



Mapping the Future

An Analysis of Clark
County's Communities
and Economy

PREPARED FOR:

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PREPARED BY SRI INTERNATIONAL®

Center for Innovation Strategy and Policy

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Las Vegas Chamber of Commerce

Latin Chamber of Commerce

McCarran International Airport

University of Nevada Las Vegas

Urban Chamber of Commerce

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Mapping the Future

An Analysis of Clark County's
Communities and Economy

Executive Summary

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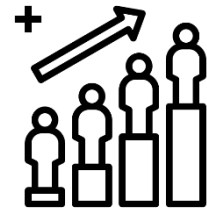
Executive Summary

Community & Economic Assessment

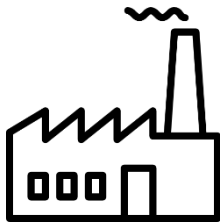
Demographics

Clark County has experienced rapid population growth (14.4%) between 2010 and 2018, far above the average for all U.S. metro areas (6.9%). Moving forward, Clark County should focus its efforts on attracting individuals in the prime working age population (i.e., those aged 25 to 44) to maintain a dynamic regional labor force.

There also remains significant variation in socioeconomic status among Clark County's unincorporated areas. Poverty rates range from 6.8% in Summerlin South to 21.9% in Sunrise Manor. Work remains to be done to close the socioeconomic gap between the various unincorporated areas.



Business & Industry



Clark County's economy grew at a steady pace prior to the COVID-19 pandemic. Emerging industries that assist the region's economic diversification include information technology, logistics, manufacturing, and healthcare. Though these industries currently represent a smaller portion of the region's economy, their promise for future growth is significant. Likewise, their resiliency in the face of the pandemic-induced economic recession speaks to their role in the region's economy moving forward.

Workforce & Employment

Southern Nevada's diversifying economy has led to notable growth in high-paying occupations such as computer systems design and data processing and hosting. Nevertheless, the region's economy remains dominated by low-wage and low-skill occupations such as food preparation and serving and retail sales. Underemployment remains a challenge for much of the region's population, with 44.0% of those with at least a bachelor's degree employed in occupations that do not require a four-year education. A similar challenge persists for those with some college or an associate's degree (70.0% underemployed) and those with a high school education or GED (39.0% underemployed).



Innovation & Entrepreneurship



Nevada continues to make progress toward becoming an “innovation economy.” Notably, UNLV has further cemented its importance to the region’s innovation economy by attaining R1 status for “very high research activity,” in addition to expanding funding and training opportunities for student entrepreneurs. Work remains to be done, however, particularly for the development and commercialization of new technologies envisioned by Clark County entrepreneurs. Among selected public universities in other Western states, UNLV outperforms only UNR in invention disclosures, patent applications, number of licenses, and startups formed.

Environment

Clark County residents have engaged with the region’s outdoor recreation assets at an unprecedented level during the pandemic. Between March and April 2020, BLM and other public lands in Clark County witnessed a 400% increase in visitor volume.

In addition to increased levels of engagement with their outdoor spaces, Southern Nevadan’s have also demonstrated awareness of their region’s unique habitat and the constraints of living in a desert climate. Despite a rapidly growing population, water use per capita has consistently decreased since 2000. Such conservation measures are necessary to support Clark County’s future growth.



Infrastructure & Energy



Southern Nevada’s existing infrastructure continues to favor vehicles, with a significant portion of the county’s population choosing to drive alone or carpool to work. While new infrastructure projects tend to focus on expanding roadway capacity and connectivity, there is an increased interest in mixed-use and transit-oriented development.

Clark County’s energy infrastructure has continued to evolve to allow greater use of renewable energy in the local grid. Though natural gas continues to dominate the energy scene in the county, solar power shows increasing promise for the region, and wind power may represent an underdeveloped source as well.

SWOT Analysis

The SWOT analysis highlights sources of strength and weakness that may be addressed, opportunities to be realized, and dangers and difficulties to be avoided.



STRENGTHS

Community & Quality of Life

- Large urban amenities with a small-town feel
- Comparative affordability
- Close-knit communities in a large urban area

Business & Industry

- Global brand drawing visitors worldwide
- Business-friendly environment

Workforce & Education

- Attraction of a skilled workforce
- Business-friendly environment

Innovation & Entrepreneurship

- Drive for applied technological innovation

Infrastructure

- Connection to regional, national, and international destinations
- Broadband accessibility

Environment

- Access to diverse outdoor recreation areas
- Streamlined endangered species conservation process for development
- Robust water conservation management



WEAKNESSES

Community & Quality of Life

- Placemaking and urban development
- Healthcare options and access
- Preference for new development over redevelopment

Business & Industry

- Fragmentation among local governments
- Slow pace of diversification

Workforce & Education

- Underprepared high school graduates
- Job growth in lower-skill, lower wage occupations

Innovation & Entrepreneurship

- Fragmented innovation ecosystem
- Gaps within the innovation ecosystem

Infrastructure

- Car-centric transportation infrastructure
- Low walkability beyond the Strip
- Constrained development potential due to federal land ownership
- Digital divide

Environment

- Complex and sensitive environmental issues
- Park deserts



OPPORTUNITIES

Community & Quality of Life

- Increasing number of business-savvy retirees

Business & Industry

- Easy access to West Coast Markets
- Conferences, conventions, and tradeshow as opportunities to attract businesses
- Reshoring of advanced manufacturing industries
- Emerging logistics hub

Workforce & Education

- Increased opportunity to telework and lower cost of relocation
- Remote worker programs as opportunity to attract high-wage workers
- Availability of innovative workforce programs

Innovation & Entrepreneurship

- Access to West Coast innovation ecosystem
- Technology development and deployment for 21st century cities

Infrastructure

- Modern and innovative transit
- Smart city innovation
- Partnerships with local and regional governments to expand resources for electric vehicles

Environment

- Expansion and diversification of renewable resource use
- Expansion of innovative water conservation



THREATS

Community & Quality of Life

- Growing disconnect between housing stock and housing needs
- Limited healthcare options and accessibility for many in the region
- "Sin City" reputation

Business & Industry

- Exposure to economic shocks
- Competition from other regions and the threat of online gambling

Workforce & Education

- Pervasive medium- to long-term unemployment in dominant industries
- Return to office-based work after COVID-19

Innovation & Entrepreneurship

- Overdependence on federal funding for local R&D activities
- Dwindling resources for entrepreneurs

Infrastructure

- Reduced need for commercial buildings

Environment

- Exposure to climate change
- Threat of regional and international actors to local environments

Strategic Direction

Vision

Clark County is a world-class gateway to the Mountain West, built upon prosperous and diverse communities and businesses.

Mission

Clark County catalyzes visionary initiatives that transform Southern Nevada into a smart, green, and vibrant region.

Goals & Objectives

- 1. Cultivate a Fertile Environment for Small Businesses and Entrepreneurs**
 - 1.1. Support and coordinate activities that underpin entrepreneurship networks.
 - 1.2. Ensure small-business owners have the tools and capabilities to scale successfully.
 - 1.3. Expand community financial services.
- 2. Accelerate Economic Diversification**
 - 2.1. Streamline business services.
 - 2.2. Support the growth of health services.
 - 2.3. Fuel lifestyle entrepreneurship in arts and culture and outdoor recreation.
- 3. Integrate the Workforce Ecosystem**
 - 3.1. Improve access to diverse choices for training and education for workers and employers, particularly among the region's underserved communities.
 - 3.2. Promote innovative remote workforce programs.
- 4. Mobilize Stakeholders around Community-Wide Initiatives**
 - 4.1. Reinforce strong relationships between Clark County and municipal governments.
 - 4.2. Build fundraising capacity among regional organizations.
- 5. Promote Community-Centered Design of the Built Environment**
 - 5.1. Implement smart city innovation throughout the county to serve residents and visitors
 - 5.2. Improve and diversify access to mobility options.
 - 5.3. Adopt and promote sustainable practices in energy and infrastructure.
 - 5.4. Encourage revitalization of distressed areas of unincorporated Clark County.
- 6. Ensure Equitable Access to Resources**
 - 6.1. Advance equity in both the workforce and the business community.
 - 6.2. Sustain and expand streamlined access to county services for residents and businesses.

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Mapping the Future

An Analysis of Clark County's
Communities and Economy

Introduction

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Introduction

Over the last decade, Clark County has demonstrated its resiliency. The impact of the Great Recession of the late 2000s was perhaps felt nowhere harder than in Southern Nevada, where consumer spending has traditionally driven the region's economy and employed Clark County residents. The global economic downturn produced strong headwinds for the region, slowing Clark County's return to growth. Nevertheless, through the efforts of regional stakeholders like the Clark County government and the Las Vegas Global Economic Alliance (LVGEA), as well as state partners such as the Governor's Office for Economic Development (GOED), Clark County has not only rebuilt its economy and communities but has expanded at an unprecedented rate.

As Clark County looks forward to the next decade, renewed dedication to purposeful development is necessary to further diversify the region's economy and address the needs of the county's diverse communities. The impact of the COVID-19 pandemic on the residents and businesses of Clark County has reinvigorated this need. To lead the charge, the Clark County government has established the Office of Community and Economic Development (OCED). OCED will play a critical role in enabling development throughout the region by assisting new, established, and prospective businesses in entering the Southern Nevadan market and engaging with local communities.

The Clark County Office of Community and Economic Development has engaged SRI International to develop a Community and Economic Development Strategic Plan for the county. SRI has performed other economic development projects in Southern Nevada, most recently including a comprehensive economic development strategy (CEDs) for LVGEA in 2019, as well as for the state through GOED. However, while prior work has focused primarily on the role of different state and local organizations in furthering economic development and diversification, this document intends to more acutely address the needs and challenges facing Clark County's communities, and how these needs work alongside economic change. This document includes an economic and community assessment, asset map, and SWOT analysis, while also laying out a strategic vision, goals, and an action plan to achieve this vision. An evaluation framework is also provided to measure the county's progress on several key performance metrics.

The following assessment serves to "diagnose" various characteristics of Clark County's communities and economy, identifying certain areas of interest or concern. Combined with the output of the visioning exercises, the assessment lays the groundwork for identifying specific actions stakeholder organizations can take to achieve the county's vision. The first section, the Economic and Community Assessment, primarily uses state and federal data to assess the region's performance over the last decade in a variety of subject areas, including industry, workforce, innovation, and environment. The Asset Map that follows is informed by interviews conducted by SRI with stakeholders throughout Clark County, supplemented by a review of literature related to the local communities and economy. Finally, the SWOT Analysis identifies the key characteristics of Clark County that impact its current and future performance.



Mapping the Future

Community & Economic Assessment

An Analysis of Clark County's
Communities and Economy

Community & Economic Assessment

Clark County is comprised of many diverse communities that drive the local economy. To understand the region's economy, it is also necessary to understand the trends emerging and forces impacting local communities. The Economic & Community Assessment seeks to understand the economic and societal forces driving Clark County forward, particularly as the county emerges from the COVID-19 pandemic, and to assess the region's performance on several key factors. The following are important for this assessment:

- Demographics
- Business & Industry
- Workforce & Employment
- Innovation & Entrepreneurship
- Environment
- Infrastructure & Energy

This assessment is largely driven by quantitative data collection. While SRI has spoken with many Clark County stakeholders, their inputs are more directly reflected in the Asset Map and SWOT Analysis.

Methodological Note

Most of the data in the Economic & Community Assessment are analyzed at the metropolitan statistical area (MSA) level, as defined by the U.S. Office of Management and Budget. The Las Vegas-Henderson-Paradise MSA is coextensive with Clark County, Nevada. Similarly, Clark County is the only county in the Southern Nevada region, as defined by the Nevada Governor's Office for Economic Development (GOED). Therefore, this report will refer to Las Vegas, the Las Vegas MSA, Clark County, and Southern Nevada, all of which should be interpreted as representing the same area unless otherwise noted.

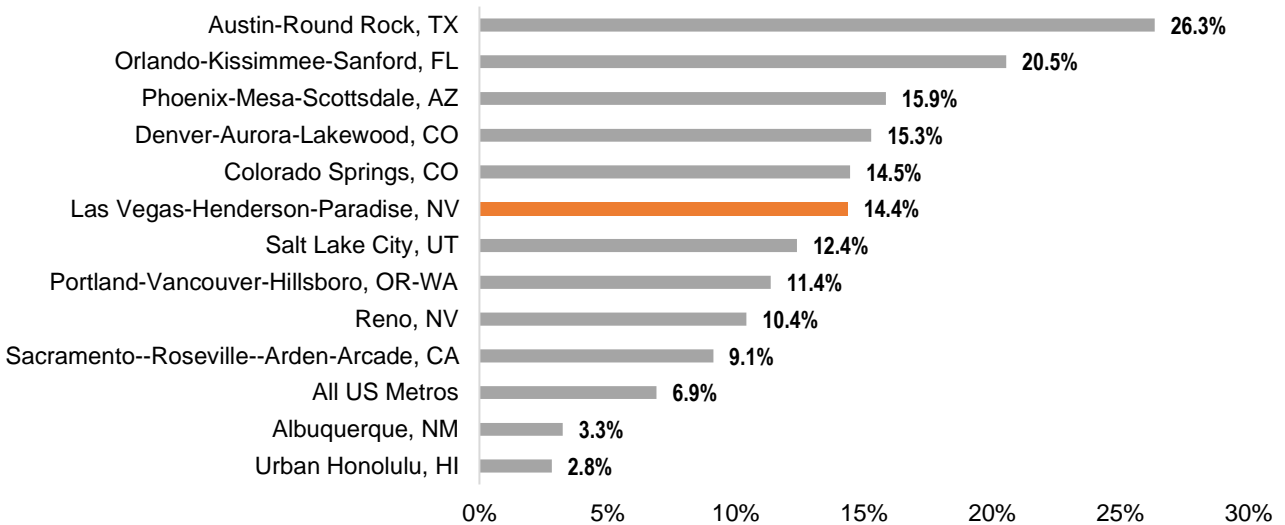
SRI's analysis uses comprehensive datasets from several state and federal statistical agencies, such as the U.S. Census Bureau, the Bureau of Labor Statistics, and the Nevada System of Higher Education (NSHE). Represented alongside Southern Nevada in these datasets are eleven peer metropolitan areas. These peer MSAs were chosen based upon a mix of criteria, including size, rate of growth, geographic proximity, and shared industry sectors.

Demographics

Clark County has seen significant population growth over the last decade. Between 2010 and 2018, the county's population swelled by about 280,000, bringing the total population for the Las Vegas-Henderson-Paradise metropolitan statistical area (MSA) to over 2.2 million residents. This represents an increase of more than 14%, far exceeding the national average for U.S. metropolitan areas (6.9%) during that same time. Among its peer metro areas, Las Vegas ranked sixth for percent increase in total population between April 2010 and July 2018 (Figure 1 below).

