



III. Demand and Supply Analysis

Clark County NAICS 445 Food and Beverage Stores

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Cashiers	4,581	29.6%	\$9.88	Short-term on-the-job training
Stock Clerks and Order Fillers	2,853	18.4%	\$11.41	Short-term on-the-job training
First-Line Supervisors of Retail Sales Workers	1,179	7.6%	\$15.92	Work experience in a related occupation
Combined Food Preparation and Serving Workers, Including Fast Food	1,101	7.1%	\$9.46	Short-term on-the-job training
Packers and Packagers, Hand	646	4.2%	\$11.07	Short-term on-the-job training
Food Preparation Workers	609	3.9%	\$14.99	Short-term on-the-job training
Butchers and Meat Cutters	558	3.6%	\$14.36	Long-term on-the-job training
Retail Salespersons	554	3.6%	\$11.29	Short-term on-the-job training
Customer Service Representatives	343	2.2%	\$14.29	Short-term on-the-job training
Bakers	313	2.0%	\$13.51	Long-term on-the-job training
Laborers and Freight, Stock, and Material Movers, Hand	255	1.6%	\$13.34	Short-term on-the-job training
First-Line Supervisors of Office and Administrative Support Workers	189	1.2%	\$21.65	Work experience in a related occupation
General and Operations Managers	168	1.1%	\$41.30	Bachelor's or higher degree, plus work experience
First-Line Supervisors of Food Preparation and Serving Workers	148	1.0%	\$17.43	Work experience in a related occupation
Shipping, Receiving, and Traffic Clerks	144	0.9%	\$13.91	Short-term on-the-job training
Office Clerks, General	141	0.9%	\$14.38	Short-term on-the-job training
Meat, Poultry, and Fish Cutters and Trimmers	139	0.9%	\$10.15	Short-term on-the-job training
Pharmacists	131	0.8%	\$56.29	First professional degree
Pharmacy Technicians	127	0.8%	\$16.04	Moderate-term on-the-job training
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	126	0.8%	\$13.46	Short-term on-the-job training
Bookkeeping, Accounting, and Auditing Clerks	106	0.7%	\$16.24	Moderate-term on-the-job training
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	81	0.5%	\$10.71	Short-term on-the-job training
First-Line Supervisors of Production and Operating Workers	66	0.4%	\$22.88	Work experience in a related occupation
Light Truck or Delivery Services Drivers	44	0.3%	\$14.23	Short-term on-the-job training
Cooks, Short Order	42	0.3%	\$14.44	Short-term on-the-job training
Cooks, Fast Food	40	0.3%	\$9.71	Short-term on-the-job training
Sales Managers	39	0.3%	\$37.61	Bachelor's or higher degree, plus work experience
Security Guards	35	0.2%	\$12.24	Short-term on-the-job training
Dishwashers	34	0.2%	\$12.30	Short-term on-the-job training
Wholesale and Retail Buyers, Except Farm Products	34	0.2%	\$18.24	Long-term on-the-job training
Sales and Related Workers, All Other	34	0.2%	\$17.02	Moderate-term on-the-job training
Demonstrators and Product Promoters	32	0.2%	\$14.07	Short-term on-the-job training
Food Batchmakers	31	0.2%	\$18.90	Short-term on-the-job training
Maintenance and Repair Workers, General	27	0.2%	\$22.74	Moderate-term on-the-job training
Floral Designers	27	0.2%	\$11.52	Short-term on-the-job training
Driver/Sales Workers	26	0.2%	\$13.31	Short-term on-the-job training
Pharmacy Aides	23	0.1%	\$9.76	Short-term on-the-job training
Counter and Rental Clerks	22	0.1%	\$12.47	Short-term on-the-job training
Automotive and Watercraft Service Attendants	18	0.1%	\$10.67	Short-term on-the-job training
Office and Administrative Support Workers, All Other	17	0.1%	\$14.43	Short-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 48-49 Transportation and Warehousing

Occupation	Employed in Industry Group (2013)	% of the Total Jobs in Industry Group (2013)	Median Hourly Earnings	Education Level
Taxi Drivers and Chauffeurs	9,699	25.0%	\$13.86	Short-term on-the-job training
Heavy and Tractor-Trailer Truck Drivers	3,644	9.4%	\$19.64	Short-term on-the-job training
Laborers and Freight, Stock, and Material Movers, Hand	2,469	6.4%	\$13.34	Short-term on-the-job training
Flight Attendants	2,020	5.2%	\$19.74	Moderate-term on-the-job training
Bus Drivers, Transit and Intercity	1,646	4.2%	\$14.54	Moderate-term on-the-job training
Reservation and Transportation Ticket Agents and Travel Clerks	1,509	3.9%	\$15.94	Short-term on-the-job training
Light Truck or Delivery Services Drivers	1,470	3.8%	\$14.23	Short-term on-the-job training
Couriers and Messengers	1,181	3.0%	\$12.63	Short-term on-the-job training
Aircraft Mechanics and Service Technicians	880	2.3%	\$27.79	Postsecondary non-degree award
Airline Pilots, Copilots, and Flight Engineers	878	2.3%	\$60.46	Bachelor's degree
Dispatchers, Except Police, Fire, and Ambulance	833	2.1%	\$15.79	Moderate-term on-the-job training
Office Clerks, General	619	1.6%	\$14.38	Short-term on-the-job training
Stock Clerks and Order Fillers	512	1.3%	\$11.41	Short-term on-the-job training
Shipping, Receiving, and Traffic Clerks	511	1.3%	\$13.91	Short-term on-the-job training
Customer Service Representatives	500	1.3%	\$14.29	Short-term on-the-job training
Commercial Pilots	498	1.3%	\$35.47	Postsecondary non-degree award
Managers, All Other	486	1.3%	\$24.60	Work experience in a related occupation
Transportation Workers, All Other	469	1.2%	\$20.37	Short-term on-the-job training
Industrial Truck and Tractor Operators	408	1.1%	\$14.85	Short-term on-the-job training
Cargo and Freight Agents	400	1.0%	\$11.52	Short-term on-the-job training
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	395	1.0%	\$25.51	Work experience in a related occupation
General and Operations Managers	366	0.9%	\$41.30	Bachelor's or higher degree, plus work experience
Cleaners of Vehicles and Equipment	336	0.9%	\$9.91	Short-term on-the-job training
Sales Representatives, Services, All Other	335	0.9%	\$20.43	Short-term on-the-job training
First-Line Supervisors of Office and Administrative Support Workers	315	0.8%	\$21.65	Work experience in a related occupation
Transportation Attendants, Except Flight Attendants	303	0.8%	\$14.01	Short-term on-the-job training
Bus Drivers, School or Special Client	263	0.7%	\$20.11	Moderate-term on-the-job training
Bookkeeping, Accounting, and Auditing Clerks	257	0.7%	\$16.24	Moderate-term on-the-job training
Transportation, Storage, and Distribution Managers	251	0.6%	\$30.88	Work experience in a related occupation
Packers and Packagers, Hand	250	0.6%	\$11.07	Short-term on-the-job training
Baggage Porters and Bellhops	247	0.6%	\$12.90	Short-term on-the-job training
First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	222	0.6%	\$23.66	Work experience in a related occupation
Automotive Service Technicians and Mechanics	214	0.6%	\$16.39	Postsecondary non-degree award
Bus and Truck Mechanics and Diesel Engine Specialists	214	0.6%	\$23.54	Postsecondary non-degree award
Maintenance and Repair Workers, General	204	0.5%	\$22.74	Moderate-term on-the-job training
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	185	0.5%	\$17.08	Short-term on-the-job training
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	150	0.4%	\$13.46	Short-term on-the-job training
First-Line Supervisors of Mechanics, Installers, and Repairers	129	0.3%	\$31.01	Work experience in a related occupation
Driver/Sales Workers	98	0.3%	\$13.31	Short-term on-the-job training
Business Operations Specialists, All Other	96	0.2%	\$31.08	Long-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 484 Truck Transportation