The Las Vegas Metro Area Has Experienced Rapid Population Growth

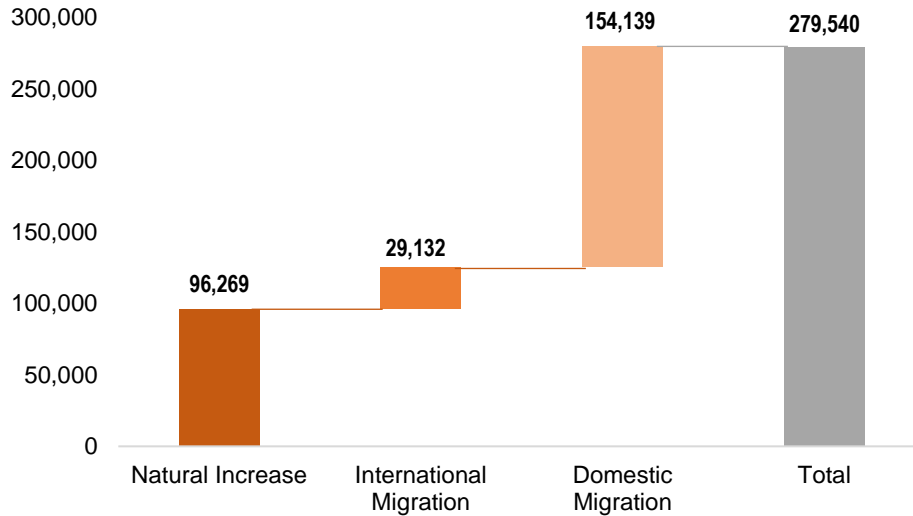
Figure 1: Percent Change in Population, April 2010 - July 2018. Source: Census Population Estimates Program.



When individuals relocate from one region to another, their decision to do so is often impacted by “push” and “pull” factors. Push factors are those that encourage or force an individual to move away from a certain area, such as a high cost of living or limited job opportunities. Pull factors, however, are what bring individuals to a certain location over other available options. Individuals may be attracted to a location because it has an affordable cost of living, there are promising job opportunities, the region is well-connected, among other factors. Individuals being pushed or pulled toward Clark County comprise the majority of the county’s population growth over the last decade, with domestic and international migration accounting for 65% of the county’s population growth between 2010 and 2018 (Figure 2 below).

Migration from Other U.S. Regions Accounts for Most of Southern Nevada's Population Growth

Figure 2: Composition of Population Growth in Las Vegas MSA, by Source of Growth, 2010-2018. Source: U.S. Census Population Estimates.

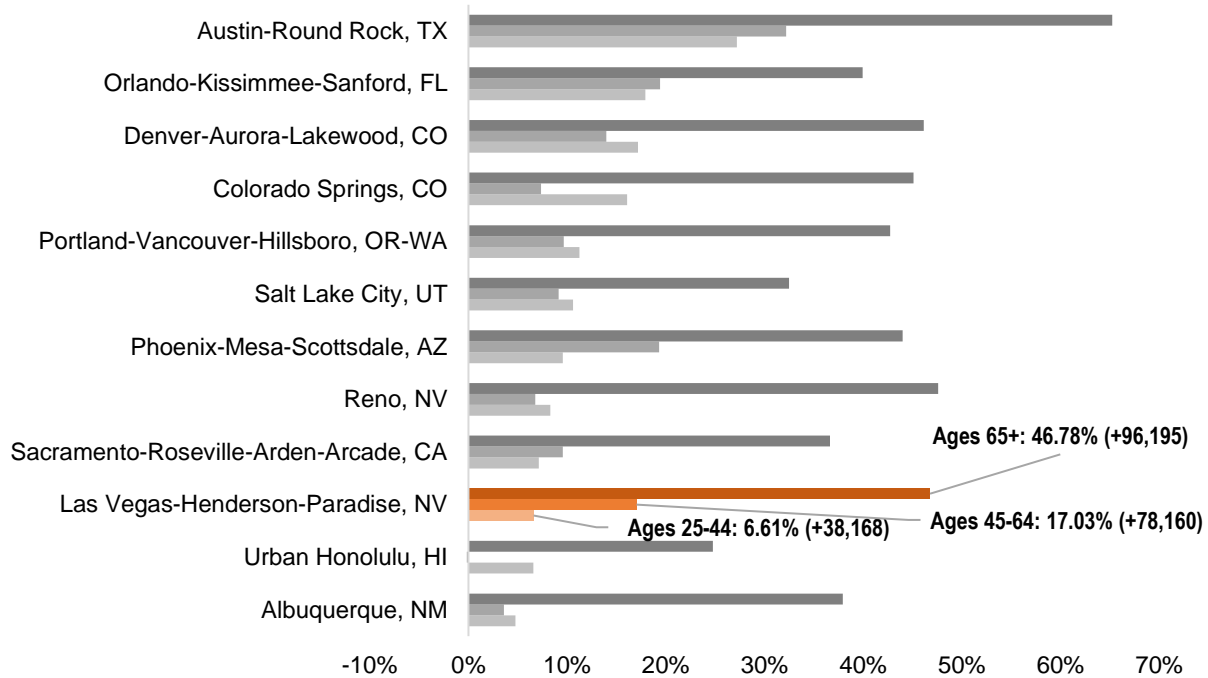


Using demographic data from the American Community Survey, it is possible to discern what age groups have been most compelled to move to Southern Nevada. This data may provide some indication as to how the region's assets attract individuals within certain age groups. Of particular interest for Southern Nevada is population growth in those aged 25–44, as these individuals are generally beginning their careers or relocating mid-career and are likely interested in growing their careers in Clark County.

As can be seen in Figure 3 below, though Clark County's overall population growth has been high (see Figure 1 above), the region has struggled to attract those that may be considered "prime working age," or those that are aged 25–44. Among its peer metro areas, the Las Vegas metro area ranked tenth for percent increase in population aged 25–44. Meanwhile, growth in older populations, specifically those aged 45–64 and 65 and older, has far outpaced the younger population, with Southern Nevada ranking third among its peer metro areas for percent growth in population aged 65 and older.

Growth in Working-Age Populations Remains Low

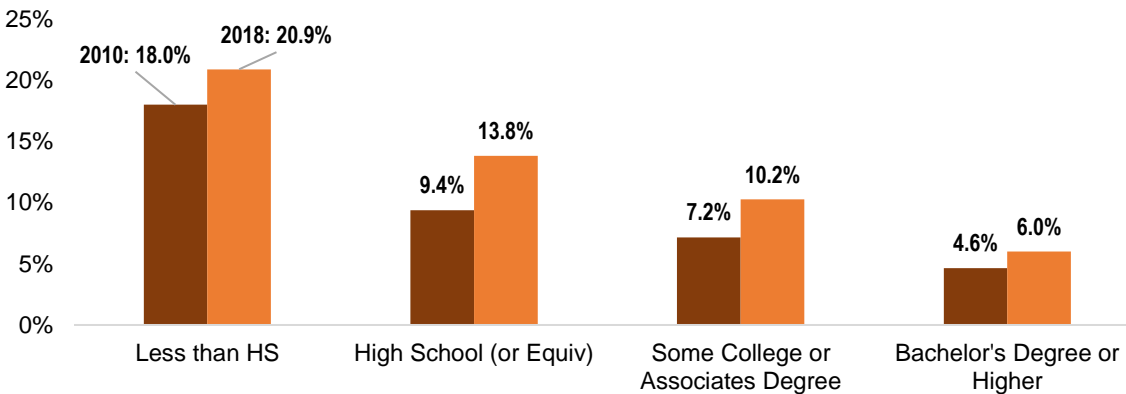
Figure 3: Population Change for Selected Age Groups, by MSA, 2010-2018. Source: American Community Survey, Five-Year Estimates, 2014-2018. Note: Data are ranked by MSA's population growth for those aged 25-44.



As Southern Nevada's population has grown, so, too, has its poverty levels (Figure 4 below). This increase has been most marked among Clark County's population without a four-year degree, following national trends that indicate higher education levels can lead to higher levels of income.

Poverty Rates Have Increased, Mainly for Those Without a Bachelor's

Figure 4: Poverty Rate, by Education Level, 2010 and 2018. Source: American Community Survey, Five-Year Estimates, 2014-2018.



The increase in Clark County’s poverty levels may indicate that the county’s population growth has been concentrated in lower-education, lower-income population groups. However, zip code data from the Economic Innovation Group (EIG) demonstrate that while poverty levels in Clark County have increased, the percentage of individuals living in distressed zip codes has almost halved between 2007 and 2017 (31.6% and 16.1%, respectively), and the percentage of individuals living in prosperous zip codes has increased from 21.2% to 35.1%. One way to interpret these data is the concentration of Clark County’s lower-income populations into smaller areas of the county, whereas other areas of the county are seeing greater income growth. Overall, according to EIG, Clark County has emerged from the Great Recession, during which it was classified as a “mid-tier” county to now be recognized as a “comfortable” county.¹

Assessing Unincorporated Clark County

There are differences between Clark County’s communities that are worth mentioning here. Specifically, a significant portion (nearly half of the county’s total) of Clark County’s population resides in unincorporated areas of the county, without a local governmental jurisdiction aside from Clark County government. These unincorporated areas comprise all land outside of the cities of Las Vegas, North Las Vegas, Henderson, Boulder City, Mesquite, and Nellis Air Force Base. Unincorporated Clark County represents 43% of the county’s population and contains 45% of its housing units. In general, unincorporated areas in the county are more economically distressed than its municipalities (see Table 1 below).

Residents in Unincorporated Clark County Are More Likely to Be Lower-Income, Nonwhite, and Renters

Table 1: Comparison of Socioeconomic Indicators Between Incorporated and Unincorporated Areas in Clark County, 2018.
Source: American Community Survey, Five-Year Estimates.

Socioeconomic Indicator	Unincorporated Areas	Incorporated Areas
Population	921,644	1,219,930
Housing Units	401,545	487,011
% Nonwhite	38%	31%
Median Household Income	\$54,593	\$63,132
Median Worker Earnings	\$31,498	\$35,119
Unemployment Rate	7.3%	7.2%
% Renters	52%	43%
% Homeowners	48%	57%
Median Age of Homes (in years)	27	28
Residential Vacancy Rate	17%	11%

Although employment rates between the county's incorporated and unincorporated areas are comparable, residents living in unincorporated areas are generally poorer and more likely to be nonwhite than those residing in the municipalities. Compared to municipal residents, a significantly larger share of residents in unincorporated areas are renters. Lastly, the vacancy rate in unincorporated areas is substantially higher despite the median age of homes being similar to that of homes in incorporated areas.

However, not all unincorporated areas in the county are distressed. Rather, as shown in Table 2, distress is concentrated in several unincorporated places, while other areas are relatively prosperous.

Economic Distress Varies across Unincorporated Areas

Table 2: Comparison of 2018 socioeconomic indicators between unincorporated places in Clark County. Source: American Community Survey, 5-Year Estimates. Note: Highlighted data signify that the unincorporated place ranks in the top three for % Nonwhite, % Hispanic, % Adults over 25 without High School Degree, Unemployment Rate, Poverty Rate, % Renters, Median Age of Home, and Residential Vacancy Rate, and the bottom three for Median Household Income and Median Earnings.

Socioeconomic Indicator	Unincorporated Regions of Clark County								
	Paradise	Spring Valley	Sunrise Manor	Enterprise	Whitney	Winchester	Summerlin South	Laughlin	Moapa Valley
Population	233,689	199,722	192,934	164,314	43,072	28,331	27,506	7,502	6,843
% Nonwhite	43%	48%	48%	47%	55%	42%	24%	15%	4%
% Hispanic	35%	24%	53%	19%	36%	49%	11%	14%	8%
% Adults over 25 without a High School Degree	16%	12%	27%	7%	16%	24%	4%	13%	9%
Unemployment Rate	7.9%	5.7%	10.1%	4.4%	9.4%	10.1%	4.8%	16.4%	4.8%
Poverty Rate	17.6%	12.5%	21.9%	7.9%	15.4%	20.4%	6.8%	15.1%	7.0%
Median Household Income	\$46,313	\$55,828	\$41,729	\$76,952	\$49,925	\$37,737	\$88,969	\$33,851	\$69,361
Median Earnings	\$29,964	\$32,231	\$26,493	\$40,473	\$30,066	\$27,201	\$57,614	\$21,864	\$47,394
% Owners	39%	45%	50%	59%	52%	36%	68%	42%	77%
% Renters	61%	55%	50%	41%	48%	64%	32%	58%	23%
Total Housing Units	113,716	87,715	71,084	64,430	17,448	14,992	13,126	5,624	2,944
Median Age of Home (in years)	31	24	30	15	19	44	15	30	31
Residential Vacancy Rate	20.5%	15.0%	11.9%	14.5%	14.8%	23.1%	12.4%	31.8%	21.9%

There is wide variation in economic distress among Clark County's unincorporated places, with clusters of distress concentrated in Winchester, Laughlin, Sunrise Manor, and Paradise. Poverty is highest in Sunrise Manor, Winchester, and Paradise, which corresponds to relatively high unemployment and depressed income and earnings in these areas. The majority of residents in Paradise, Winchester, Laughlin, and Spring Valley are renters, whereas residents in more prosperous areas tend to be homeowners.

The median age of homes in Winchester, Paradise, Moapa Valley, Sunrise Manor, and Laughlin is older than that of the county's unincorporated areas as a whole, with homes in Winchester being significantly older than most other areas. Residential vacancies generally correspond to the median age of homes. Laughlin's vacancy rate, at 32%, is by far the highest, followed by Winchester, Moapa Valley, and Paradise.

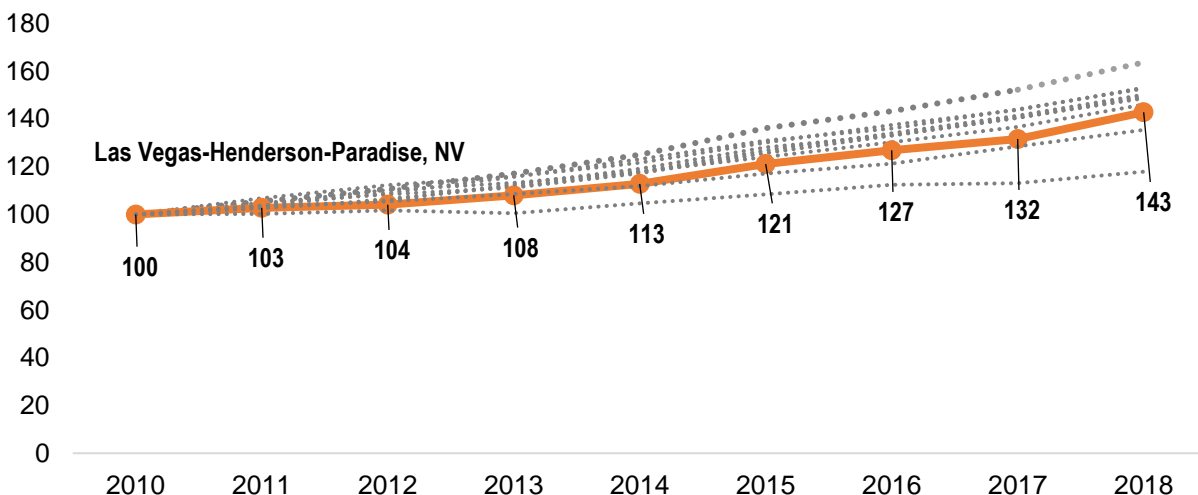
In summary, the above analysis has shown that Clark County's unincorporated areas are generally more economically distressed than its incorporated areas. However, distress in unincorporated areas appears to be concentrated in places such as Winchester, Laughlin, Sunrise Manor, and Paradise. These findings have significant implications for the county's economic development strategy, as policies and programs may need to prioritize these most distressed areas.

Business & Industry

Between the Great Recession and the COVID-19 pandemic, Clark County has achieved an impressive economic rebound that is evidenced by strong gross domestic product (GDP) and employment growth. The county's GDP grew by 43% between 2010 and 2018, or an average annual rate of 4.6% (Figure 5). This places Southern Nevada's economic growth solidly among the middle tier of its peer metro areas, ranking seventh for percent growth between 2010 and 2018. As a result, Clark County's economic growth has kept pace with most of its peer regions and has closely paralleled growth in the Orlando, Phoenix, and Colorado Springs metro areas.

Clark County Has Kept Pace with Peer Regions in GDP Growth

Figure 5: Index of GDP Growth, by MSA, 2010-2018. Source: Bureau of Economic Analysis.



Clark County's job market enjoyed a prolonged growth phase since 2010, driven by an influx of new residents and its strong economic recovery. Employment in all sectors grew by 29%, from about 797,000 jobs in 2010 to 1,025,000 jobs in 2019. The private sector added about 218,500 jobs in the same period, expanding by 31% from its 2010 employment levels.

While leisure and hospitality remain the bedrock of Clark County's economy, employment in the sector has largely stagnated or even declined in some areas. In contrast, rapid growth in industries such as healthcare, logistics, IT, and manufacturing suggests that the economy has diversified since the Great Recession. Nevertheless, the leisure and hospitality sector still accounts for one out of every three jobs in Clark County.

Figure 6 below shows the growth trends of Clark County's major employment sectors since 2010. Although the business, professional, education, and health services sectors grew steadily, leisure and hospitality remain by far the largest sector in the region prior to COVID-19. Unfortunately, it is also the sector that is most vulnerable to the pandemic. The numbers in parentheses represent the change in employment between February 2020 and September 2020. Employment in leisure and hospitality contracted significantly in the early phases of the pandemic as businesses shut down and visitor travel halted, falling 47% between February and April 2020. The industry has rebounded somewhat, recovering about half of the jobs lost since February 2020, but employment remains down by about 24% as of September 2020. Whereas other sectors, such as financial activities and business and professional services, were able to continue operating through remote work and thus were less affected by the pandemic, the leisure and hospitality sector had no such alternative.

Prior to COVID-19, Employment in Southern Nevada Grew Steadily

Figure 6: Las Vegas-Henderson-Paradise MSA Non-Seasonally Adjusted Employment (in thousands), by Selected Industry, January 2010 to September 2020. Source: Quarterly Census of Employment and Wages, U.S. Bureau of Labor Statistics. Note: The data in parentheses represent the change in employment from February 2020 to September 2020, capturing the impact of the COVID-19 pandemic on employment. The grey line indicates the beginning of stay-at-home orders caused by the COVID-19 pandemic in March 2020.

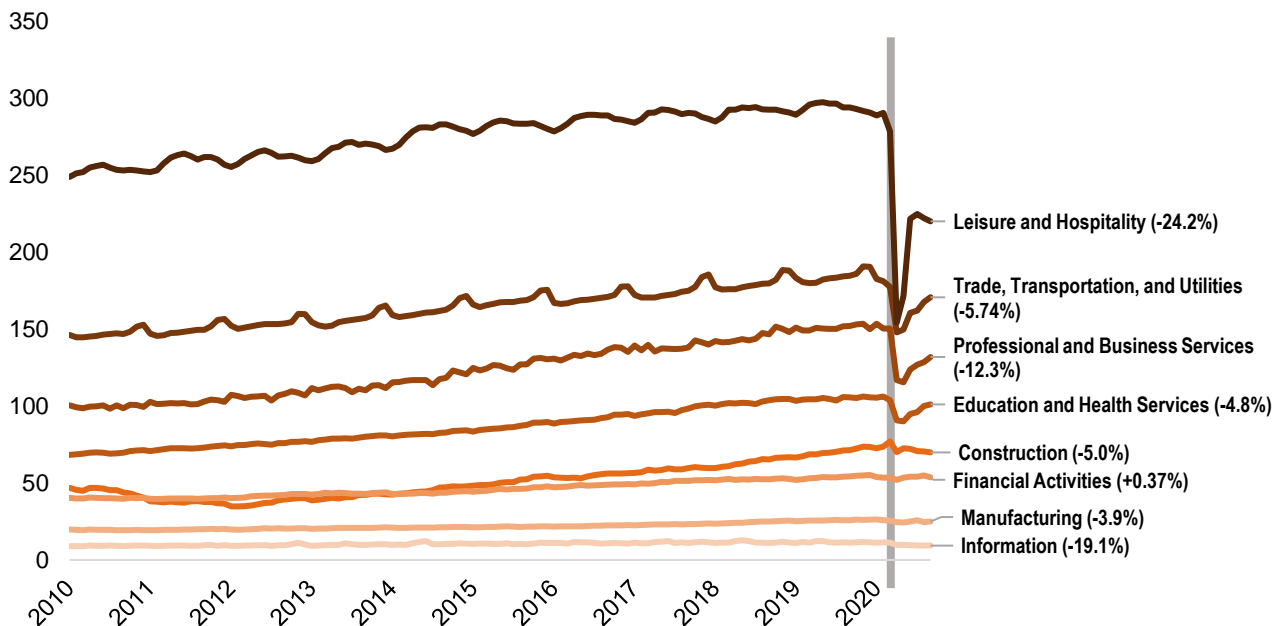
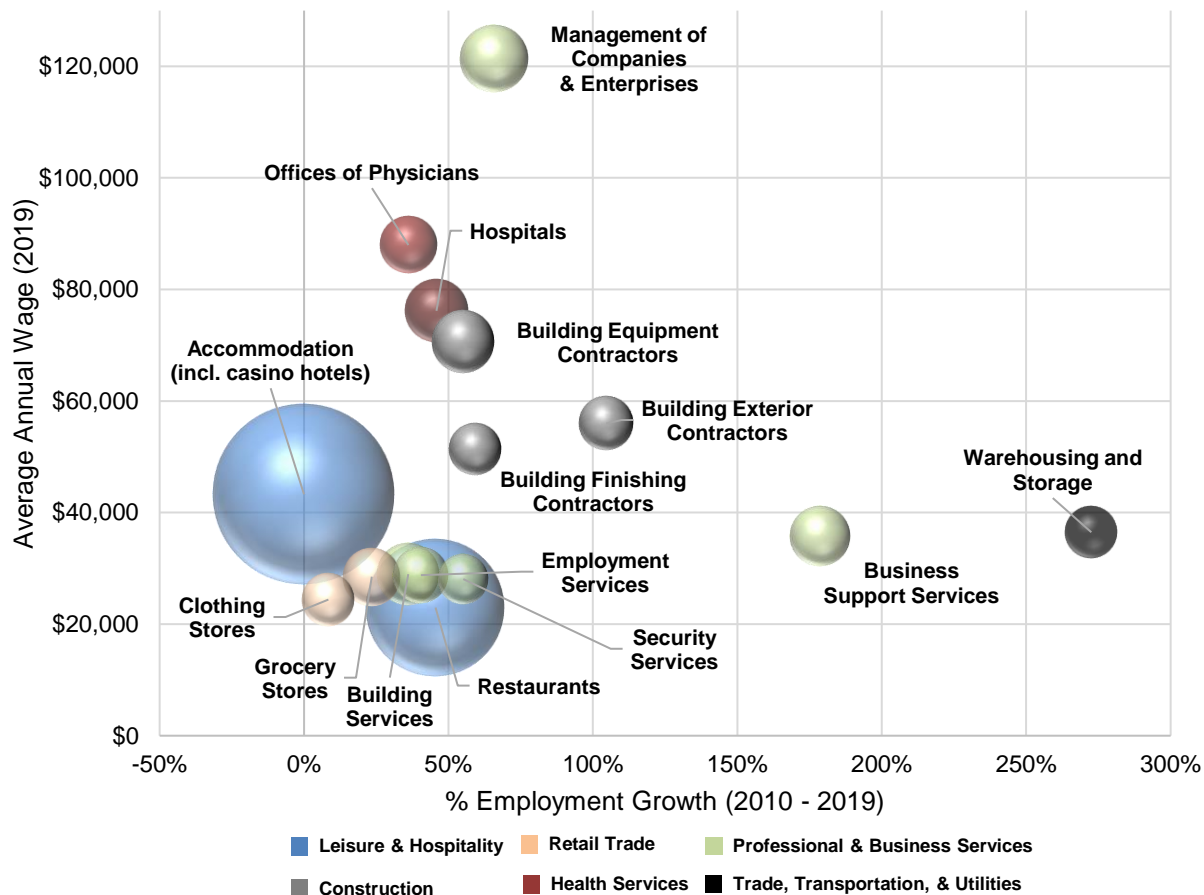


Figure 7 illustrates the extent to which the industry landscape revolves around gaming, accommodation, and tourism. As the county's economic base, the restaurant and accommodation industries (which include casino hotels) account for more than 280,000 jobs, or roughly a quarter of the county's employed workforce. These two industries depend on supporting industries in the business and professional services sector while creating demand for other industries, such as local retail stores. The relatively low wages in accommodation and restaurants, as well as in most of its supporting industries, present a significant challenge to Clark County's economic development objectives. However, the county's strong healthcare sector and the emergence of new industry clusters present opportunities for the region to build a more diverse economy.

Southern Nevada's Economy Revolves around Accommodation & Tourism, but Health Services and Logistics Represent Potential Opportunities

Figure 7: Employment Growth and Wages in Clark County's Fifteen Largest Industries. Source: Quarterly Census of Employment and Wages, U.S. Bureau of Labor Statistics. Note: Size of bubbles represents number of employed workers in each industry; industries aggregated at the 4-digit NAICS code level.



Emerging industries which have experienced rapid growth since 2010 include those in the information technology, logistics, manufacturing, consulting, and healthcare sectors (Table 3). In information technology, the software publishing, data processing, and computer systems design

industries grew by 89% and added approximately 4,000 jobs between 2010 and 2019. Wages in these industries tend to be above \$90,000, and continued growth has the potential to improve job quality in the county. Logistics-based industries, such as those that support air and ground transportation, have also added thousands of jobs and have emerged as a major industry cluster. Though logistics typically does not offer high wages, it does present another avenue to diversify the county economy away from leisure and hospitality. Lastly, the county's population growth, particularly among the elderly, has driven demand for health services. Hospitals, laboratories, and physicians' offices have added thousands of jobs and could present the local workforce with higher-wage alternatives to tourism-related jobs.

Select High-Growth Industries in Clark County

Table 3: Select High-Growth Industries in Clark County, by Employment and Average Annual Wage. 2010-2019. Source: Quarterly Census of Education and Wages, Bureau of Labor Statistics.

Industry	2010 Employment	2019 Employment	Percent Growth	Avg. Annual Wage
Computer Systems Design	3,749	5,883	+57%	\$98,847
Software Publishers	438	1,209	+176%	\$117,369
Data Processing & Hosting	409	1,604	+292%	\$95,216
Warehousing and Storage	3,656	13,620	+273%	\$36,479
Support Activities for Air Transportation	2,578	5,010	+94%	\$56,602
Hospitals	13,614	19,853	+46%	\$76,172
Medical Diagnostics and Laboratories	1,935	3,609	+87%	\$64,990
Management, Scientific, and Technical Consulting Services	2,570	4,585	+78%	\$87,074
Architectural and Structural Metals Manufacturing	816	1,785	+119%	\$52,354

Clark County's strong economic growth and its path to diversification had gone unimpeded up until the COVID-19 pandemic. While leisure and hospitality remain the dominant economic driver, the county's large and growing healthcare sector, the rapid rise of its logistics and transportation industries, and emerging opportunities in IT present an avenue to accelerate the diversification of Clark County's economic base.

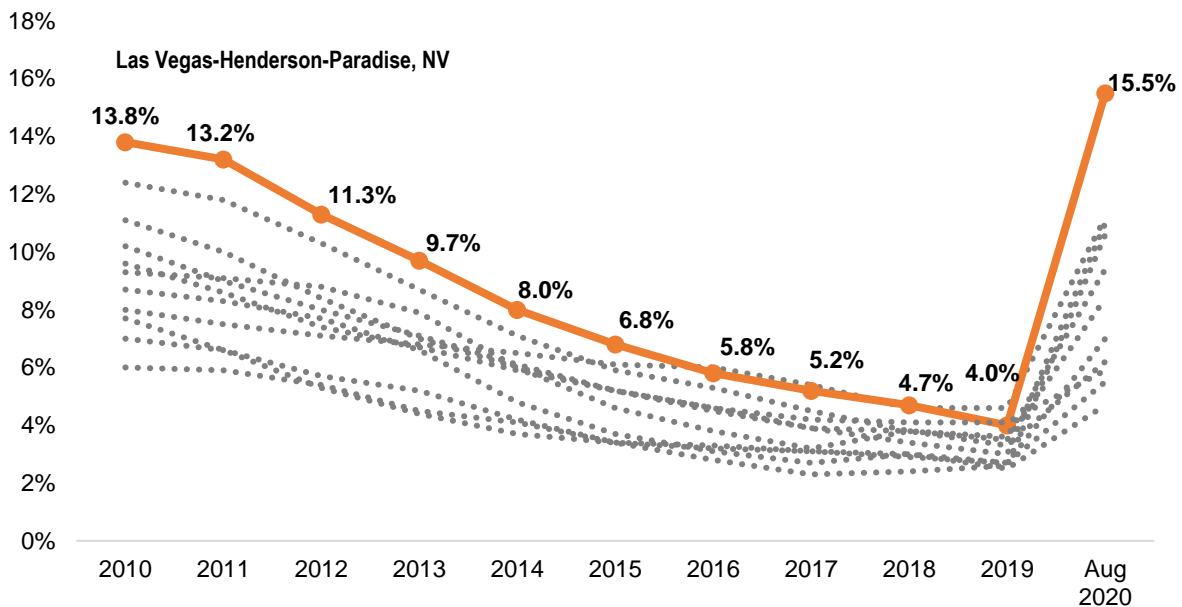
The need for Clark County to pursue industry diversification has been underscored by the economic fallout of the COVID-19 pandemic. While casinos and hotels have largely shut down, industries such as IT, professional services, and finance are able to continue operating due to their ability to telework. Consequently, regions in which these industries are prominent have been able to keep more workers employed and more businesses open during the pandemic. As Clark County plans for its post-pandemic economic recovery, developing a strategy that fosters a diversified mix of industries is critical to building a more resilient and sustainable economy.