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Heavy and Tractor-Trailer Truck Drivers	3,021	61.3%	\$19.64	Short-term on-the-job training
Laborers and Freight, Stock, and Material Movers, Hand	357	7.3%	\$13.34	Short-term on-the-job training
Light Truck or Delivery Services Drivers	315	6.4%	\$14.23	Short-term on-the-job training
Office Clerks, General	120	2.4%	\$14.38	Short-term on-the-job training
Dispatchers, Except Police, Fire, and Ambulance	101	2.0%	\$15.79	Moderate-term on-the-job training
Bus and Truck Mechanics and Diesel Engine Specialists	88	1.8%	\$23.54	Postsecondary non-degree award
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	83	1.7%	\$25.51	Work experience in a related occupation
Sales Representatives, Services, All Other	57	1.2%	\$20.43	Short-term on-the-job training
General and Operations Managers	55	1.1%	\$41.30	Bachelor's or higher degree, plus work experience
Bookkeeping, Accounting, and Auditing Clerks	51	1.0%	\$16.24	Moderate-term on-the-job training
Transportation, Storage, and Distribution Managers	47	0.9%	\$30.88	Work experience in a related occupation
Industrial Truck and Tractor Operators	43	0.9%	\$14.85	Short-term on-the-job training
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	43	0.9%	\$17.08	Short-term on-the-job training
Driver/Sales Workers	42	0.8%	\$13.31	Short-term on-the-job training
Customer Service Representatives	41	0.8%	\$14.29	Short-term on-the-job training
Cargo and Freight Agents	36	0.7%	\$11.52	Short-term on-the-job training
Managers, All Other	30	0.6%	\$24.60	Work experience in a related occupation
First-Line Supervisors of Office and Administrative Support Workers	23	0.5%	\$21.65	Work experience in a related occupation
Shipping, Receiving, and Traffic Clerks	21	0.4%	\$13.91	Short-term on-the-job training
Billing and Posting Clerks	21	0.4%	\$17.60	Short-term on-the-job training
First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	20	0.4%	\$23.66	Work experience in a related occupation
Packers and Packers, Hand	19	0.4%	\$11.07	Short-term on-the-job training
Cleaners of Vehicles and Equipment	17	0.3%	\$9.91	Short-term on-the-job training
Maintenance and Repair Workers, General	15	0.3%	\$22.74	Moderate-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	11	0.2%	--	Moderate-term on-the-job training
First-Line Supervisors of Mechanics, Installers, and Repairers	<10	0.2%	--	Work experience in a related occupation
Accountants and Auditors	<10	0.2%	--	Bachelor's degree
Bill and Account Collectors	<10	0.2%	--	Moderate-term on-the-job training
Stock Clerks and Order Fillers	<10	0.2%	--	Short-term on-the-job training
Automotive Service Technicians and Mechanics	<10	0.2%	--	Postsecondary non-degree award
Chief Executives	<10	0.2%	--	Bachelor's or higher degree, plus work experience
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	<10	0.2%	--	Short-term on-the-job training
Payroll and Timekeeping Clerks	<10	0.2%	--	Moderate-term on-the-job training
Couriers and Messengers	<10	0.1%	--	Short-term on-the-job training
Sales Managers	<10	0.1%	--	Bachelor's or higher degree, plus work experience
Taxi Drivers and Chauffeurs	<10	0.1%	--	Short-term on-the-job training
Installation, Maintenance, and Repair Workers, All Other	<10	0.1%	--	Moderate-term on-the-job training
Helpers--Installation, Maintenance, and Repair Workers	<10	0.1%	--	Moderate-term on-the-job training
Human Resources Specialists	<10	0.1%	--	Bachelor's degree
Receptionists and Information Clerks	<10	0.1%	--	Short-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 493 Warehousing and Storage

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Laborers and Freight, Stock, and Material Movers, Hand	1,114	26.2%	\$13.34	Short-term on-the-job training
Stock Clerks and Order Fillers	415	9.8%	\$11.41	Short-term on-the-job training
Industrial Truck and Tractor Operators	331	7.8%	\$14.85	Short-term on-the-job training
Shipping, Receiving, and Traffic Clerks	265	6.2%	\$13.91	Short-term on-the-job training
Packers and Packagers, Hand	218	5.1%	\$11.07	Short-term on-the-job training
Managers, All Other	150	3.5%	\$24.60	Work experience in a related occupation
Heavy and Tractor-Trailer Truck Drivers	139	3.3%	\$19.64	Short-term on-the-job training
First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	112	2.6%	\$23.66	Work experience in a related occupation
Light Truck or Delivery Services Drivers	106	2.5%	\$14.23	Short-term on-the-job training
Transportation, Storage, and Distribution Managers	106	2.5%	\$30.88	Work experience in a related occupation
Office Clerks, General	89	2.1%	\$14.38	Short-term on-the-job training
Maintenance and Repair Workers, General	76	1.8%	\$22.74	Moderate-term on-the-job training
Customer Service Representatives	74	1.7%	\$14.29	Short-term on-the-job training
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	63	1.5%	\$13.46	Short-term on-the-job training
First-Line Supervisors of Office and Administrative Support Workers	57	1.3%	\$21.65	Work experience in a related occupation
General and Operations Managers	56	1.3%	\$41.30	Bachelor's or higher degree, plus work experience
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	51	1.2%	\$25.51	Work experience in a related occupation
Machine Feeders and Offbearers	49	1.1%	\$12.39	Short-term on-the-job training
Sales Representatives, Services, All Other	38	0.9%	\$20.43	Short-term on-the-job training
Bookkeeping, Accounting, and Auditing Clerks	34	0.8%	\$16.24	Moderate-term on-the-job training
Team Assemblers	30	0.7%	\$12.47	Moderate-term on-the-job training
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	29	0.7%	\$17.08	Short-term on-the-job training
Inspectors, Testers, Sorters, Samplers, and Weighers	28	0.7%	\$15.79	Moderate-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	27	0.6%	\$23.87	Moderate-term on-the-job training
Business Operations Specialists, All Other	26	0.6%	\$31.08	Long-term on-the-job training
Production, Planning, and Expediting Clerks	22	0.5%	\$21.09	Moderate-term on-the-job training
Protective Service Workers, All Other	21	0.5%	\$18.89	Short-term on-the-job training
Security Guards	21	0.5%	\$12.24	Short-term on-the-job training
Helpers--Production Workers	20	0.5%	\$11.43	Short-term on-the-job training
Cargo and Freight Agents	17	0.4%	\$11.52	Short-term on-the-job training
Driver/Sales Workers	17	0.4%	\$13.31	Short-term on-the-job training
Accountants and Auditors	16	0.4%	\$26.44	Bachelor's degree
Order Clerks	16	0.4%	\$14.32	Short-term on-the-job training
Packaging and Filling Machine Operators and Tenders	16	0.4%	\$12.21	Moderate-term on-the-job training
Retail Salespersons	15	0.3%	--	Short-term on-the-job training
Weighers, Measurers, Checkers, and Samplers, Recordkeeping	14	0.3%	\$11.88	Short-term on-the-job training
Conveyor Operators and Tenders	14	0.3%	--	Short-term on-the-job training
Cleaners of Vehicles and Equipment	12	0.3%	\$9.91	Short-term on-the-job training
Dispatchers, Except Police, Fire, and Ambulance	11	0.3%	--	Moderate-term on-the-job training
First-Line Supervisors of Production and Operating Workers	11	0.3%	--	Work experience in a related occupation

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 517 Telecommunications

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Unclassified Occupation	1,545	32.6%	\$19.76	N/A
Telecommunications Equipment Installers and Repairers, Except Line Installers	462	9.7%	\$29.01	Postsecondary non-degree award
Sales Representatives, Services, All Other	433	9.1%	\$20.43	Short-term on-the-job training
Telecommunications Line Installers and Repairers	401	8.4%	\$25.75	Long-term on-the-job training
Customer Service Representatives	324	6.8%	\$14.29	Short-term on-the-job training
Electronics Engineers, Except Computer	155	3.3%	\$41.35	Bachelor's degree
Business Operations Specialists, All Other	85	1.8%	\$31.08	Long-term on-the-job training
Retail Salespersons	71	1.5%	\$11.29	Short-term on-the-job training
Computer Network Support Specialists	70	1.5%	\$23.90	Associate's degree
Office Clerks, General	55	1.2%	\$14.38	Short-term on-the-job training
Network and Computer Systems Administrators	55	1.2%	\$32.83	Bachelor's degree
First-Line Supervisors of Office and Administrative Support Workers	45	0.9%	\$21.65	Work experience in a related occupation
First-Line Supervisors of Mechanics, Installers, and Repairers	43	0.9%	\$31.01	Work experience in a related occupation
Electrical and Electronics Engineering Technicians	39	0.8%	\$32.49	Associate's degree
General and Operations Managers	39	0.8%	\$41.30	Bachelor's or higher degree, plus work experience
Computer User Support Specialists	38	0.8%	\$20.48	Associate's degree
Computer Network Architects	32	0.7%	\$37.32	Bachelor's degree
Radio, Cellular, and Tower Equipment Installers and Repairs	31	0.6%	\$22.09	Associate's degree
Bookkeeping, Accounting, and Auditing Clerks	29	0.6%	\$16.24	Moderate-term on-the-job training
Accountants and Auditors	27	0.6%	\$26.44	Bachelor's degree
Software Developers, Applications	26	0.6%	\$37.96	Bachelor's degree
Sales Managers	26	0.6%	\$37.61	Bachelor's or higher degree, plus work experience
Production, Planning, and Expediting Clerks	23	0.5%	\$21.09	Moderate-term on-the-job training
Computer Occupations, All Other	23	0.5%	\$29.66	Bachelor's degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	23	0.5%	\$17.08	Short-term on-the-job training
Computer and Information Systems Managers	22	0.5%	\$46.75	Bachelor's or higher degree, plus work experience
Software Developers, Systems Software	20	0.4%	\$38.75	Bachelor's degree
First-Line Supervisors of Non-Retail Sales Workers	20	0.4%	\$14.51	Work experience in a related occupation
Managers, All Other	20	0.4%	\$24.60	Work experience in a related occupation
Management Analysts	20	0.4%	\$31.65	Bachelor's or higher degree, plus work experience
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	19	0.4%	\$13.46	Short-term on-the-job training
Bill and Account Collectors	19	0.4%	\$15.85	Moderate-term on-the-job training
Dispatchers, Except Police, Fire, and Ambulance	18	0.4%	\$15.79	Moderate-term on-the-job training
Market Research Analysts and Marketing Specialists	17	0.4%	\$26.00	Bachelor's degree
Computer Systems Analysts	17	0.3%	\$31.75	Bachelor's degree
Office and Administrative Support Workers, All Other	16	0.3%	\$14.43	Short-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	16	0.3%	\$23.87	Moderate-term on-the-job training
Telemarketers	15	0.3%	\$12.51	Short-term on-the-job training
Stock Clerks and Order Fillers	15	0.3%	\$11.41	Short-term on-the-job training
Telephone Operators	14	0.3%	\$14.87	Short-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 518 Data Processing, Hosting and Related Services