Workforce & Employment

Clark County's labor market has seen a strong recovery since the depths of the Great Recession. The unemployment rate has fallen sharply as strong job growth made more positions available to local residents. Compared to peer metro areas, however, Clark County's unemployment rate has remained consistently high and was outpaced only by Phoenix, Arizona (4.1%) and Albuquerque, New Mexico (4.6%) (Figure 8).

Unemployment Fell Significantly before the COVID-19 Shutdown

Figure 8: Unemployment Rate, by MSA, 2010-2019. Source: Bureau of Labor Statistics.

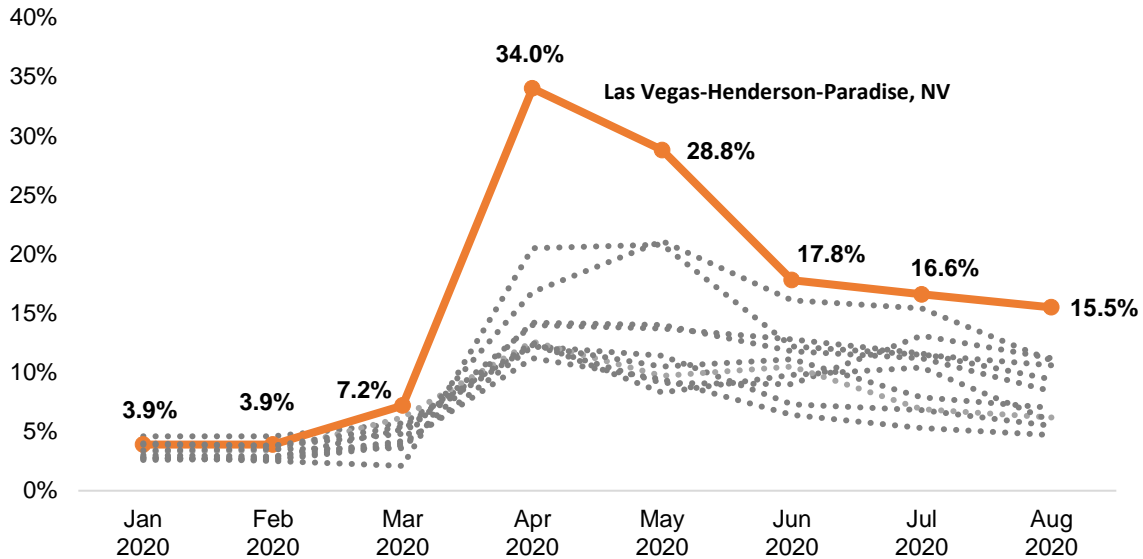


The COVID-19 pandemic has had a greater impact on Clark County's labor market than most metro areas in the United States. Lockdowns and business closures in the Leisure and Hospitality sector prevented a large proportion of Clark County's workforce from working. The unemployment rate as of August 2020 (15.5%) is the fifth highest among the nation's 389 metro areas and far higher than Clark County's peer metro areas.

Figure 9 provides a more granular view of the pandemic's impact on unemployment. As shutdowns began in March and took full effect in April, the unemployment rate in Clark County jumped to 34% before falling to 15.5% in August as some businesses reopened. The employment impact for peer metro areas was less dramatic, especially for areas whose workforces contain large numbers of telework-enabled workers and businesses. For example, the August 2020 unemployment rate in Austin, Texas was 5.5%, due in part to its outsized Business Services and IT sectors whose workers are generally able to continue working from home during the pandemic.

COVID-19 Brought a Disproportionate Impact on Clark County's Labor Market

Figure 9: Unemployment Rate, by MSA, January 2020 – August 2020. Source: Bureau of Labor Statistics.



In the decade between the Great Recession and COVID-19, Clark County's labor market has become more diverse as growth in higher-wage and higher-skill occupations, such as those in healthcare and business operations, led to a corresponding decrease in the share of lower-wage retail and sales jobs. Nevertheless, restaurant workers, office and administrative assistants, and sales workers still comprise almost 39% of all workers in Clark County (Table 4).

Southern Nevada's Most Popular Occupations Are Mostly Low-Wage

Table 4: Top Ten Occupations in Clark County, by Number of Employees. Source: Bureau of Labor Statistics, Occupation and Employment Statistics.

Occupational Category	2019 Employment	2019 Employment Share	Change in Employment Share 2010–2019	2019 Annual Median Wage
Food Prep. and Serving	151,120	14.8%	-1.2%	\$24,980
Office and Admin. Support	138,720	13.6%	-3.5%	\$35,680
Sales	109,480	10.7%	-0.5%	\$27,550
Transportation and Moving	88,500	8.7%	+1.6%	\$30,410
Personal Care and Service	58,100	5.7%	-0.8%	\$21,480
Building and Grounds Maintenance	57,370	5.6%	-1.0%	\$34,000
Construction and Extraction	53,250	5.2%	-0.3%	\$47,320
Management	50,120	4.9%	+0.4%	\$95,960
Healthcare and Technical	47,270	4.6%	+0.5%	\$83,090

Occupational Category	2019 Employment	2019 Employment Share	Change in Employment Share 2010–2019	2019 Annual Median Wage
Business and Financial Operations	38,960	3.8%	+0.7%	\$62,120

Clark County's labor market, despite trending toward higher-quality jobs (albeit slowly), is still overwhelmingly concentrated in low-wage, low-skill, and service sector occupations. The four largest occupations in the county are Retail Salespersons, Fast Food and Counter Workers, Waiters and Waitresses, and Cashiers, which together comprise one in eight jobs within the county. Of the 20 largest occupations (comprising 40% of the county workforce), only four occupations offer an average annual wage above \$35,000.

The relative scarcity of higher-wage jobs in Clark County is reflected in the education levels of its labor force. Only 26% of Clark County workers had Bachelor's degrees in 2018, by far the lowest among peer regions but a slight improvement from 2010, when 24% of workers were college graduates (Table 5).

Clark County's Labor Force Remains Concentrated in Lower Education Levels

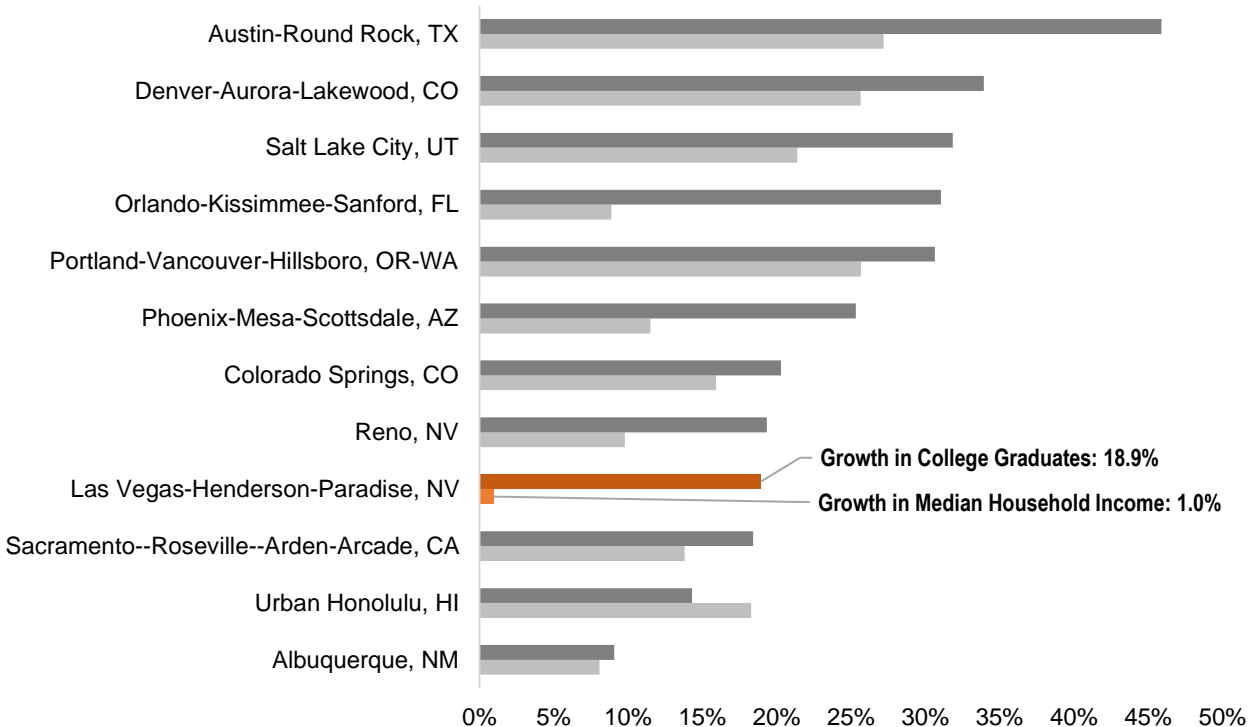
Table 5: Labor Force Educational Attainment, by MSA, 2018. Source: American Community Survey, 5-Year Estimates.

	Less than High School	High School Graduate	Some College or Associate Degree	Bachelor's Degree or Higher
Austin-Round Rock, TX	8%	17%	27%	47%
Denver-Aurora-Lakewood, CO	7%	18%	28%	47%
Portland-Vancouver-Hillsboro, OR-WA	7%	17%	33%	43%
Colorado Springs, CO	5%	18%	36%	41%
Urban Honolulu, HI	5%	23%	33%	38%
Sacramento–Roseville–Arden-Arcade, CA	8%	19%	35%	38%
Salt Lake City, UT	8%	22%	34%	36%
Orlando-Kissimmee-Sanford, FL	7%	23%	34%	36%
Albuquerque, NM	9%	22%	34%	35%
Phoenix-Mesa-Scottsdale, AZ	10%	21%	34%	35%
Reno, NV	11%	23%	34%	32%
Las Vegas-Henderson-Paradise, NV	13%	27%	34%	26%

In general, growth in a region's college-educated workforce is correlated with rising incomes in its resident population. While this has been the case for other regions in Clark County's peer group, the county's 19% increase in its college-educated workers has not led to income growth between 2010 and 2018 (see Figure 10 below). Instead, median household income has stagnated since the Great Recession while incomes in other regions have grown considerably. The county's median household income in 2018 (\$56,802) is roughly the same as it was in 2010 (\$56,258). Among peer metro areas, Clark County has experienced the lowest growth in median household income.

Growth in Household Income Has Lagged Peer Regions Despite Increase in College-Educated Workers

Figure 10: Growth in College Graduates and Median Household Income, by MSA, 2010-2018. Source: American Community Survey, Five Year Estimates.



Stagnant growth in household income may be a symptom of the negative impact that the county's dependence on leisure and hospitality, an industry that relies on a less educated workforce and pays relatively low wages, has on the region's long-term economic well-being. Even though the county's labor force is relatively less educated, the scarcity of higher-wage and higher-quality jobs (which typically require at least a Bachelor's degree) means that a sizable share of college-educated workers are compelled to accept jobs that do not require a Bachelor's degree. As Table 6 shows, only 56% of Clark County's workers with Bachelor's degrees work in occupations that require a Bachelor's degree. The rest work as casino workers, office clerks, and restaurant servers – occupations that do not typically require a 4-year college education. Among workers who have some postsecondary education but did not receive a Bachelor's, 70% work in occupations that require only a high school education or no formal education at all. These findings strongly suggest that a sizable share of Clark County's labor force is underemployed.

Clark County's Workforce Is Underemployed

Table 6: Cross-Tabulation of Clark County Workers' Educational Attainment by their Jobs' Entry-Level Education Requirements, 2018. Source: Bureau of Labor Statistics Employment Projections Program; American Community Survey 2014-2018; IPUMS USA Microdata. Note: Text in italics represents the five largest occupations in each category. The "Percent Underemployed" may not add to 100% due to rounding.

		Workers by Educational Attainment			
		Less than High School	High School or GED	Some College or Associate Degree	Bachelor's Degree or Higher
Jobs by Entry-Level Education Requirement	Less than High School	60% <i>Cleaners/housekeepers Cooks Construction laborers Cashiers Freight laborers</i>	39% <i>Cleaners/housekeepers Cashiers Cooks Waiters/Waitresses Retail salespersons</i>	23% <i>Retail salespersons Waiters and waitresses Cashiers Bartenders Cleaners/Housekeepers</i>	11% <i>Retail salespersons Waiters/waitresses Cashiers Cleaners/Housekeepers Cooks</i>
	High School or GED	31% <i>Drivers Carpenters Casino workers Retail supervisors Customer service reps</i>	45% <i>Drivers Retail supervisors Casino workers Security guards Customer service reps</i>	47% <i>Customer service reps Retail supervisors Security guards Casino workers Drivers</i>	28% <i>Retail supervisors Real estate agents Customer service reps Casino workers Secretaries</i>
	Some College or Associate Degree	4% <i>Auto mechanics Manicurists Nursing assistants Hairstylists Teaching assistants</i>	7% <i>Hairstylists Auto mechanics Office clerks Teaching assistants HVAC mechanics</i>	10% <i>Office clerks Nursing assistants Hairstylists Paralegals Auto mechanics</i>	5% <i>Office Clerks Paralegals Teaching assistants Nursing assistants</i>
	Bachelor's Degree or Higher	4% <i>Managers HR workers Computer specialists Registered nurses Writers and authors</i>	9% <i>Managers Computer specialists HR workers Purchasing agents Wholesale/retail buyers</i>	19% <i>Managers Registered nurses Accountants/Auditors Computer specialists Teachers</i>	56% <i>Teachers Registered nurses Managers Accountants/Auditors Lawyers</i>
Percent Underemployed		0%	39%	70%	44%

The results from this analysis of Clark County's labor force, as shown through Table 6, present evidence that many of the more educated workers in Clark County are unable to find high-quality jobs. In other words, there is a mismatch between the skills which many workers bring to the labor market and the type of jobs which these workers eventually accept. Thus, while unemployment has fallen and the county has seen an impressive number of jobs created since the Great Recession, the quality of the labor market remains one of the foremost economic development challenges for Clark County. Developing the industries, workforce, and institutional environment that create higher-quality jobs should therefore be one of the key objectives as the county seeks to revive and restructure its economy.

Innovation & Entrepreneurship

Economic diversification has been a priority for Nevada, and more so for Southern Nevada, since the Great Recession. To drive this diversification, local and state officials have sought to incentivize and encourage growth in high-skill, high-wage industries. These industries rely on a strong local network comprised of qualified individuals and organizations that conduct a high level of innovation and research and development (R&D) activities.

To understand a region's ability to support innovation-intensive industries and businesses, the number of individuals with backgrounds in science and engineering (S&E) has been a useful metric. While the state has made some progress in recent years, Nevada has historically struggled to produce individuals with these qualifications for S&E-intensive industries (Table 7). Though S&E occupations have increased their share of the state's workforce, overall S&E attainment remains low. The relatively unchanged ranking of Nevada in national league tables since the Great Recession hints at the existence of barriers for S&E workforce training and development in the state.²

While these data represent Nevada as a whole, the trends can also be observed in Clark County. At UNLV, the number of awards conferred in S&E and S&E-related fields remains low when compared to those conferred in the social sciences and business management.³ This trend is generally repeated at Clark County's other higher education institutions, such as Nevada State College (NSC) and the College of Southern Nevada (CSN).

Nevada Continues to Underperform in S&E Fields, Slowing Efforts to Grow the State's Innovation Economy

Table 7: Nevada Values and Rankings for Selected Science and Engineering Indicators. Source: National Science Board. 2020. Science and Engineering Indicators 2018, State Indicators (NSC-2018-1). Notes: The Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) programs are federal programs aimed at increasing small businesses' share of U.S. innovation activity in the private sector.

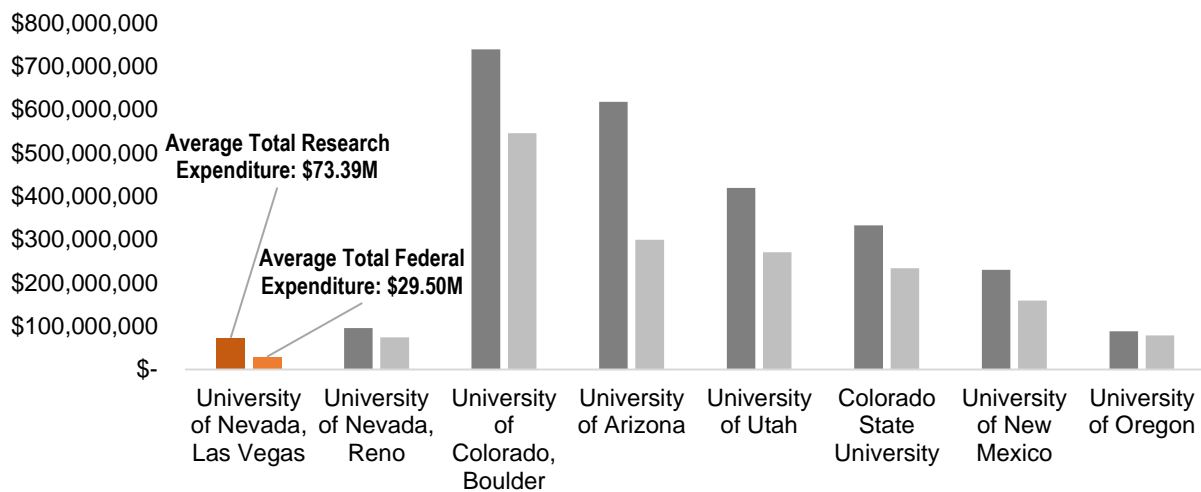
Indicator	2010	Rank	2018 (or most recent year)	Rank
S&E Bachelor's Degrees Conferred per 1,000 Individuals 18-24 Years Old	8.50	50	12.78	50
S&E Occupations as a Percentage of All Occupations	2.41	47	2.43	44
R&D as a Percentage of GDP	0.76	45	0.54 (2017)	50
Business R&D as a Percentage of Private Industry Output	0.65	37	0.45 (2017)	43
Average Annual SBIR and STTR Funding per \$1 Million GDP	44.39 (2010-2012 avg.)	44	35.17 (2014-2016 avg.)	42
Venture Capital Disbursed per \$1 Million GDP	232.12	38	469.53	36

The low S&E achievement in Nevada's workforce has downstream impacts on the state's economy. At a high level, a disproportionately small S&E workforce limits the ability for the state to diversify into industries that require individuals with S&E qualifications. Conversely, the absence of a dynamic portfolio of S&E-intensive industries and firms lessens the attractiveness of the state for those with S&E qualifications as there are fewer options for employment. Both of these forces have spillover

effects; for example, spending on R&D has slid in recent years, with Nevada’s R&D spending as a percentage of GDP falling between 2010 and 2017, and Nevadan business R&D spending also falling. At the local level in Clark County, the low R&D performance can be seen in the subdued spending on research at UNLV (Figure 11 below). Compared to universities in peer metro areas, UNLV’s research expenditure remains very low, as does its share of federal research funding.

UNLV’s Research Spending Remains Low among Peer Universities

Figure 11: Average Total Research Expenditure and Average Total Federal Research Expenditure, by Selected University, 2010-2018. Source: Association for University Technology Managers (AUTM), Statistics Access for Technology Transfer (STAT) Database. Note: Data are in U.S. dollars. Data are not available for all universities for all years. University of Nevada, Las Vegas data are unavailable for the 2010-2015 period. University of Nevada, Reno data are unavailable for 2014. University of Utah data are unavailable for 2016.



As low levels of research funding result in less research and innovation activities, so too does it hinder a university’s ability to produce intellectual property, such as patents and licenses. Table 8 below provides data on patent and licensing activity at UNLV and its peer universities. Though UNLV outperforms University of Nevada, Reno (UNR) in the selected metrics, both universities significantly underperform as compared to their peers.

Patenting and Licensing Activity at UNLV Has Room to Grow

Table 8: Patent and Licensing Activity, by Selected University, Averaged over 2010-2018. Source: Association for University Technology Managers (AUTM), Statistics Access for Technology (STAT) Database. Note: Universities are ranked in descending order by Patent Applications. Data are averaged for the years 2010-2018. Data are not available for all universities for all years. University of Nevada, Las Vegas data are unavailable for the 2010-2015 period. University of Nevada, Reno data are unavailable for 2014. University of Utah data are unavailable for 2016.

	Number of Licenses	Gross Licensing Income	Invention Disclosures	Patent Applications	Startups Formed
University of Colorado, Boulder	39	\$8,393,456	219	284	9
University of Arizona	60	\$1,935,155	195	99	10
University of New Mexico	14	\$2,046,032	118	94	9
University of Utah	65	\$37,972,787	207	91	16

	Number of Licenses	Gross Licensing Income	Invention Disclosures	Patent Applications	Startups Formed
Colorado State University	29	\$2,010,717	110	50	5
University of Nevada, Las Vegas	7	\$301,966	52	18	2
University of Nevada, Reno	3	\$189,465	23	12	1
University of Oregon	166	\$8,122,021	34	11	2

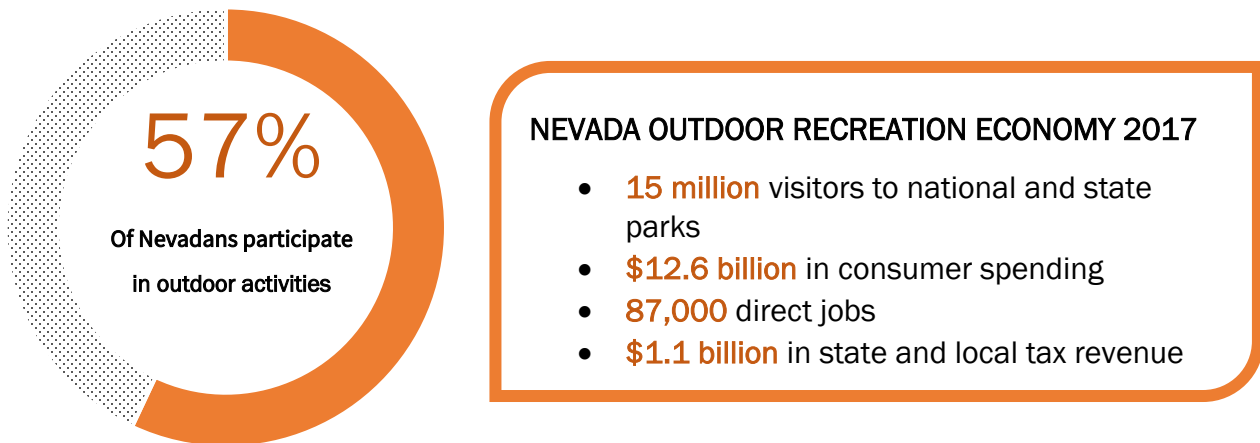
The above statistics are not to say that Southern Nevada and UNLV have not made progress in recent years. Progress has been made on increasing startups' access to funding, with venture capital funding more than doubling between 2010 and 2018 (Table 7). The availability of funding remains a critical component for entrepreneurship and helps to reduce the barriers to entry for young firms. Continuing to increase funding availability and ensuring these funding opportunities are available to the diverse range of Clark County entrepreneurs remains highly important for the local innovation ecosystem.

Environment

Clark County falls within one of the most uniquely beautiful and complex environments in the United States. The area, known as the Basin and Range province, is characterized by rugged mountain ranges and wide valleys. In addition, the county is located in the Mojave Desert, which receives less than six inches of rain per year on average and is susceptible to frequent droughts. Because of these conditions, land and water conservation issues are central to community and economic development in the county.

Southern Nevada is home to a variety of outdoor areas that provide residents and visitors alike with recreation and education opportunities. Red Rock Canyon, Valley of Fire, Mount Charleston, Sloan Canyon, and Lake Mead are just a few of the special resources of the region.⁴ Las Vegas provides an excellent hub for international visitors interested in regional attractions as well, including Death Valley, the Grand Canyon, and Joshua Tree National Park. Hiking, climbing, shooting, and horseback riding are all extremely popular activities in the area.

Within Clark County, Lake Mead National Recreation Area welcomed 7.5 million visitors to the park in 2019, who spent an estimated \$336 million dollars in local gateway regions, supporting a total of 3,980 jobs⁵. In March-April 2020, as much of the state was shutting down due to the COVID-19 public health emergency, the Bureau of Land Management (BLM) and the Las Vegas Metropolitan Police Department saw a 400% increase in visitors to BLM and other public lands such as Red Rock National Conservation area, despite "Stay at Home" orders.⁶ The increase in visitors has caused strain on the infrastructure and the abilities of the federal land managers to tamp down on illegal activities.



Clark County, in cooperation with the Southern Nevada Regional Planning Coalition and municipal government agencies, has built around 74 miles of multi-use trails, 34 miles of equestrian trails, 10 pedestrian bridges, and 15 trailheads and waysides.⁷ These amenities connect residents and visitors to parks, schools, workplaces, and natural areas while reducing traffic and improving air quality.

The Southern Nevada Health District currently hosts a trail finder tool called “Neon to Nature” which includes an interactive map of the trails and outdoor amenities in the county. Trails have become extremely popular throughout the county as socially distant activities have become essential. Several trails are in the works, including the Vegas Valley Rim Trail which would connect disparate trails around the Valley into one large loop.

The Bureau of Land Management administers much of the land in the county (see Figure 19 in Appendix C). The Southern Nevada Public Land Management Act (SNPLMA) allows the BLM to sell public lands within a set disposal boundary. Revenue from these sales go to the Nevada General Education Fund, the Southern Nevada Water Authority, and the Secretary of Interior’s special account for various conservation and capital improvement programs.⁸ As a result, most of the municipalities are “landlocked”—surrounded by lands they cannot develop. With input from various stakeholder groups, Clark County proposed the Southern Nevada Economic Development and Conservation Act (also known as the Lands Bill) in 2018. This bill would expand lands available for the county to dispose of for development. These include lands which stretch south along I-15 and in areas surrounding Henderson. Early in 2020, Nevada State Senator Cortez Masto released a discussion draft of the bill that maps out an additional 308,110 acres of public land to be protected as wilderness and expands the border Red Rock Canyon National Conservation Area by 69,201 acres.

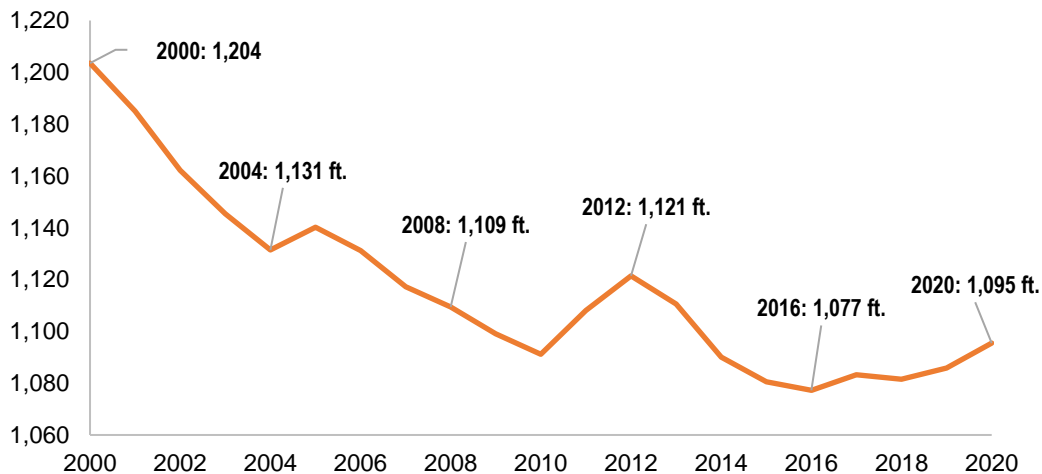
Southern Nevada is home to a variety of delicate ecosystems. The county itself administers the Desert Conservation Program and the Multiple Species Habitat Conservation Plan (MSHCP), which streamlines the process for developers to comply with the Endangered Species Act. The Plan expires in 2031 or when 145,000 acres have been disturbed. Some funds from the sale of public lands under SNPLA goes towards funding the MSHCP.