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Data Entry Keyers	146	12.5%	\$15.72	Moderate-term on-the-job training
Computer Operators	68	5.8%	\$19.61	Moderate-term on-the-job training
Customer Service Representatives	64	5.5%	\$14.29	Short-term on-the-job training
Sales Representatives, Services, All Other	53	4.6%	\$20.43	Short-term on-the-job training
Computer Systems Analysts	53	4.5%	\$31.75	Bachelor's degree
Web Developers	44	3.8%	\$19.35	Bachelor's degree
Computer User Support Specialists	44	3.8%	\$20.48	Associate's degree
Software Developers, Applications	42	3.6%	\$37.96	Bachelor's degree
Computer Programmers	41	3.5%	\$30.87	Bachelor's degree
Computer and Information Systems Managers	37	3.2%	\$46.75	Bachelor's or higher degree, plus work experience
Network and Computer Systems Administrators	34	2.9%	\$32.83	Bachelor's degree
Office Clerks, General	32	2.7%	--	Short-term on-the-job training
Computer Network Support Specialists	24	2.0%	--	Associate's degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	23	1.9%	--	Short-term on-the-job training
General and Operations Managers	21	1.8%	\$41.30	Bachelor's or higher degree, plus work experience
First-Line Supervisors of Office and Administrative Support Workers	19	1.7%	--	Work experience in a related occupation
Office Machine Operators, Except Computer	18	1.5%	--	Short-term on-the-job training
Computer Occupations, All Other	17	1.5%	--	Bachelor's degree
Database Administrators	17	1.5%	--	Bachelor's degree
Chief Executives	17	1.5%	--	Bachelor's or higher degree, plus work experience
Bookkeeping, Accounting, and Auditing Clerks	17	1.5%	--	Moderate-term on-the-job training
First-Line Supervisors of Non-Retail Sales Workers	15	1.3%	\$14.51	Work experience in a related occupation
Managers, All Other	14	1.2%	\$24.60	Work experience in a related occupation
Market Research Analysts and Marketing Specialists	13	1.1%	--	Bachelor's degree
Executive Secretaries and Executive Administrative Assistants	13	1.1%	--	Work experience in a related occupation
Business Operations Specialists, All Other	12	1.0%	--	Long-term on-the-job training
Software Developers, Systems Software	12	1.0%	--	Bachelor's degree
Management Analysts	12	1.0%	--	Bachelor's or higher degree, plus work experience
Computer Network Architects	11	1.0%	\$37.32	Bachelor's degree
Accountants and Auditors	11	0.9%	--	Bachelor's degree
Sales Managers	<10	0.8%	--	Bachelor's or higher degree, plus work experience
Financial Managers	<10	0.8%	--	Bachelor's or higher degree, plus work experience
Mail Clerks and Mail Machine Operators, Except Postal Service	<10	0.8%	--	Short-term on-the-job training
Human Resources Specialists	<10	0.7%	--	Bachelor's degree
Word Processors and Typists	<10	0.6%	--	Short-term on-the-job training
Office and Administrative Support Workers, All Other	<10	0.6%	--	Short-term on-the-job training
Marketing Managers	<10	0.6%	--	Bachelor's or higher degree, plus work experience
Production, Planning, and Expediting Clerks	<10	0.5%	--	Moderate-term on-the-job training
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	<10	0.5%	--	Moderate-term on-the-job training
Order Clerks	<10	0.5%	--	Short-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 62 Health Care and Social Assistance

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Registered Nurses	9,328	11.3%	\$38.08	Associate's degree
Personal Care Aides	6,565	8.0%	\$9.87	Short-term on-the-job training
Childcare Workers	5,111	6.2%	\$6.16	Short-term on-the-job training
Medical Assistants	3,423	4.2%	\$14.83	Moderate-term on-the-job training
Home Health Aides	3,078	3.7%	\$11.71	Short-term on-the-job training
Nursing Assistants	2,903	3.5%	\$15.31	Postsecondary non-degree award
Receptionists and Information Clerks	2,125	2.6%	\$13.20	Short-term on-the-job training
Dental Assistants	2,089	2.5%	\$17.64	Postsecondary non-degree award
Office Clerks, General	1,957	2.4%	\$14.38	Short-term on-the-job training
Medical Secretaries	1,679	2.0%	\$17.30	Moderate-term on-the-job training
Licensed Practical and Licensed Vocational Nurses	1,355	1.6%	\$25.52	Postsecondary non-degree award
Dentists, General	1,334	1.6%	\$47.39	First professional degree
Physicians and Surgeons, All Other	1,216	1.5%	\$104.20	First professional degree
Clinical, Counseling, and School Psychologists	1,071	1.3%	\$35.31	Doctoral degree
Medical and Health Services Managers	1,029	1.3%	\$44.28	Bachelor's degree
Interviewers, Except Eligibility and Loan	973	1.2%	\$11.08	Short-term on-the-job training
Preschool Teachers, Except Special Education	939	1.1%	\$9.82	Associate's degree
Medical Records and Health Information Technicians	919	1.1%	\$16.66	Postsecondary non-degree award
Family and General Practitioners	900	1.1%	\$79.13	First professional degree
Maids and Housekeeping Cleaners	898	1.1%	\$12.95	Short-term on-the-job training
Radiologic Technologists	874	1.1%	\$29.32	Associate's degree
Billing and Posting Clerks	866	1.1%	\$17.60	Short-term on-the-job training
Dental Hygienists	843	1.0%	\$43.87	Associate's degree
First-Line Supervisors of Office and Administrative Support Workers	828	1.0%	\$21.65	Work experience in a related occupation
Physical Therapists	818	1.0%	\$49.25	First professional degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	764	0.9%	\$17.08	Short-term on-the-job training
Medical and Clinical Laboratory Technologists	713	0.9%	\$32.24	Bachelor's degree
Physician Assistants	678	0.8%	\$49.23	Master's degree
Child, Family, and School Social Workers	671	0.8%	\$22.58	Bachelor's degree
Healthcare Support Workers, All Other	638	0.8%	\$19.80	Short-term on-the-job training
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	636	0.8%	\$13.46	Short-term on-the-job training
Phlebotomists	608	0.7%	\$16.29	Short-term on-the-job training
Medical and Clinical Laboratory Technicians	592	0.7%	\$18.64	Associate's degree
Surgical Technologists	584	0.7%	\$26.90	Postsecondary non-degree award
Social and Human Service Assistants	551	0.7%	\$13.03	Short-term on-the-job training
Emergency Medical Technicians and Paramedics	524	0.6%	\$15.34	Postsecondary non-degree award
Respiratory Therapists	523	0.6%	\$34.10	Associate's degree
Occupational Therapists	504	0.6%	\$49.10	Master's degree
General and Operations Managers	494	0.6%	\$41.30	Bachelor's or higher degree, plus work experience
Bookkeeping, Accounting, and Auditing Clerks	492	0.6%	\$16.24	Moderate-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 623 Nursing and Residential Care Facilities

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Nursing Assistants	1,555	19.7%	\$15.31	Postsecondary non-degree award
Personal Care Aides	707	8.9%	\$9.87	Short-term on-the-job training
Registered Nurses	659	8.3%	\$38.08	Associate's degree
Licensed Practical and Licensed Vocational Nurses	486	6.2%	\$25.52	Postsecondary non-degree award
Home Health Aides	484	6.1%	\$11.71	Short-term on-the-job training
Maids and Housekeeping Cleaners	408	5.2%	\$12.95	Short-term on-the-job training
Recreation Workers	171	2.2%	\$13.04	Bachelor's degree
Childcare Workers	132	1.7%	\$6.16	Short-term on-the-job training
Food Servers, Nonrestaurant	131	1.7%	\$12.17	Short-term on-the-job training
Maintenance and Repair Workers, General	121	1.5%	\$22.74	Moderate-term on-the-job training
Food Preparation Workers	115	1.5%	\$14.99	Short-term on-the-job training
Medical and Health Services Managers	107	1.4%	\$44.28	Bachelor's degree
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	107	1.4%	\$13.46	Short-term on-the-job training
Combined Food Preparation and Serving Workers, Including Fast Food	101	1.3%	\$9.46	Short-term on-the-job training
Cooks, Institution and Cafeteria	97	1.2%	\$12.87	Short-term on-the-job training
Office Clerks, General	97	1.2%	\$14.38	Short-term on-the-job training
Managers, All Other	91	1.2%	\$24.60	Work experience in a related occupation
Laundry and Dry-Cleaning Workers	88	1.1%	\$10.55	Short-term on-the-job training
Receptionists and Information Clerks	86	1.1%	\$13.20	Short-term on-the-job training
Social and Human Service Assistants	86	1.1%	\$13.03	Short-term on-the-job training
Medical Records and Health Information Technicians	79	1.0%	\$16.66	Postsecondary non-degree award
Dishwashers	74	0.9%	\$12.30	Short-term on-the-job training
Taxi Drivers and Chauffeurs	71	0.9%	\$13.86	Short-term on-the-job training
Child, Family, and School Social Workers	68	0.9%	\$22.58	Bachelor's degree
General and Operations Managers	67	0.9%	\$41.30	Bachelor's or higher degree, plus work experience
Healthcare Social Workers	60	0.8%	\$28.54	Master's degree
First-Line Supervisors of Food Preparation and Serving Workers	59	0.8%	\$17.43	Work experience in a related occupation
Psychiatric Aides	57	0.7%	\$14.20	Short-term on-the-job training
Healthcare Support Workers, All Other	55	0.7%	\$19.80	Short-term on-the-job training
First-Line Supervisors of Personal Service Workers	54	0.7%	\$14.97	Work experience in a related occupation
Occupational Therapists	48	0.6%	\$49.10	Master's degree
Medical Assistants	46	0.6%	\$14.83	Moderate-term on-the-job training
Waiters and Waitresses	46	0.6%	\$10.79	Short-term on-the-job training
Physical Therapists	46	0.6%	\$49.25	First professional degree
Mental Health Counselors	45	0.6%	\$22.50	Master's degree
Security Guards	45	0.6%	\$12.24	Short-term on-the-job training
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	44	0.6%	\$17.08	Short-term on-the-job training
Hairdressers, Hairstylists, and Cosmetologists	43	0.5%	\$9.98	Postsecondary non-degree award
Dining Room and Cafeteria Attendants and Bartender Helpers	43	0.5%	\$12.79	Short-term on-the-job training
Social and Community Service Managers	42	0.5%	\$29.52	Bachelor's degree