In addition to habitat conservation, water conservation is highly important to the continued development of the county. 90% of the drinking water supply is sourced from the Colorado River,

diverted at Lake Mead. Outlying rural communities in the county rely almost entirely on groundwater resources pumped from the aquifer, which accounts for the other 10%. Clark County lies within a region that is most at risk from the effects of climate change, including rising temperatures and decreased precipitation. While susceptible to droughts, the county is also prone to flash flooding events. Continued access to dwindling water resources is a pressing question for the entire Southwest, especially those areas that rely on the Colorado River and Lake Mead for their drinking water (see Figure 12).

Lake Mead Water Levels Have Fallen over Time

Figure 12: Average Water Levels in Lake Mead Reservoir (in feet), 2000-2020. Source: U.S. Bureau of Reclamation.



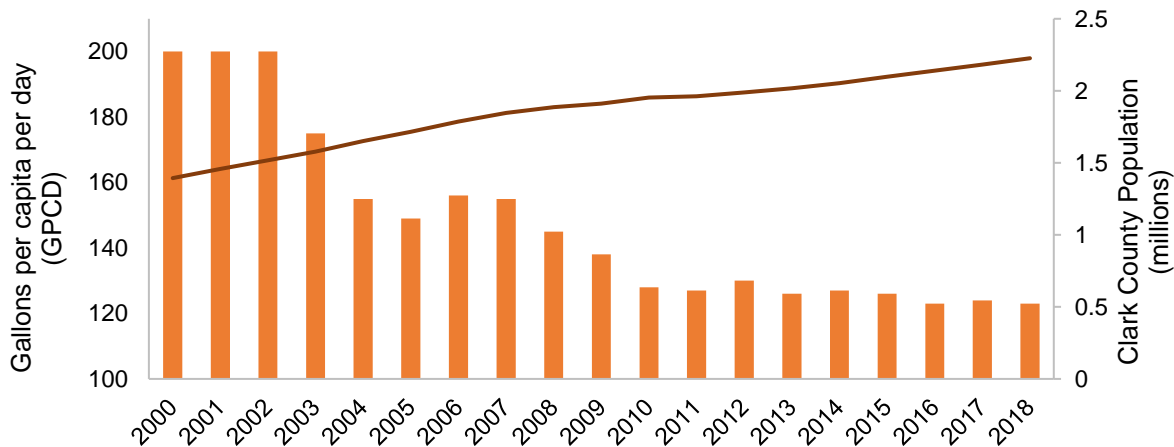
The Southern Nevada Water Authority (SNWA) is a regional water authority made up of seven local water and wastewater agencies. SNWA is responsible for water treatment and delivery to individual water providers, as well as the acquisition and management of water resources in Southern Nevada. SNWA has implemented an innovative approach to water conservation, promoting “return-flow credits” where member agencies treat and return wastewater to Lake Mead to obtain water credits⁹.

Various water conservation programs—such as the Smart Water Landscape Rebate—have allowed the county to reduce water usage despite population growth (see Figure 13). Since 2015, SNWA has produced annual long-term planning scenarios as part of its 50-year water resource plan. These scenarios consider climate change, drought, and other impacts to project future supply and demand needs under various economic and population growth conditions. The SNWA’s successes serve as a point of pride for the county, and further innovation around water and landscape conservation could set a precedent for the region.

Several regional water authorities, including SNWA, have leveraged their connections with private industry and the University of Nevada Desert Research Institute to create WaterStart. This incubator brings together the expertise and infrastructure of various organizations to provide innovative water services to water management agencies, policy makers, and tech companies to stimulate economic growth in the water sector.

Clark County Water Use Has Decreased over Time despite Increasing Population

Figure 13: Water Use in Gallons Per Capita Per Day Compared to Population Growth, 2000-2018. Source: Southern Nevada Water Authority; U.S. Census Bureau.



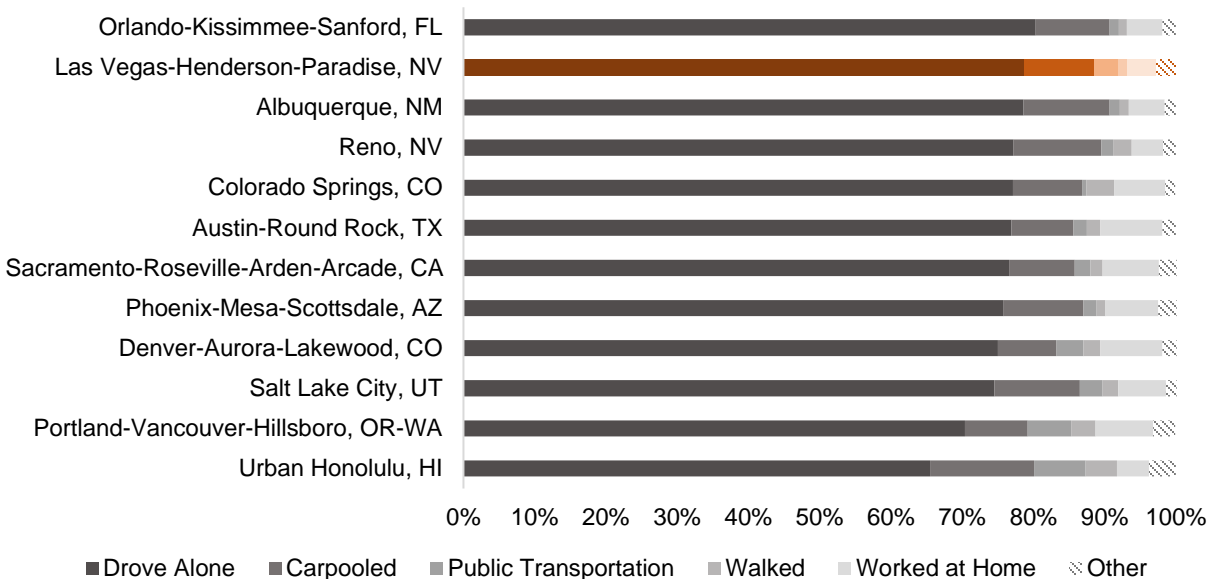
While Southern Nevada has excelled in water conservation, it has also worked hard to provide residents and visitors with improved air quality. Carbon monoxide has declined 84% since 1982, ozone has been reduced by 12% since 2007, and particulate matter (<2.5µm) has been cut in half since 2001. Type and amounts of pollutants, weather, and local topography all combine to affect air quality in the county. The Las Vegas Valley is surrounded by mountains that rise thousands of feet over the valley floor. These trap stagnant air and make quality control a complex task. Not only that, but the county is vulnerable to outside events—such as wildfires in California and elsewhere—that can diminish the quality of air.

Infrastructure & Energy

The most densely populated area of the county is the Las Vegas Valley—home to the cities of Las Vegas, North Las Vegas, Henderson, and a large section of unincorporated Clark County that includes the McCarran International Airport and the Las Vegas Strip. The valley presents a challenging area for growth, as it is ringed by environmentally sensitive, federally owned lands managed by the Bureau of Land Management, the State of Nevada, and the U.S. Military. Outside of the valley, incorporated and unincorporated micropolitan areas include Mesquite, Boulder City, and Laughlin.

Driving Alone Continues to Be the Preferred Method of Transportation among Clark County Workers

Figure 14: Worker Commuting Patterns, by MSA, 2018. Source: 2018 American Community Survey 1-Year Estimates.



Clark County is heavily reliant on cars, with 90% of Clark County residents reporting that they drive to work with an average travel time of 25 minutes¹⁰ (see Figure 14). While the condition of roads in the county is overall fair to good, greater connectivity is needed to support a growing and diversifying population.⁹ Much of the land within the Las Vegas Valley has been developed as single family residential, with commercial and mixed use corridors running along major roads such as U.S. 95 and I-15.¹¹ The reliance on cars and single-family homes leads to urban sprawl that pushes against the borders of federally managed lands that ring the valley.

In recent years, there has been elevated interest in mixed-use and transit-oriented developments within the county, including the Maryland Parkway TOD and the Reimagine Boulder Highway Project. To serve the growing and diverse population, continued engagement with these projects is essential. The Regional Transportation Commission (RTC), in collaboration with Clark County and its cities, develops region-wide transportation plans for Southern Nevada. The most recent draft plan was released in November 2019 and sets out goals for the next 10 years to tackle issues of connectivity and sprawl.

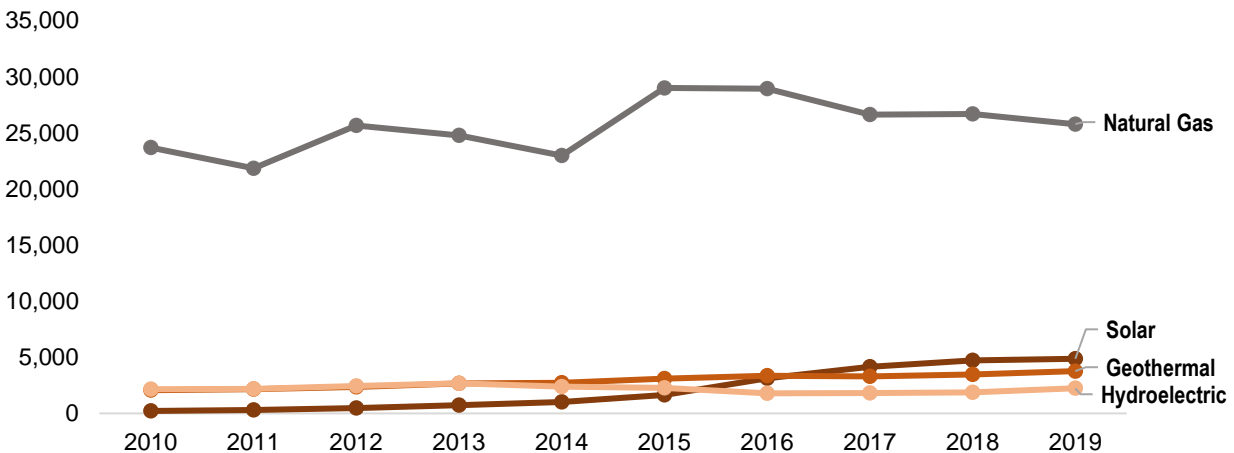
Clark County is home to a system of airports, of which McCarran International Airport is the largest and primary commercial airport for the region. The other airports are reliever and general aviation airports, which include the Henderson Executive Airport, Jean Aviation Sport, North Las Vegas Airport, Mesquite Airport, and Overton Perkins Field. Located in unincorporated Clark County, McCarran International Airport saw 51.5 million total passengers in 2019 and over half of these were deplaned.¹² These numbers suggest that McCarran is an important hub for domestic and international travelers moving through the airport, as well as a major entry point for travelers to attractions within Clark County.

Since McCarran opened in 1948, the airport has been expanded several times to accommodate increasing passenger volume. The most recent expansion was completed in 2012, when Terminal 3

was built to accommodate the rapid growth in domestic and international flights to Las Vegas.¹³ Further modernization projects were completed in 2018. Due to its proximity to urban development, McCarran is constrained by both geographical and airspace limitations. The airport cannot be expanded any further and therefore would not be able to meet future air traffic demands. To meet these future needs, a site for a supplemental commercial airport was identified in 2000 approximately 30 miles south of Las Vegas. The Southern Nevada Supplemental Airport (formerly known as Ivanpah) is proposed to be constructed in the Ivanpah Valley between the cities of Primm and Jean.¹⁴

Solar Energy Is an Increasingly Important Renewable Energy Resource in Southern Nevada

Figure 15: Net Energy Generation in Nevada, by Source (in Thousand MWh), 2010-2019. Source: U.S. Energy Information Administration.



In addition to transportation infrastructure, the energy infrastructure of the county is important to consider. Nevada has substantial solar and geothermal developments but still relies heavily on natural gas (see Figure 15). Renewable sources are supplying an increasing share of Nevada's energy, with solar leading at 12% of the state's utility-scale power and geothermal providing 9%. The Hoover Dam provides another 5% in the form of hydroelectric.¹⁵ In 2019, the Nevada Legislature updated the renewable portfolio standards (RPS) to target 100% electricity sales from clean energy by 2050, with 50% reached by 2030, and redefined hydropower as a renewable energy source when it was previously not included.^{16,17}

While transportation is the leading consumer of energy in the state, Clark County mainly uses energy in the residential and commercial sectors due to the high population concentration in the Las Vegas Valley. Southern Nevada has shown strong environmental leadership in pursuing solar energy projects, with 26 solar and solar storage power plants administered by NV Energy in Clark County (see Figure 20 in Appendix C).

Potential for wind energy is low throughout the state, with some areas located in the southern part of Clark County rated as Fair to Good wind power classification by the National Renewable Energy Lab (see Figure 21 in Appendix C). Two recent wind turbine projects in these areas have been rejected by

the Bureau of Land Management and opposed by local environmental groups and Native American tribes.

In conjunction with the push for sustainable energy sources, several “smart city” projects have emerged to modernize technology utilization throughout the county. In 2017, the City of Las Vegas partnered with Cisco, RTT, and Dell to begin a smart city project to implement smart technologies in traffic, water, transit, waste management, security, and parking.¹⁸ The ultimate goal of these projects is to improve quality of life for residents and enhance the experience of visitors to Las Vegas. The Innovation District, located in downtown, will operate as a proving ground for cutting-edge technologies such as the internet of things—which would connect parking sensors, traffic signals, bike-share stations, and emergency response vehicles.



Mapping the Future

Asset Map

An Analysis of Clark County's
Communities and Economy

Asset Map

While the Economic & Community Assessment examined Clark County's performance on a number of topics, the asset map intends to synthesize the information received from county stakeholders through interviews and, where necessary, use data to elaborate on stakeholder input. This section will discuss the various policies, programs, and initiatives that have taken place in Southern Nevada over the last several years and identify important resources that are at the county's disposal. The major topics to be discussed are:

- Economy
- Business & Regulatory Climate
- Training, Education, & Workforce Development
- Innovation & Entrepreneurship
- Infrastructure
- Community & Recreational Assets
- Environment & Natural Resources

Economy

Industrial Diversification

Over the last decade, Southern Nevada has made great strides in establishing and growing new industries (e.g., health services and logistics). This diversification is intended to lessen Southern Nevada's dependence upon the leisure and hospitality industry, and related sub-industries, while creating new opportunities for individuals from a variety of economic and educational backgrounds. However, it is important to understand that the journey to diversification is measured in years, not months. Southern Nevada's progress is notable, but its continued reliance on traditional powerhouses remains evident.

While the Great Recession signaled to state and local leaders that diversification was necessary, the economic impact of the COVID-19 pandemic has reignited debates about Southern Nevada's economy and the success of diversification efforts thus far. The rise of unemployment to heights not seen since the Great Depression has placed renewed focus on Clark County's diversification strategy.

The last decade has brought an increased level of coordination between state economic development leaders and local governments and agencies, as seen through the strong relationship between GOED and the Las Vegas Global Economic Alliance (LVGEA). This coordination has been an invaluable asset to the region, as it has allowed Southern Nevada to make use of state programs and incentives, including Office of Workforce Innovation (OWINN) funds and various tax abatements, that have enabled greater diversification. Likewise, new programs aimed at entrepreneurship and innovation have allowed for a greater variety of Southern Nevadans to contribute to the diversification of the regional economy.

There do remain opportunities for fine-tuning the region's approach to diversification. Concerns have been raised about the quality of jobs that have been brought to Southern Nevada through diversification efforts. While these jobs are created in industries that are new or emerging in Southern Nevada, the wages and skill levels associated with these jobs remain comparatively low.

This has led some to question the efficacy of the current business recruitment tools employed in Southern Nevada.

Attraction & Retention of a Skilled Workforce

As discussed in the Economic & Community Assessment, Southern Nevada's population has grown significantly. While this growth has been most pronounced for those aged 65 and older, the region has also experienced notable growth in working-age populations, namely those aged 25 to 44 and 45 to 64 (Figure 3). The growth in working-age populations has also been met with an increase in the overall education levels of the region's labor market, with the number of college graduates has increased by over 18% (Figure 10). A dynamic, qualified workforce is a necessity for Clark County's economy, particularly as it looks to shift away from a historical reliance on gaming, tourism, and hospitality.

Despite Southern Nevada's push for diversification, the leisure and hospitality industry does remain a significant pull factor for much of the county's employment and is thus an asset for attracting talent to the region. While employment in this industry is more often lower-skill and lower-wage, the leisure and hospitality industry has begun to attract more high-tech supporting sectors, such as game design, that offer higher paying jobs. Partnerships between the region's higher education institutions and industry—such as Black Fire Innovation,¹⁹ a collaboration between UNLV and Caesars Entertainment aimed at innovations in gaming, hospitality, and entertainment—represent an opportunity for Southern Nevada to use its dominant industry as a foundation for growth in related, yet independent, high-skill high-wage sectors and industries.

Nevertheless, for Southern Nevada's other industries not related to leisure and hospitality, a skilled, qualified workforce remains a formidable obstacle. Though education levels have generally increased among the workforce, many employers in higher-skill, higher-wage industries have difficulty finding qualified workers. Industries that are dependent upon this form of skilled worker—that is, those with a bachelor's degree and above—find it difficult to grow organically in the region. This has led to two trends in Southern Nevada: employers are either required to import qualified workers from other regions of the United States, or residents must move out of the county to find meaningful work.

Business & Regulatory Climate

As with the Nevada state government, Clark County is known as a business-friendly region. Despite some of the constraints the region faces, notably the vast BLM land ownership, local government agencies are known to work together to bring new opportunities to Southern Nevada. Though the COVID-19 pandemic has reshaped how government agencies interact with individuals and businesses, the Clark County permitting and licensing departments have successfully moved their operations online and continue to provide essential services to Clark County businesses.

Though Clark County has continued to perform strongly while enabling business growth and development, there are areas where collaboration could be greater. Clark County is comprised of several municipalities, ranging from highly urbanized to very rural. The diversity of these municipalities means that Clark County has something to offer everyone. Those who want to enjoy nightlife may take up residence in the county's core, while those who are interested in a slower-paced experience may settle in one of the region's smaller communities. However, this diversity among locales has also led to the development of several distinct identities within the county, each with its own interest in attracting businesses and workers to its own jurisdiction. This makes

business attraction and retention a challenge, as municipalities within Clark County may feel more compelled to compete with one another for new business, rather than perceiving business growth and expansion as an overall win for the county.

Competition among local governments is not an inherent weakness in the county. However, pursuing a coordinated approach between city governments and the county government, as well as other economic development actors such as LVGEA, may help to unify the vision for Clark County as an attractive place to live and do business. Strengthening the ties between municipalities, as well as integrating business services and offerings when possible, may better enable the region to attract new businesses.

Training, Education, & Workforce Development

Higher Education and Post-Secondary Training

The presence of an adaptable higher education system that works with K-12 schools and industry partners to develop home-grown talent is crucial. While recruitment efforts by state, county, and city officials seek to bring businesses to Clark County, if a qualified ready-to-work labor force is not already in place, the county will continue to struggle to attract new and diverse businesses.

Clark County has made significant progress in this regard over the last decade. Notably, the University of Nevada Las Vegas (UNLV) attained R1 status, placing it among the nation's most active research universities. As Southern Nevada's flagship higher education institution, UNLV's designation as an R1 university is a critical step in enabling diversified growth in Clark County. As the university produces more research and graduates in a variety of domains, businesses will take notice.

UNLV is not Clark County's only higher education asset, nor is it the only four-year degree-granting institution. Founded in the early 2000s, Nevada State College (NSC) has seen its enrollment nearly double since 2009, reaching almost 5,000 fall enrollments in 2018. NSC plays a vital role in Southern Nevada's healthcare workforce pipeline; of the 567 degrees conferred in 2018, about 45% were in health professions and related programs.²⁰ Since 2009, health professions and related programs have been the most popular degree earned by NSC graduates. These programs remain important to Clark County's healthcare industry and provide a dedicated pipeline to the region's healthcare employers, which have historically suffered from an undersupply of qualified workers. Touro University, a private university dedicated to the training of healthcare professionals in Southern Nevada, also serves a critical role in the development of Clark County's healthcare workforce.

In addition to four-year degree-granting universities, Clark County is served by the College of Southern Nevada (CSN), the region's primary two-year degree-granting public college. CSN has experienced steady enrollment since 2009, though total enrollment has declined by about 12% between 2009 and 2018. A majority of the degrees conferred at CSN are in liberal arts and sciences and business management though health professions, science technologies, and technicians also account for a sizeable portion of the degrees earned.²¹

K-12 Education

Clark County School District (CCSD) is the fifth largest public-school district in the United States. In addition to its size, CCSD has many unique characteristics that present opportunities and challenges for the district and Southern Nevada. Student enrollment at CCSD schools accounts for 75% of

Nevada's total K-12 student enrollment. Of the students attending CCSD schools, 75% come from a minority or multiracial background, with Hispanic/Latinx students accounting for the single largest student group, representing over 46% of the CCSD student body.

As the county's only public K-12 education system, CCSD is an invaluable asset for county residents and businesses, with many notable achievements in advancing student progress over the last several years. For example, the graduation rate surpassed 85% for the 2018-19 academic year, a significant increase from the sub-60% graduation rate for the 2010-11 academic year.²² Overall, however, the district may be considered "spotty," with pockets of high achievement scattered throughout the county, but specific shortcomings that undermine the district's standing. The average ACT composite score for CCSD students (17.54) remains below the state average (17.66) as well as the national average (20.7).²³ Additionally, CCSD's scores on the English Language Arts/Literacy (ELA) and Mathematics Common Core State Standards tests remain below state and national thresholds.²⁴ Underperformance on standardized testing follows students to post-secondary education and may prevent them from moving on to two- or four-year higher education institutions. Remediation rates for CCSD graduates—that is, the rate of students who require additional education or training before enrolling in college-level courses—remain high at the state's higher education institutions (CSN: 67%; UNLV: 36%; UNR: 40%).²⁵

CCSD leadership has actively sought to increase the performance of the region's public schools to better prepare students to enter either the workforce or post-secondary education. Most recently, the CCSD Board of School Trustees approved *Focus: 2024*, the district's five-year strategic plan aimed at increasing student success through a variety of supplementary initiatives. At the learner level, the plan intends to increase student achievement in ELA and Mathematics Common Core State Standards testing and decrease achievement gaps between the district's different ethnicities. District leadership has also made educator efficacy a priority, aiming for 100% of CCSD classrooms to be served by licensed teachers by 2024. In 2019 CCSD partnered with the Clark County Education Association (CCEA) to develop a program to recruit and retain high-quality teachers. Using incentives, the program aims to reduce teacher turnover at underperforming middle schools throughout CCSD.²⁶ Other priorities include aligning the governance and leadership of the district with the needs of the community, ensuring district funding works to achieve equity among all students, and working with parents and the community to provide support to students from all backgrounds.²⁷

An important component of CCSD's recent work to improve student outcomes is to minimize the achievement gap that exists between the district's high- and low-performers. The achievement gap is most apparent when assessing enrollment in higher education based upon ethnicity and geography. For example, in the CCSD class of 2018, students from white and Asian backgrounds were significantly more likely to enroll in higher education, where other ethnicities saw higher education enrollment rates between 39% and 45%. Higher education enrollment was also slightly more pronounced in the region's wealthier neighborhoods, including Summerlin and Henderson, than in working class neighborhoods in North Las Vegas and more rural areas of the Vegas Valley.²⁸

Currently, CCSD's high-performing magnet and career and technical academies (CTAs) face an overrepresentation of certain population groups, notably white and Asian students, and an underrepresentation of others, particularly Black students, compared to these groups' portion of overall district enrollment.²⁹ One way CCSD has sought to close the achievement gap is by lowering the requirements for students of varying backgrounds to enroll in the district's high-performing magnet schools and CTAs. Whereas in the past students were required to meet certain academic standards before admission to one of these programs, many programs have since shifted to admission based on interest and program availability, rather than academic achievement.³⁰ While

certain programs will remain selective based upon academic credentials, particularly STEM programs, many of those geared toward vocational training and education—such as construction technology, health information management, and mechanical technology—have been made available to those with an expressed interest.³¹

Students at magnet schools and CTAs have access to several unique programs, including FutuReady, a partnership between CCSD and LVGEA that helps connect students at these schools with internship opportunities at Clark County businesses.³² An important component of these internship programs is demonstrating to students the career pathways that are possible with or without a four-year degree. Outside of the magnet schools and CTAs, CCSD entered into an agreement with the Nevada System for Higher Education (NSHE) to develop a strategic partnership for college and career readiness.³³ Focusing on the district's high schools, the CCSD–NSHE program aims to increase collaboration between CCSD, NSHE, and workforce development institutions in Southern Nevada, with the intention of increasing student participation in dual-enrollment courses and other workforce development opportunities. Programs such as these will continue to be important for Clark County as local governments pursue economic diversification in the medium and long term.

Innovation & Entrepreneurship

In its efforts to diversify the regional economy, Clark County and its municipal counterparts have actively sought to attract and retain firms and industries that conduct a high level of innovation activities. The data generally support this transition: Clark County has seen growth in non-traditional occupations in the regional economy tied to innovation, like computer systems design (+57%), software publishers (+176%), architectural and structural metals manufacturing (+119%), and management, scientific, and technical consulting services (+78%).

Though Nevada and Southern Nevada have been slow to improve on many innovation metrics, state and local leaders, as well as business leaders, have been adept at putting in place the requisite components for an innovation ecosystem to emerge. As discussed in the Economic & Community Assessment, Nevada's venture funding has increased significantly in recent years. While the state-administered Battle Borne Venture Fund has made a number of investments in Southern Nevada enterprises, UNLV's Rebel Venture Fund (RVF) focuses on locally-grown businesses. A unique component of the RVF is its student-led leadership, which helps Southern Nevada to develop home-grown venture capitalists who, ideally, stay within the region and fill a gap in investor knowledge. RVF student leadership works closely with local venture and angel investors, increasing their knowledge of the venture funding process.³⁴

As the region's preeminent higher education institution, much of Clark County's innovation strength comes from UNLV. In addition to UNLV's recent recognition as an R1 university, the UNLV Troesh Center for Entrepreneurship and Innovation plays a pivotal role in the region's small business development efforts, providing degreed and non-degreed training to the region's entrepreneurs.³⁵ The Troesh Center is also a participant in the National Science Foundation's I-Corps program, receiving a three-year \$255,000 grant to incubate 15-25 projects a year. I-Corps teams receive hands-on mentorship in addition to up to \$3,000 in seed funding, with the opportunity to receive additional follow-on funding (between \$5,000 and \$150,000) based upon the team's performance.³⁶ These UNLV programs are pivotal for developing local talent in the innovation ecosystem, a resource Southern Nevada has historically lacked.

The Lee Prize for Innovation and Entrepreneurship, in part administered by UNLV's Lee Business School, challenges innovators to explore unique solutions to the impact of the COVID-19 pandemic on tourism-dependent economies.³⁷ UNLV is also home to the Nevada Institute for Autonomous Systems (NIAS), which is one of six sites designated by the Federal Aviation Administration (FAA) to test unmanned aerial systems (UAS) technologies.³⁸ The NIAS is a critical component of Southern Nevada's emerging UAS industry and provides assistance to UAS companies looking to operate in Nevada.

Local governments and businesses have also worked to grow Southern Nevada's innovation capabilities. The City of Las Vegas established the International Innovation Center @ Vegas (IIC@V) to develop new and emerging technologies that can be used for public purposes, such as the internet of things (IoT) and water sciences.³⁹ Switch's Innovation Center provides entrepreneurial Southern Nevadans with a collaborative workspace to make connections with regional business leaders while "co-locating" in an enabling space.⁴⁰

Infrastructure

Broadband

Clark County's digital connectivity remains a significant asset for the county. According to the Federal Communications Commission (FCC), high speed internet refers to those connections with a minimum download speed of 25 megabits per second (Mbps) and a minimum upload speed of 3Mbps.⁴¹ Using this standard, virtually all of Clark County is covered by high speed internet connectivity with service from at least two providers. However, on average the county's rural residents are provided fewer choices for high speed connectivity; while nearly 98% of urban Clark County residents have varied choices for high speed connectivity, less than 44% of the county's rural residents have at least three choices for connectivity.⁴² This lack of choice in rural areas is compounded by less reliable mobile phone coverage. Many users rely on mobile devices for their connectivity.