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 6211 Offices of Physicians

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Medical Assistants	2,332	17.2%	\$14.83	Moderate-term on-the-job training
Registered Nurses	1,097	8.1%	\$38.08	Associate's degree
Receptionists and Information Clerks	943	7.0%	\$13.20	Short-term on-the-job training
Physicians and Surgeons, All Other	923	6.8%	\$104.20	First professional degree
Family and General Practitioners	761	5.6%	\$79.13	First professional degree
Medical Secretaries	704	5.2%	\$17.30	Moderate-term on-the-job training
Office Clerks, General	487	3.6%	\$14.38	Short-term on-the-job training
Physician Assistants	485	3.6%	\$49.23	Master's degree
Billing and Posting Clerks	426	3.1%	\$17.60	Short-term on-the-job training
Medical Records and Health Information Technicians	336	2.5%	\$16.66	Postsecondary non-degree award
First-Line Supervisors of Office and Administrative Support Workers	308	2.3%	\$21.65	Work experience in a related occupation
Licensed Practical and Licensed Vocational Nurses	286	2.1%	\$25.52	Postsecondary non-degree award
Internists, General	265	2.0%	\$92.99	First professional degree
Radiologic Technologists	253	1.9%	\$29.32	Associate's degree
Surgeons	252	1.9%	\$93.85	First professional degree
Obstetricians and Gynecologists	217	1.6%	\$104.26	First professional degree
Medical and Health Services Managers	173	1.3%	\$44.28	Bachelor's degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	157	1.2%	\$17.08	Short-term on-the-job training
Nurse Practitioners	155	1.1%	\$44.99	Associate's degree
Bill and Account Collectors	146	1.1%	\$15.85	Moderate-term on-the-job training
Anesthesiologists	133	1.0%	\$102.20	First professional degree
Pediatricians, General	126	0.9%	\$63.33	First professional degree
Bookkeeping, Accounting, and Auditing Clerks	117	0.9%	\$16.24	Moderate-term on-the-job training
Interviewers, Except Eligibility and Loan	117	0.9%	\$11.08	Short-term on-the-job training
File Clerks	102	0.8%	\$14.25	Short-term on-the-job training
Surgical Technologists	101	0.7%	\$26.90	Postsecondary non-degree award
Medical and Clinical Laboratory Technicians	85	0.6%	\$18.64	Associate's degree
Medical and Clinical Laboratory Technologists	71	0.5%	\$32.24	Bachelor's degree
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	68	0.5%	\$13.46	Short-term on-the-job training
Customer Service Representatives	68	0.5%	\$14.29	Short-term on-the-job training
Ophthalmic Medical Technicians	66	0.5%	\$12.61	Postsecondary non-degree award
General and Operations Managers	66	0.5%	\$41.30	Bachelor's or higher degree, plus work experience
Cardiovascular Technologists and Technicians	61	0.5%	\$27.26	Associate's degree
Medical Transcriptionists	61	0.4%	\$15.71	Postsecondary non-degree award
Healthcare Support Workers, All Other	60	0.4%	\$19.80	Short-term on-the-job training
Nurse Anesthetists	55	0.4%	\$95.46	Associate's degree
Nursing Assistants	53	0.4%	\$15.31	Postsecondary non-degree award
Switchboard Operators, Including Answering Service	51	0.4%	\$15.22	Short-term on-the-job training
Diagnostic Medical Sonographers	51	0.4%	\$34.85	Associate's degree
Phlebotomists	49	0.4%	\$16.29	Short-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 6212 Offices of Dentists

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Dental Assistants	2,023	34.7%	\$17.64	Postsecondary non-degree award
Dentists, General	1,278	21.9%	\$47.39	First professional degree
Dental Hygienists	826	14.2%	\$43.87	Associate's degree
Receptionists and Information Clerks	407	7.0%	\$13.20	Short-term on-the-job training
Medical Secretaries	333	5.7%	\$17.30	Moderate-term on-the-job training
Office Clerks, General	228	3.9%	\$14.38	Short-term on-the-job training
First-Line Supervisors of Office and Administrative Support Workers	113	1.9%	\$21.65	Work experience in a related occupation
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	82	1.4%	\$17.08	Short-term on-the-job training
Bookkeeping, Accounting, and Auditing Clerks	58	1.0%	\$16.24	Moderate-term on-the-job training
Billing and Posting Clerks	51	0.9%	\$17.60	Short-term on-the-job training
Surgical Technologists	42	0.7%	\$26.90	Postsecondary non-degree award
Orthodontists	37	0.6%	\$72.62	First professional degree
Oral and Maxillofacial Surgeons	35	0.6%	\$74.06	First professional degree
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	30	0.5%	\$13.46	Short-term on-the-job training
Medical Assistants	29	0.5%	\$14.83	Moderate-term on-the-job training
Dental Laboratory Technicians	23	0.4%	\$18.12	Moderate-term on-the-job training
Executive Secretaries and Executive Administrative Assistants	17	0.3%	\$23.98	Work experience in a related occupation
Medical and Health Services Managers	16	0.3%	\$44.28	Bachelor's degree
Dentists, All Other Specialists	15	0.3%	\$52.28	First professional degree
Bill and Account Collectors	13	0.2%	\$15.85	Moderate-term on-the-job training
Registered Nurses	11	0.2%	--	Associate's degree
Medical Equipment Preparers	11	0.2%	--	Moderate-term on-the-job training
File Clerks	<10	0.2%	--	Short-term on-the-job training
Healthcare Support Workers, All Other	<10	0.2%	--	Short-term on-the-job training
General and Operations Managers	<10	0.1%	--	Bachelor's or higher degree, plus work experience
Customer Service Representatives	<10	0.1%	--	Short-term on-the-job training
Interviewers, Except Eligibility and Loan	<10	0.1%	--	Short-term on-the-job training
Office and Administrative Support Workers, All Other	<10	0.1%	--	Short-term on-the-job training
Physician Assistants	<10	0.1%	--	Master's degree
Prosthodontists	<10	0.1%	--	First professional degree
Accountants and Auditors	<10	0.1%	--	Bachelor's degree
Medical Records and Health Information Technicians	<10	0.1%	--	Postsecondary non-degree award
Business Operations Specialists, All Other	<10	0.1%	--	Long-term on-the-job training
Sales Representatives, Services, All Other	<10	0.1%	--	Short-term on-the-job training
Radiologic Technologists	<10	0.1%	--	Associate's degree
Maintenance and Repair Workers, General	<10	0.1%	--	Moderate-term on-the-job training
Maids and Housekeeping Cleaners	<10	0.1%	--	Short-term on-the-job training
Couriers and Messengers	<10	0.1%	--	Short-term on-the-job training
Medical and Clinical Laboratory Technicians	<10	0.0%	--	Associate's degree
Payroll and Timekeeping Clerks	<10	0.0%	--	Moderate-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 6213 Offices of Other Health Practitioners

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Clinical, Counseling, and School Psychologists	963	15.4%	\$35.31	Doctoral degree
Medical Assistants	421	6.8%	\$14.83	Moderate-term on-the-job training
Chiropractors	357	5.7%	\$27.92	First professional degree
Physical Therapists	352	5.6%	\$49.25	First professional degree
Receptionists and Information Clerks	287	4.6%	\$13.20	Short-term on-the-job training
Health Diagnosing and Treating Practitioners, All Other	287	4.6%	\$29.45	Master's degree
Office Clerks, General	225	3.6%	\$14.38	Short-term on-the-job training
Speech-Language Pathologists	223	3.6%	\$35.47	Master's degree
Medical Secretaries	181	2.9%	\$17.30	Moderate-term on-the-job training
Psychologists, All Other	180	2.9%	\$43.95	Master's degree
Occupational Therapists	179	2.9%	\$49.10	Master's degree
Massage Therapists	167	2.7%	\$10.66	Postsecondary non-degree award
Therapists, All Other	166	2.7%	\$32.23	Master's degree
Physical Therapist Assistants	141	2.3%	\$28.16	Associate's degree
Optometrists	139	2.2%	\$44.94	First professional degree
Opticians, Dispensing	134	2.2%	\$21.16	Long-term on-the-job training
Physical Therapist Aides	132	2.1%	\$14.85	Moderate-term on-the-job training
Dietitians and Nutritionists	101	1.6%	\$33.16	Bachelor's degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	97	1.6%	\$17.08	Short-term on-the-job training
Billing and Posting Clerks	82	1.3%	\$17.60	Short-term on-the-job training
Mental Health Counselors	74	1.2%	\$22.50	Master's degree
First-Line Supervisors of Office and Administrative Support Workers	71	1.1%	\$21.65	Work experience in a related occupation
Occupational Therapy Assistants	69	1.1%	\$31.70	Associate's degree
Medical and Health Services Managers	67	1.1%	\$44.28	Bachelor's degree
Podiatrists	66	1.1%	\$45.46	First professional degree
Registered Nurses	63	1.0%	\$38.08	Associate's degree
Healthcare Support Workers, All Other	61	1.0%	\$19.80	Short-term on-the-job training
Bookkeeping, Accounting, and Auditing Clerks	52	0.8%	\$16.24	Moderate-term on-the-job training
Mental Health and Substance Abuse Social Workers	46	0.7%	\$23.49	Master's degree
Occupational Therapy Aides	27	0.4%	\$12.53	Short-term on-the-job training
Healthcare Practitioners and Technical Workers, All Other	27	0.4%	\$22.67	Bachelor's degree
Health Technologists and Technicians, All Other	26	0.4%	\$25.09	Postsecondary non-degree award
Child, Family, and School Social Workers	25	0.4%	--	Bachelor's degree
General and Operations Managers	25	0.4%	\$41.30	Bachelor's or higher degree, plus work experience
Fitness Trainers and Aerobics Instructors	22	0.4%	\$13.68	Postsecondary non-degree award
Ophthalmic Medical Technicians	21	0.3%	\$12.61	Postsecondary non-degree award
Athletic Trainers	21	0.3%	\$18.73	Bachelor's degree
Ophthalmic Laboratory Technicians	20	0.3%	\$14.63	Moderate-term on-the-job training
Physicians and Surgeons, All Other	20	0.3%	\$104.20	First professional degree
Substance Abuse and Behavioral Disorder Counselors	20	0.3%	--	Bachelor's degree

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 6214 Outpatient Care Centers

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Registered Nurses	613	20.4%	\$38.08	Associate's degree
Medical Assistants	244	8.1%	\$14.83	Moderate-term on-the-job training
Health Technologists and Technicians, All Other	106	3.5%	\$25.09	Postsecondary non-degree award
Receptionists and Information Clerks	87	2.9%	\$13.20	Short-term on-the-job training
Surgical Technologists	83	2.8%	\$26.90	Postsecondary non-degree award
Medical and Health Services Managers	81	2.7%	\$44.28	Bachelor's degree
Office Clerks, General	74	2.5%	\$14.38	Short-term on-the-job training
Medical Secretaries	70	2.3%	\$17.30	Moderate-term on-the-job training
Licensed Practical and Licensed Vocational Nurses	65	2.2%	\$25.52	Postsecondary non-degree award
Physician Assistants	61	2.0%	\$49.23	Master's degree
Medical Records and Health Information Technicians	57	1.9%	\$16.66	Postsecondary non-degree award
Interviewers, Except Eligibility and Loan	55	1.8%	\$11.08	Short-term on-the-job training
Nursing Assistants	50	1.7%	\$15.31	Postsecondary non-degree award
Radiologic Technologists	49	1.6%	\$29.32	Associate's degree
Family and General Practitioners	44	1.5%	\$79.13	First professional degree
Billing and Posting Clerks	41	1.3%	\$17.60	Short-term on-the-job training
Physical Therapists	41	1.3%	\$49.25	First professional degree
Customer Service Representatives	40	1.3%	\$14.29	Short-term on-the-job training
Physicians and Surgeons, All Other	40	1.3%	\$104.20	First professional degree
First-Line Supervisors of Office and Administrative Support Workers	39	1.3%	\$21.65	Work experience in a related occupation
Mental Health Counselors	38	1.3%	\$22.50	Master's degree
Medical and Clinical Laboratory Technicians	35	1.2%	\$18.64	Associate's degree
Healthcare Support Workers, All Other	32	1.1%	\$19.80	Short-term on-the-job training
Healthcare Social Workers	31	1.0%	\$28.54	Master's degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	30	1.0%	\$17.08	Short-term on-the-job training
Substance Abuse and Behavioral Disorder Counselors	26	0.9%	\$20.61	Bachelor's degree
Mental Health and Substance Abuse Social Workers	25	0.8%	\$23.49	Master's degree
General and Operations Managers	25	0.8%	\$41.30	Bachelor's or higher degree, plus work experience
Bill and Account Collectors	24	0.8%	\$15.85	Moderate-term on-the-job training
Nurse Practitioners	23	0.8%	\$44.99	Associate's degree
Social and Human Service Assistants	23	0.8%	\$13.03	Short-term on-the-job training
Personal Care Aides	21	0.7%	\$9.87	Short-term on-the-job training
Occupational Therapists	21	0.7%	\$49.10	Master's degree
Bookkeeping, Accounting, and Auditing Clerks	19	0.6%	\$16.24	Moderate-term on-the-job training
Pharmacists	19	0.6%	\$56.29	First professional degree
Child, Family, and School Social Workers	18	0.6%	\$22.58	Bachelor's degree
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	18	0.6%	\$13.46	Short-term on-the-job training
Dietitians and Nutritionists	18	0.6%	\$33.16	Bachelor's degree
Pharmacy Technicians	18	0.6%	\$16.04	Moderate-term on-the-job training
Medical and Clinical Laboratory Technologists	17	0.6%	\$32.24	Bachelor's degree

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 6215 Medical and Diagnostic Laboratories

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Phlebotomists	322	11.9%	\$16.29	Short-term on-the-job training
Medical and Clinical Laboratory Technologists	310	11.4%	\$32.24	Bachelor's degree
Medical and Clinical Laboratory Technicians	266	9.8%	\$18.64	Associate's degree
Radiologic Technologists	174	6.4%	\$29.32	Associate's degree
Couriers and Messengers	157	5.8%	\$12.63	Short-term on-the-job training
Magnetic Resonance Imaging Technologists	124	4.6%	\$41.45	Associate's degree
Healthcare Support Workers, All Other	89	3.3%	\$19.80	Short-term on-the-job training
Customer Service Representatives	77	2.8%	\$14.29	Short-term on-the-job training
Receptionists and Information Clerks	64	2.3%	\$13.20	Short-term on-the-job training
Medical and Health Services Managers	61	2.3%	\$44.28	Bachelor's degree
Office Clerks, General	61	2.3%	\$14.38	Short-term on-the-job training
Sales Representatives, Services, All Other	59	2.2%	\$20.43	Short-term on-the-job training
Physicians and Surgeons, All Other	54	2.0%	\$104.20	First professional degree
Billing and Posting Clerks	52	1.9%	\$17.60	Short-term on-the-job training
Medical Secretaries	47	1.7%	\$17.30	Moderate-term on-the-job training
Diagnostic Medical Sonographers	46	1.7%	\$34.85	Associate's degree
First-Line Supervisors of Office and Administrative Support Workers	40	1.5%	\$21.65	Work experience in a related occupation
Medical Records and Health Information Technicians	32	1.2%	\$16.66	Postsecondary non-degree award
General and Operations Managers	31	1.1%	\$41.30	Bachelor's or higher degree, plus work experience
Medical Assistants	29	1.1%	\$14.83	Moderate-term on-the-job training
Office and Administrative Support Workers, All Other	27	1.0%	\$14.43	Short-term on-the-job training
Interviewers, Except Eligibility and Loan	27	1.0%	\$11.08	Short-term on-the-job training
Nursing Assistants	26	1.0%	\$15.31	Postsecondary non-degree award
Bill and Account Collectors	25	0.9%	\$15.85	Moderate-term on-the-job training
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	23	0.8%	\$17.08	Short-term on-the-job training
Registered Nurses	23	0.8%	\$38.08	Associate's degree
Data Entry Keyers	19	0.7%	\$15.72	Moderate-term on-the-job training
Nuclear Medicine Technologists	18	0.6%	\$36.58	Associate's degree
Bookkeeping, Accounting, and Auditing Clerks	18	0.6%	\$16.24	Moderate-term on-the-job training
Cardiovascular Technologists and Technicians	16	0.6%	\$27.26	Associate's degree
Medical Transcriptionists	15	0.6%	\$15.71	Postsecondary non-degree award
Health Technologists and Technicians, All Other	15	0.6%	\$25.09	Postsecondary non-degree award
Personal Care Aides	11	0.4%	\$9.87	Short-term on-the-job training
Medical Scientists, Except Epidemiologists	10	0.4%	--	Doctoral degree
Network and Computer Systems Administrators	10	0.4%	--	Bachelor's degree
Managers, All Other	<10	0.4%	--	Work experience in a related occupation
Computer User Support Specialists	<10	0.3%	--	Associate's degree
Accountants and Auditors	<10	0.3%	--	Bachelor's degree
Orderlies	<10	0.3%	--	Postsecondary non-degree award
Light Truck or Delivery Services Drivers	<10	0.3%	--	Short-term on-the-job training

Source: 2013 EMSI

III. Demand and Supply Analysis

Clark County NAICS 6216 Home Health Care Services

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Home Health Aides	1,904	29.3%	\$11.71	Short-term on-the-job training
Personal Care Aides	1,867	28.7%	\$9.87	Short-term on-the-job training
Registered Nurses	865	13.3%	\$38.08	Associate's degree
Nursing Assistants	387	5.9%	\$15.31	Postsecondary non-degree award
Licensed Practical and Licensed Vocational Nurses	213	3.3%	\$25.52	Postsecondary non-degree award
Physical Therapists	129	2.0%	\$49.25	First professional degree
Office Clerks, General	117	1.8%	\$14.38	Short-term on-the-job training
Medical and Health Services Managers	105	1.6%	\$44.28	Bachelor's degree
Occupational Therapists	66	1.0%	\$49.10	Master's degree
Healthcare Social Workers	62	1.0%	\$28.54	Master's degree
Medical Records and Health Information Technicians	44	0.7%	\$16.66	Postsecondary non-degree award
General and Operations Managers	42	0.6%	\$41.30	Bachelor's or higher degree, plus work experience
Sales Representatives, Services, All Other	34	0.5%	\$20.43	Short-term on-the-job training
Billing and Posting Clerks	30	0.5%	\$17.60	Short-term on-the-job training
First-Line Supervisors of Office and Administrative Support Workers	30	0.5%	\$21.65	Work experience in a related occupation
Customer Service Representatives	29	0.4%	\$14.29	Short-term on-the-job training
Physical Therapist Assistants	27	0.4%	\$28.16	Associate's degree
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	25	0.4%	\$17.08	Short-term on-the-job training
Medical Secretaries	24	0.4%	\$17.30	Moderate-term on-the-job training
Receptionists and Information Clerks	21	0.3%	\$13.20	Short-term on-the-job training
Speech-Language Pathologists	19	0.3%	\$35.47	Master's degree
Clergy	18	0.3%	--	Master's degree
Interviewers, Except Eligibility and Loan	17	0.3%	--	Short-term on-the-job training
Bookkeeping, Accounting, and Auditing Clerks	17	0.3%	--	Moderate-term on-the-job training
Childcare Workers	14	0.2%	--	Short-term on-the-job training
Maids and Housekeeping Cleaners	12	0.2%	\$12.95	Short-term on-the-job training
Office and Administrative Support Workers, All Other	12	0.2%	--	Short-term on-the-job training
Human Resources Specialists	11	0.2%	--	Bachelor's degree
Payroll and Timekeeping Clerks	11	0.2%	--	Moderate-term on-the-job training
Medical Assistants	10	0.2%	--	Moderate-term on-the-job training
First-Line Supervisors of Personal Service Workers	<10	0.2%	--	Work experience in a related occupation
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	<10	0.2%	--	Short-term on-the-job training
Bill and Account Collectors	<10	0.1%	--	Moderate-term on-the-job training
Nurse Practitioners	<10	0.1%	--	Associate's degree
Healthcare Support Workers, All Other	<10	0.1%	--	Short-term on-the-job training
Accountants and Auditors	<10	0.1%	--	Bachelor's degree
File Clerks	<10	0.1%	--	Short-term on-the-job training
Respiratory Therapists	<10	0.1%	--	Associate's degree
Light Truck or Delivery Services Drivers	<10	0.1%	--	Short-term on-the-job training
Chief Executives	<10	0.1%	--	Bachelor's or higher degree, plus work experience

Source: 2013 EMSI



III. Demand and Supply Analysis

Clark County NAICS 6219 Other Ambulatory Health Care Services

Occupation	Employed in Industry (2013)	% of the Total Jobs in Industry (2013)	Median Hourly Earnings	Education Level
Emergency Medical Technicians and Paramedics	476	29.0%	\$15.34	Postsecondary non-degree award
Ambulance Drivers and Attendants, Except Emergency Medical Technicians	151	9.2%	\$10.65	Moderate-term on-the-job training
Phlebotomists	106	6.5%	\$16.29	Short-term on-the-job training
Registered Nurses	76	4.6%	\$38.08	Associate's degree
Medical and Health Services Managers	43	2.6%	\$44.28	Bachelor's degree
Healthcare Support Workers, All Other	37	2.3%	\$19.80	Short-term on-the-job training
Police, Fire, and Ambulance Dispatchers	34	2.1%	\$26.72	Moderate-term on-the-job training
Nursing Assistants	33	2.0%	\$15.31	Postsecondary non-degree award
Medical and Clinical Laboratory Technicians	31	1.9%	\$18.64	Associate's degree
Office Clerks, General	27	1.7%	\$14.38	Short-term on-the-job training
General and Operations Managers	27	1.7%	\$41.30	Bachelor's or higher degree, plus work experience
Physicians and Surgeons, All Other	23	1.4%	\$104.20	First professional degree
Commercial Pilots	23	1.4%	\$35.47	Postsecondary non-degree award
Billing and Posting Clerks	22	1.3%	\$17.60	Short-term on-the-job training
Medical and Clinical Laboratory Technologists	22	1.3%	\$32.24	Bachelor's degree
Taxi Drivers and Chauffeurs	20	1.2%	\$13.86	Short-term on-the-job training
Medical Assistants	19	1.1%	\$14.83	Moderate-term on-the-job training
Personal Care Aides	16	1.0%	\$9.87	Short-term on-the-job training
First-Line Supervisors of Office and Administrative Support Workers	16	1.0%	\$21.65	Work experience in a related occupation
Interviewers, Except Eligibility and Loan	14	0.9%	\$11.08	Short-term on-the-job training
Customer Service Representatives	14	0.8%	\$14.29	Short-term on-the-job training
Receptionists and Information Clerks	13	0.8%	\$13.20	Short-term on-the-job training
Sales Representatives, Services, All Other	11	0.7%	--	Short-term on-the-job training
Bill and Account Collectors	11	0.7%	--	Moderate-term on-the-job training
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	11	0.7%	--	Short-term on-the-job training
Light Truck or Delivery Services Drivers	<10	0.6%	--	Short-term on-the-job training
Orderlies	<10	0.6%	--	Postsecondary non-degree award
Couriers and Messengers	<10	0.6%	--	Short-term on-the-job training
Bookkeeping, Accounting, and Auditing Clerks	<10	0.6%	--	Moderate-term on-the-job training
Medical Records and Health Information Technicians	<10	0.6%	--	Postsecondary non-degree award
Home Health Aides	<10	0.5%	--	Short-term on-the-job training
Healthcare Practitioners and Technical Workers, All Other	<10	0.5%	--	Bachelor's degree
Office and Administrative Support Workers, All Other	<10	0.5%	--	Short-term on-the-job training
Training and Development Specialists	<10	0.5%	--	Bachelor's degree
Sales and Related Workers, All Other	<10	0.4%	--	Moderate-term on-the-job training
Managers, All Other	<10	0.4%	--	Work experience in a related occupation
Radiologic Technologists	<10	0.4%	--	Associate's degree
Health Technologists and Technicians, All Other	<10	0.4%	--	Postsecondary non-degree award
Aircraft Mechanics and Service Technicians	<10	0.4%	--	Postsecondary non-degree award
Medical Secretaries	<10	0.4%	--	Moderate-term on-the-job training

Source: 2013 EMSI

IV. Fort Mohave Capture Analysis: Business Recruitment Strategy

SUBJECT SITE CAPTURE ANALYSIS- BUSINESS RECRUITMENT STRATEGY: FORT MOHAVE (SOUTHLAND) SITE

I. INTRODUCTION

To effectively meet the goals and opportunities stated in this Highest and Best Use Study regarding the subject site's capture analysis, the Consultant Team developed what past experience has shown to be an effective "business recruitment strategy". This strategy takes the place of a more traditional, formulaic and quantitative capture analysis, because of the speculative nature of the Southland site's development. The business recruitment strategy detailed below should be developed and implemented by Clark County's economic development team along with outside experts as needed.

The following chapter provides:

- An outline for the design of an action – oriented business recruitment strategy, and
- Specific guidelines and steps for the marketing, sales, follow-up and closing techniques for the recruitment plan

Our business recruitment strategy check list will conclude with high level recommendations on collaborations, partnerships, staffing needs and contracts for professional services.

The design of this business recruitment strategy encompasses 4 major areas, which includes the following:

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- 1) Research
- 2) Marketing tools
- 3) Sales process
- 4) Follow-up and closing techniques

II. RESEARCH

The research phase of the strategy lays the foundation and reasons for the specific industry targets and their respective marketing campaigns.

The research components for a business recruitment strategy, typically, include:

- A list of 5 – 7 target industries and their sub-categories that would be a good fit for the community and their development sites.
- A SWOT (strengths, weaknesses, opportunities and threats) analysis.
- A local labor force analysis that reviews skill sets, education assets and training resources.
- A real estate review comparing the costs of land and building leases with the immediate competition in the region.
- A GAP analysis which identifies those businesses in the area that are missing and would have a high degree of success through consumer or business demand.

The good news for the Laughlin area, and the 9,000 acre Southland site, is that several research documents have already been completed which includes the data requested from above. These reports, in total, can give the Clark County economic

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development team the needed direction and guidance for a business recruitment strategy.

Eight reports (studies and plans) should specifically be reviewed to address the opportunities for a proactive marketing effort. These reports include:

- Laughlin Economic Development Strategic Plan- produced by the Laughlin Economic Advisory Committee, Laughlin's Town Manager's Office, Clark County Comprehensive Planning Department, Applied Development Economics and the Placemaking Group – Fall 2006 – Fall – 2007, 52 pages
- Laughlin Land Use Plan, by the Clark County Comprehensive Planning Department, adopted May 2007 and amended September 2007, 147 pages
- Colorado River Targeted Economic Development Analysis: A community business matching model approach, written by the Cooperative Extension Office of the University of Nevada Reno, 2008, 170 pages.
- The Mohave County, Arizona Target Industry Analysis, written by ESI Corporation, Phoenix, AZ, July 2011, 127 pages.
- Unify/Regionalize/Diversify: An economic development agenda for Nevada, written by the Brookings Institution, Brookings Mountain West/UNLV and SRI International, November 2011.
- Economic & Demographic Assessment (Clark County SWOT analysis), prepared for the Las Vegas Global Economic Alliance, written by TIP Strategies, Austin, TX and RCG Economics, Las Vegas, NV, 2012, 71 pages.

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- Unify/Regionalize/Diversify (refining the Brookings Institution Framework), prepared for the Las Vegas Global Economic Alliance, written by TIP Strategies, Austin, TX, May 2013, 51 pages.
- Comprehensive Economic Development Strategy: Las Vegas Global Economic Alliance, prepared by TIP Strategies, Austin, TX and RCG Economics, Las Vegas, NV, June 2013, 83 pages.

All of these reports and plans make specific references to applicable industry targets. These target and growth industries serve as the foundation for a business recruitment and marketing strategy. In turn, the highest and best land uses for the 9,000 acre Southland site must be aligned with these industry targets. This report, based on our review, agrees with the assessments of industry targets outlined in the more recent studies listed above.

Lastly, a very helpful engineering study was published by VTN Consulting (Las Vegas, NV), in August 2009, for options in designing and building a proposed industrial park in the Southland master plan area. Three 400 acre sites were evaluated along the Needles Highway area and gave some realistic costs projections for each site. This research also needs to be included in the discussions for marketing the entire 9,000 acre site.

Several points required for future marketing can be drawn from this study. These points include recognizing utility development costs related to joining existing dry utilities and the existing wastewater reclamation facility. Upgrades to the existing facilities and additional infrastructure will need to be considered along with other utilities (such as electrical capacity and delivery). In addition, any grade issues or constraints for large plots such as the three potential 400-acre sites in the study need to be addressed.

III. MARKETING TOOLS

Once the target industries list is finalized a comprehensive marketing campaign can begin. Aggressive marketing campaigns need to be planned year round for the Southland site.

Most economic development marketing efforts include the following tools and techniques:

- Mail
- Newsletters
- Social media
- Events
- Trade shows
- Advertising
- Dedicated websites
- Partnerships
- Public relations
- Branding
- Collateral materials
- Referrals
- Corporate networking

Each of these tools will be discussed briefly, in context to the Southland site, and a list of recommended strategies will be presented. The keys for these techniques to be successful, is that they all need to be used together and to not rely on any one or two techniques or strategies. The marketing plan should utilize all 13 tools and to create a consistency in the messaging and promotions.

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1) Mail

Mail is an effective communication tool when used in a strategic and thoughtful format. This would include quarterly direct mail campaigns, use of emails on a monthly basis and periodic postcards directing the interested parties to the Laughlin website.

There are marketing consultants who specialize in email campaigns to business targets. As part of these campaigns, they also can do telemarketing follow up calls and set up appointments for the Clark County team to visit the offices of the business prospects. These appointments are called sales calls and are highly effective due to their one on one personal approach in the recruitment process.

2) Newsletters

Similar to email blasts, electronic newsletters promoting Laughlin and the Southland site can easily be developed on a monthly or quarterly basis. The newsletters should highlight positive economic activity in the Tri-State area, Laughlin business news and success stories, and directs the readers to the website on the Southland project.

3) Social Media

Today's marketing strategies can take advantage of several new and proven Internet opportunities. The Internet is a primary vehicle for image creation through the dissemination of facts, stories and anecdotes about the community – all with the intent of creating interest and ultimately attracting business to the area. The Internet has become the number one tool for businesses and site selectors in their location searches. It has provided the ability to publish easily and frequently at a low cost. Announcements, events, blogs, business success stories, news and profiles will help Laughlin stand-out as a vibrant and dynamic place of the future in which to do business.

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Some of the Internet opportunities include:

- Podcasting
- Video stories
- Twitter
- Facebook
- LinkedIn
- Instagrams
- Blogs
- YouTube

4) Events

Designing and implementing events is a very popular economic development marketing technique. Most cities host 2 to 4 special events per year to promote their cities or development sites.

Included in this category of events are several opportunities that Laughlin should pursue:

- Commercial investor seminars
- Invitations to top business prospects to existing sporting events in the region
- Recreational tours
- Real estate forums
- Hosting tours for top prospect companies and their management teams

5) Trade Shows

Trade shows are an excellent way to meet new companies and therefore market the Southland site. There are several options for Laughlin to participate in trade shows, including:

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- Direct participation in an “industry targeted” trade show by purchasing a booth space and marketing to the customers of the show.
- Attend one of the numerous trade show conventions held in the Las Vegas and “walk” the aisles to meet exhibiting companies and promote the Southland site to them.
- Participate with the State of Nevada when they attend trade shows and be part of their booth space.
- Participate with utility partners (i.e., NV Energy) when they attend industry trade shows.
- Research opportunities to jointly attend trade shows with regional Tri-State partners and stakeholders.
- Research opportunities to partner with the Las Vegas Global Economic Alliance when they attend trade shows.

6) Paid Advertising

Paid advertising use to be the number one method for economic development organizations to promote their cities, regions or development sites, however, with the rising costs of paid ads and the growth of the Internet the paid advertising options have decreased in popularity.

There are paid advertising opportunities to research and implement on a limited basis. The following list is a starting point for Laughlin to begin this research and to negotiate rates and terms with the publishing companies:

- Regional business journals in Southern California
-

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- West Coast Business Magazines (commercial/industrial real estate)
- Nevada Business Magazine
- Quality of life publications
- Special inserts/supplements to monthly magazines
- Airline magazines
- Lifestyle publications (golf, boating, biking, hiking, fishing, etc).

7) Website

A specific/designated website devoted to the Southland site is highly recommended. Characteristics of this website should include the following:

- Promotional, positive and opportunity oriented
- Data oriented
- Real estate information, costs and contacts
- Inquiry forms for the prospective company to fill out
- Client tracking ability
- News and media center
- Have all collateral materials and other social media techniques drive business inquiries to the Southland website
- Maintain the website on a regular and frequent basis

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8) Local Partnerships

It is stated numerous times by economic development professionals, that a successful marketing strategy is built around a team of individuals committed to the same vision. Bottom-line, economic development is a team sport and local partnerships are a way to build this team.

The county's economic development staff needs to continue to nurture its existing partnerships and to also embrace new local and regional partners.

Examples of these new partnerships would include:

- McCarran International Airport – Utilize free advertising signs to promote the Southland site.
- Distribute promotional materials inside the local casinos promoting the site.
- Create new website links with regional economic development partners, chambers and utilities.
- Seek out partnerships with local media (including print and television)

9) Public Relations

Public relations campaigns are very powerful marketing strategies. Most successful economic development organizations have very targeted and action oriented public relations campaigns focused on businesses outside their communities.

Examples that Laughlin could implement include:

- Regular and frequent media stories distributed to targeted industry journals and magazines.

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- Professionally developed media press kits (listing previous and current articles and their sources).
- Publish stories on positive industry or community rankings regarding the State of Nevada or Laughlin (i.e., best places to conduct business, lowest taxes, and good environments for raising a business or family).
- Creation of a business awards program to generate interest in the Tri-State area and show an appreciation of local businesses and developers.

10) Branding

Branding is another very common and powerful marketing technique. It can unfortunately be both a positive (Silicon Valley) or negative (rust –belt) issue for many communities. Most communities don't have a brand associated with their names because it is a difficult process to create a positive brand that has value to it. Branding is much more challenging for a community than consumer product branding (i.e., Nike – "Just do it").

However, it is recommended that Laughlin needs to be part of a larger and newer regional brand with Arizona and California in this Tri-State area. The current Tri-State brand has not matured into the positive regional brand that it could or should be at this time.

Laughlin also needs to establish its own branding for the Southland site.

11) Collateral Materials

Even though the Internet is the king of information, the use of printed materials is still a must in all economic development marketing plans. Examples of printed materials that Laughlin should create and produce include the following:

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- Industry specific brochures noting why they are a good fit for the Southland site (4-6 pages).
- Business directories of manufacturing companies, sub-suppliers and other targeted industry firms located in the region.
- Financial and labor incentives offered by the State and region.
- Labor force information and training opportunities.
- Business operating cost comparison sheets. (2-4 pages).

12) Referrals

Referrals are considered by most "sales" people as the best technique for making a deal. Economic developers are equally impressed with strategic referral programs. A referral is the name of an individual, or company, which is provided from a trusted source and a business that may have an interest in either relocating or expanding their operations. By a direct introduction from the source, the credibility of the County and Laughlin's marketing team is greatly enhanced and hopefully a personal one on one visit can be arranged.

Referrals should be generated by the following list of local individuals and organizations:

- Commercial realtors
 - Chambers of Commerce staff and members
 - Local businesses supportive of economic growth (banking, utilities, accounting, developers, contractors)
-

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- New companies that have expanded or relocated to Laughlin in recent years
- Laughlin Economic Development Corporation (members and Board)
- Las Vegas Global Economic Alliance
- Governor's Office of Economic Development

13) Corporate Networking

Corporate networking is a marketing technique that creates a partnership and participation with various business organizations. By supporting the efforts of the various organizations, the Laughlin staff will increase its visibility of the Southland site and also increases the opportunities for new business referrals.

Examples that Laughlin should include in their corporate networking strategies include:

- Direct participation with the Las Vegas Chapter of NAIOP (National Association of Industrial and Office Properties – a commercial real estate and development association).
- Direct staff support of local industry clusters (i.e., state manufacturing association).
- Regular communications and meetings with local and regional utilities (electric, gas, telecom, water & waste water).

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IV. SUMMARY OF MARKETING TOOL RECOMMENDATIONS:

The marketing component of the business recruitment strategy should be comprehensive, strategic and implemented on a regular basis for the best results in finding prospective companies wanting to move to the Southland site.

Marketing alone will not provide new companies and jobs. It is only the second step, after research, in the recruitment process. After, and during, the marketing campaigns the steps of “sales” and “follow-up” techniques will occur.

Marketing will capture the interest of a potential business relocation or expansion prospect, but it is up to the economic development professional to turn these valuable “leads” into a “closed sale” or commitment to come to Laughlin. The average time to close a sale after the initial marketing contact is between 6 months and one year.

The purpose of these marketing efforts is to build a pipeline of marketing leads. From these initial inquiries the sales process can truly begin.

The marketing efforts most highly recommended for Clark County and Laughlin regarding the Southland site include the following priorities:

- A dedicated website for the Southland site.
 - An aggressive public relations campaign.
 - Development of a social media campaign.
 - Creation of a formal business referral strategy.
 - Utilize local partnerships and corporate networks more creatively.
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- Establish new promotional events to highlight the Southland site.
- Participate in local and state industry trade shows.
- Create a new regional branding program/identity and initiate a Southland brand.
- Develop new printed collateral materials for follow up inquires and direct mail opportunities.

A. Sales Process

As stated earlier, the sales process is an extremely important step in the overall business recruitment strategy.

The research phase gives direction to the appropriate industry targets. The marketing phase creates interest in Laughlin and generates potential business leads. The sales process begins the direct communications between the economic development staff and representatives of the companies desiring to expand or relocate.

This sales phase also creates the “face to face” time, or personal communications, with decision makers in the prospective companies. Only through outstanding customer service and knowledge by the staff will the prospective company continue to have an interest in the Southland site.

The example below shows how this deal flow process works in growing a “pipeline” of business leads. A business recruitment pipeline, for a typical economic development organization, includes the following numbers and definitions:

- Lists of targeted companies are purchased – 5,000 names secured per year.

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- Suspects – 200 companies per year are generated from the County's marketing campaigns with initial requests for more information.
- Prospects – 100 companies per year continue to show interest in the community and are prime candidates for the sales process techniques.
- Clients – 60 companies per year that regularly communicate with the sales staff and have a serious interest in Laughlin.
- Commitments- 12 companies per year that state Laughlin has been selected and they begin their final real estate negotiations (leasing buildings or buying land).

B. Keys to Success in the Sales Process

Laughlin needs to have several components of the "sales" process in place to be successful. These keys to success include:

- A dedicated economic development staff to effectively deal with all inquiries from the marketing process and turn these leads into prospects, clients and commitments. Without a professional sales staff, the research and marketing efforts will not generate new commitments or jobs for the community.
 - The sales staff needs to be prepared expect success from their marketing efforts. They need to have a "game plan" set in place to handle all serious inquiries. The game plan outlines all of the staffs' roles and responsibilities, including county departments and their permitting process and support from local volunteers (Laughlin Economic Development Corporation).
 - The sales staff needs to have readily available the most updated economic data for their top prospects (labor, real estate costs and incentives). They
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also need to have an extensive customer service mentality and a professional client software tracking system (i.e., ACT). The software is a necessity to keep track of several hundreds of suspects and prospects.

- The sales staff must a sophisticated “follow-up” process set in place too. Contacting the company only once in the sales process will never close a sale. A systematic communication system needs to be in place for a successful follow-up program.

In summary, the sales process recommended for Laughlin is an extremely important step in the overall business recruitment strategy. Communities that are the most successful in the recruitment of new companies to their regions tend to always have the best economic development sales staffs. The best of the sales staffs also tend to be Certified Economic Developers and this professional designation is granted by the International Economic Development Council (“IEDC”). Southern Nevada has several Certified Economic Developers working in the Cities of Las Vegas and Henderson and Clark County.

Selling a community is both an art and science. The science component is the tangible cost comparisons between cities and states (taxes, utility costs, labor costs and insurance, real estate costs). The art side of the sale is the intangible areas of customer service and the trust built between the economic development staff and the prospective company.

C. Follow -Up and Closing Techniques

To be successful in the sales process, follow- up and closing strategies need to be implemented. “Follow- up” strategies are, basically, techniques by which a prospective company is contacted regularly by the economic development team to

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keep the communications lines open and to illustrate a sincere interest in their location to Laughlin. Ultimately, the County should want to them to verbally and contractually commit to moving to the area.

Recommendations for effective follow-up strategies, during the sales process, include the following:

- Conduct personal site visits to the company's headquarters or appropriate regional office to learn more about the company's products and needs. Top prospects should be visited at least twice a year.
- Invite the top prospects to visit the Laughlin area and host them during their visit. Research to see how the casino/ tourism industry could help during this hosting process. Hosting the company would include visits to the Southland property, and introducing the company's representatives to local businesses and educational leaders.
- Conduct in depth research on the top prospective companies. Use this knowledge and information for the benefit of the company. Introduce them to potential sub suppliers in the area.
- Phone and email the top prospects on a regular basis. The key is to not communicate too little or too much as to be a bother to them. The ACT database/software or other similar tools can be used to assist in timely communications.
- Create customized reports and proposals to all of the top prospects. These reports would include summaries of any incentives offered to them and updated business cost comparisons.

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- Secure positive testimonials from local CEO's and present these letters to the top prospects. Seek additional testimonials from other business leaders that are in similar industries with the top prospects.
- Find out during the sales process what the top prospects' quality of life interests are (such as boating, fishing, horses, etc). Retain local experts who have similar interests and expertise and seek to match them with the top prospects.

Knowing how and when to "close" the sale and receive a commitment from the top prospects is an acquired art in the recruitment process. Recommendations for "closing" techniques include:

- 1) Seek support from a senior elected official (Governor or County Commissioner) and request that they make a personal phone call to the company's CEO at the appropriate time.
- 2) Finalize the state or regional incentives package, and present the official package to the prospect. Insure that the public or private incentives are, in fact, in place and ready to go for prospective company.
- 3) Offer the top prospects an "on site "information fair for their employees, within the company's headquarters, to answer their questions about relocating employees to Laughlin (include local real estate and educational representatives at the fair).
- 4) Offer to provide the top prospective companies a "loaned executive" from the Laughlin community to help them during their relocation process. This loaned

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executive needs to be a business volunteer who can donate their time and energy to assisting this company on a regular basis. The County should find a representative willing to help a business in their relocation needs and someone that can be trusted to help the company.

It is important to know when (timing) to ask for the sales process to be closed with the top prospects. The County should not ask for the "order" too early and damage its communications with the company. The County should not risk losing the company to another community either, due to a lack of customer service.

Lastly, insure whatever commitments or incentives whatever has been promised to the relocating company can be delivered. This also includes commitments to help the company through the building and permitting process. Document these commitments and provide the necessary staff time to follow-up on the implementation phase of these commitments.

D. Major Recommendations – Southland Business Recruitment Strategy

In closing this section on a proposed business recruitment strategy for the 9,000-acre Southland site, the following major recommendations are presented for Clark County's consideration and, hopefully, implementation. They are listed in priority.

- 1) Hire a professional economic development team (county staff or consultants) to work exclusively with Laughlin and the Southland site. A minimum of 3 staff should be employed to implement the proposed business recruitment strategy as outlined in this report. The marketing of the Southland site should not be assigned only to the contracted land development firm. There are numerous examples locally where the cities (Las Vegas and Henderson)

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have utilized their existing economic development staffs to work with private land developers for the mutual benefit of the region (i.e. Symphony Park, Union Village). The City of Needles, California recently hired a private economic development consulting firm to assist it in promoting the city and recruiting new companies and jobs to the community.

- 2) Contract with a local public relations and marketing firm to assist the economic development team in the implementation of the marketing tools outlined in this study.
- 3) Regional collaboration needs to occur for the economic vitality of the Tri-State area. Major members in this collaboration should be Laughlin, Bullhead City, Kingman, Lake Havasu, Fort Mohave and Needles. A regional branding process should be a priority, along with sharing of business leads and joint marketing efforts.
- 4) A system for accelerating business referrals (companies who may have an interest in expanding or moving their operations) needs to be implemented. These referrals should come from local banking institutions, realtors, certified public accountants, architects, venture capitalists, EB-5 financial organizations, developers and major contractors.
- 5) Have the County's economic development team (or consultants) immediately review the various research documents and studies on the Laughlin area that highlight the target industries for a marketing strategy. The Mohave County Target Industry Analysis by ESI (Phoenix, AZ) is a helpful document and should be utilized to the fullest extent.

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- 6) Because the County is a dues paying member of the Las Vegas Global Economic Alliance, it should seek direct support from the organization and have them assist the Laughlin area more with business prospects and referrals.

- 7) The County should research the State of Nevada's NRS 244.2815 provisions for selling of public lands (Southland site) to a private developer for job creation benefits. The State law provides for discounts/incentives for economic development projects in the sale of public lands.