While the availability of high-speed internet to county residents is important, differences in subscription patterns among socioeconomic groups are overlooked by these data. Considering different income groups, it becomes apparent that internet subscription behavior among Clark County households varies by income level. For example, while over 94% of Clark County households making more than \$75,000 a year have a broadband internet subscription, only 65% of those making less than \$20,000 a year have a similar subscription. More concerning, though, is the number of low earners who have no internet subscription: nearly 35% of those making less than \$20,000 a year and 15% of those making more than \$20,000 but less than \$75,000 have no service. These two groups account for over 60% of Clark County households, and a lack of connectivity limits their ability to engage with critical county resources, as well as access opportunities for personal and professional development.⁴³

Transportation

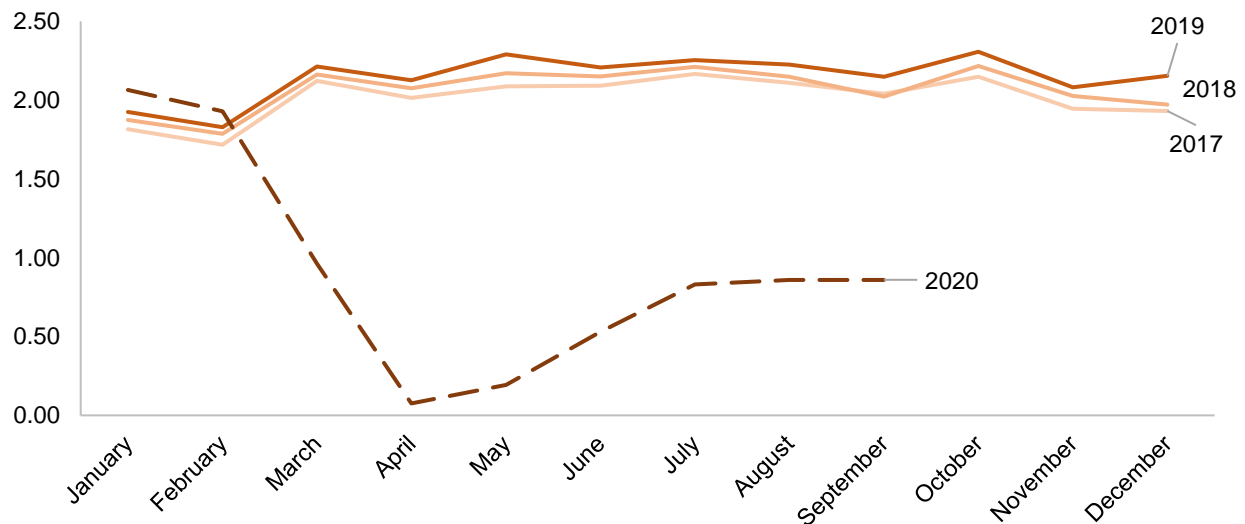
Clark County's central location means that it has easy automobile access to 11 western states and nearly 53 million people. Clark County is easily accessible by car, with Las Vegas, Henderson, and North Las Vegas ranked as having some of the best traffic conditions and road infrastructure among U.S. cities.⁴⁴ Due to these factors, the county is heavily reliant on cars. However, residents of the county are also aware of environmental issues that follow heavy car use and have been quick to adopt electric vehicles to combat pollution. In 2017, Las Vegas saw the highest growth in sales of electric vehicles (EV) in the United States and 2,200 EV were registered in Clark County alone.⁴⁵ The

state has been strongly supportive and subsidized EV charging stations along U.S. Route 95 to create an “Electric Highway” from Reno to Las Vegas, with plans to expand the program regionally to Arizona. Nevada also recently launched new incentives as part of Nevada Energy’s (NVE) Electric Vehicle Infrastructure Demonstration (EVID) program to accelerate the adoption of EV and charging stations across the state.⁴⁶

In addition to local and regional transportation, McCarran International Airport serves as an important hub for domestic and international visitors who visit for gaming, conferences, and outdoor recreation. The number of passengers stopping at the airport has increased over the last several years, only dropping off due to the COVID-19 pandemic (see Figure 16). With easy access to entertainment and hospitality on the Strip, McCarran has non-stop international service to many countries as well as to all major economic and population centers throughout the United States.

McCarran International Airport Passengers Increased until COVID-19

Figure 16: Deplaned Passengers at McCarran International Airport, January 2017 through May 2020 (in millions). Source: Clark County Department of Aviation Statistics.



Since 2000, the location for a supplemental commercial airport has been preserved to address the increasing number of passengers at McCarran International Airport and meet future air traffic demands. Located east of I-15 between Primm and Jean, approximately 30 miles south of Las Vegas, the Southern Nevada Supplemental Airport would connect with McCarran International Airport as well as other areas within the region. In fall 2018, the project planning for the Southern Nevada Supplemental Airport environmental impact statement resumed.⁴⁷

Southern Nevada has explored and embraced innovative solutions to the region’s ground transportation challenges. Planned projects include Bus Rapid Transit (BRT) and the Maryland Parkway Transit-Oriented Development (TOD), which would create a dense, mixed-use area that would promote economic diversity and competitiveness while reducing traffic. Plans to expand transit services to maximize access to jobs and housing would partner with companies like Uber and Lyft. The Boring Company completed the second of two tunnels underneath the Las Vegas Convention Center in May 2020, entering the next phase of the development of the underground people-mover billed as the Convention Center Loop.⁴⁸ Though the early phases of the loop will be

human-operated, the system will move toward full automation with the capacity to move 4,400 convention-goers an hour, with the potential to expand services throughout downtown Las Vegas and, eventually, into surrounding suburbs.⁴⁹

Other alternative transportation options available in Southern Nevada include buses, bicycles, and a Las Vegas Monorail. In 2017, the bus system in Clark County served more than 64 million passengers, with around 19% of those representing visitors to the resort corridor.⁵⁰ During the early months of the COVID-19 pandemic, visits to transit stations in Nevada dropped by 50–60%⁵¹ while ridership on RTC shared bicycles nearly doubled.⁵²

Regional rail networks are often discussed, with past plans including the California-Nevada Interstate Maglev, the Tesla/SpaceX Hyperloop, and expansion of the existing Amtrak rail lines, although all have been abandoned. The most recent project, XpressWest by Brightline, plans to begin construction in 2020 on a high-speed rail line running non-stop between Victorville, California and Las Vegas partially along I-15.⁵³

Outside of the Las Vegas Valley, the opportunity exists to create an industrial transportation hub known as an inland port. Inland ports are defined as hubs that act as internal distribution networks within a nation.⁵⁴ They have infrastructure to support shipping, usually in the form of rail, truck, and air, as well as facilities that can handle and sort large volumes of freight. An inland port can attract industry to an area by lowering the cost of shipping freight to the transfer point where it will be shipped either nationally or internationally. A report on the viability of an inland port in Southern Nevada was produced in 2012, and the Nevada Department of Transportation further discussed opportunities in their 2016 statewide freight plan. Sites near Laughlin and the Ivanpah Valley were strongly considered, in addition to areas within the Las Vegas Valley near Henderson and North Las Vegas. While Southern Nevada has long been a strong importer, an inland port could expand industry in the region and bolster access to West Coast markets in Southern California.

Community & Recreational Assets

Housing

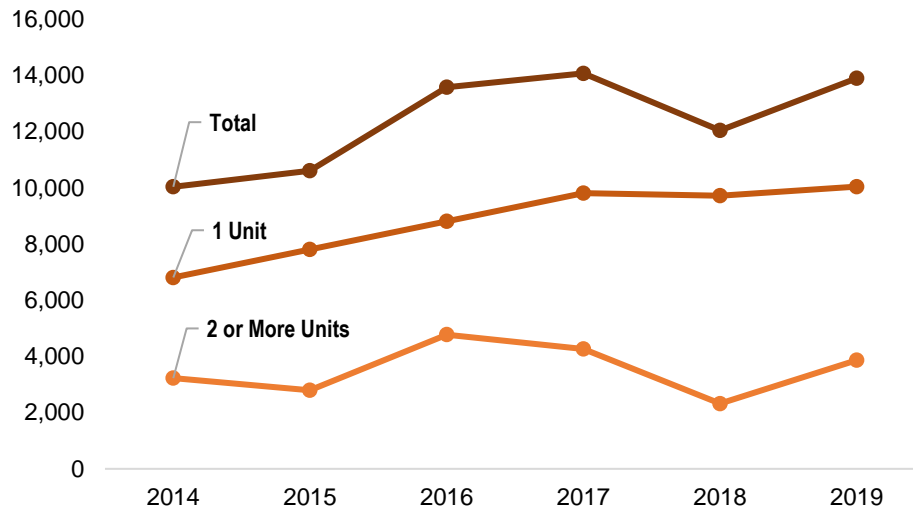
Clark County's housing market was among the country's most depressed following the Great Recession. By September 2011, the median sale price for a home in the Las Vegas metro area had fallen to \$105,000, and by March 2012 the median home value bottomed out at \$128,100. Las Vegas also led the nation in foreclosures. However, the high level of growth in Clark County's population, fueled by an impressive economic recovery and expansion, has driven an increase in home values and sale prices. According to Zillow's estimates for home values in the Las Vegas-Henderson-Paradise metro area, the median home value reached \$295,500 in March 2020, a 97% increase since March 2012, and the median sale price reached \$291,200, a 130% increase since September 2011.⁵⁵ Despite this increase, Clark County's relative affordability remains a significant asset for the region as it continues to grow.

To enable continued population growth in the Las Vegas metro area, new residential housing will be necessary. Southern Nevada has seen consistent growth in the number of new housing units authorized for development over the last several years, with the number of authorized developments increasing by more than 38% between 2014 and 2019 (Figure 17 below). Most of these units were single-family homes (one-unit homes), which have represented about 71% of the annual authorized housing units per year since 2014. Multi-family homes (two or more-unit homes), however, have

experienced less consistent growth. Between 2014 and 2019, these properties accounted for about 29% of annual authorized housing units in Southern Nevada.⁵⁶

Single Family Homes Continue to Be the Top Choice for Residential Construction in Clark County

Figure 17: New Privately Owned Housing Units Authorized in the Las Vegas-Henderson-Paradise Metropolitan Statistical Area, 2014-2019. Source: U.S. Census Bureau, Building Permits Survey. Note: The data for “2 or More Units” represent the sums of authorized housing units for 2-unit, 3- and 4-unit, and 5 or more-unit properties.



Given the continued dominance of single-family housing in Southern Nevada, understanding the affordability of these builds is necessary to determine how the local housing market meets the needs of Southern Nevada’s various socioeconomic groups. The housing affordability index (HAI) uses local income and home price data to determine if the typical household in a given real estate market earns enough income to afford the typically priced home in that market. Among its peers, the Las Vegas metro area is comparatively affordable, with most households able to afford a home in the metro area. This affordability is a considerable asset for the region, especially when compared to the high costs of its coastal neighbors. Note, though, that Las Vegas’ affordability has decreased in recent years, indicating that the average income and average home price in the region are beginning to diverge.⁵⁷

Housing Remains Comparatively Affordable in Clark County, Though Trends Suggest an Increase in Cost

Table 9: Housing Affordability Index, by Selected Metro Area, 2018. Source: National Association of Realtors (NAR).

	2018	Percent Change 2017-2018	Rank
Albuquerque, NM	162.4	-9.3	1
Austin-Round Rock, TX	152.6	-9.2	2
Phoenix-Mesa-Scottsdale, AZ	141.2	-12.1	3
Salt Lake City, UT	129.3	-10.4	4
Colorado Springs, CO	128.1	-13.3	5

	2018	Percent Change 2017-2018	Rank
Orlando-Kissimmee-Sanford, FL	124.1	-12.4	6
Las Vegas-Henderson-Paradise, NV	120.0	-14.6	7
Sacramento—Roseville—Arden-Arcade, CA	116.2	-10.5	8
Portland-Vancouver-Hillsboro, OR-WA	114.0	-7.3	9
Denver-Aurora-Lakewood, CO	109.2	-11.1	10
Reno, NV	101.6	-13.5	11
Urban Honolulu, HI	61.9	-9.4	12

The declining affordability of property in Southern Nevada can be seen in the average pricing for new and existing single-family homes in the area. The Housing Data and Index Project (HDIP), a joint initiative of UNLV's Lied Center for Real Estate and the State of Nevada's Department of Business and Industry, tracks monthly housing trends in Southern Nevada. According to data collected by the HDIP, the average sale price for a newly built single-family home in Clark County in April 2014 was under \$300,000; however, by April 2020, that price had increased to over \$575,000, an increase of nearly 95% in six years.⁵⁸ Existing single family homes have also seen their prices soar in recent years. Whereas in April 2014 the average existing home would have sold for under \$200,000, in April 2020 that price had increased to more than \$370,000, an increase of nearly 89%.⁵⁹ Given that single family homes account for the vast majority of housing stock in Southern Nevada, an increase in price that outpaces income growth will eventually result in a glut of high-priced housing that is unattainable for many county residents.

Health

The healthcare industry has been a priority for growth in Southern Nevada over the last several years. The attention the industry has received has resulted in some notable wins, such as the establishment of the School of Medicine at UNLV. In addition to the healthcare training programs present at other post-secondary institutions in Southern Nevada, the UNLV School of Medicine will serve as a vital pipeline for healthcare workforce development for the region and the state.

Southern Nevada's dedication to developing the healthcare industry stems from a historical underperformance of healthcare in the county, and indeed the state. According to the Southern Nevada Health District's (SNHD) 2019 Community Health Needs Assessment, healthcare access remains a critical challenge for the region. Specifically, the high cost of care, the lack of healthcare coverage, and the lack of available medical providers have pervaded the healthcare industry in Southern Nevada (Table 10).⁶⁰

Healthcare Access Continues to be a Challenge for Southern Nevada

Table 10: Healthcare Indicators for Clark County, Nevada, and the United States. Source: Southern Nevada Health District. Note: Data availability varies by year. The latest year of availability for each indicator is indicated in parenthesis.

	Percent of Adult Population Uninsured (%) (2019)	Percent of Population without a Personal Healthcare Provider (%) (2019)	Number of Medical Professionals per 100,000 Population (2016)
Clark County	21.55	36.20	237
Nevada	19.42	33.75	246
United States	14.73	22.45	288

The Association of American Medical Colleges (AAMC) collects data on states' physician workforces and publishes a state-level profile on an annual basis. Though collected at the state level, these data may be used to determine trends in physician workforce preparedness and availability for Clark County as the county accounts for a significant portion of the state's total population. In the AAMC's 2019 Nevada Physician Workforce Profile, Nevada ranks in the bottom five nationally in all measures of physician supply—including active physicians per 100,000 population (rank 45) and active primary care physicians per 100,000 population (rank 48)—except for the percentage of active physicians who are female (rank 44), percentage of active physicians who are international medical graduates (rank 8), and percentage of active physicians who are age 60 or older (rank 38).⁶¹ The latter two of these metrics hint at the state's heavy dependence upon an imported and aging physician workforce, with 27% of the state's active physicians being international medical graduates and nearly 30% being at least 60 years old.⁶²

Nevada's rankings related to physician workforce development are a mixed bag. Nevada ranks quite well (rank 16) regarding the percentage of undergraduate medical students (UME) that matriculate from in-state, with 73% of UME's coming from Nevada. Likewise, in recent years the number of medical residents and fellows enrolled in programs accredited by the Accreditation Council for Graduate Medical Education (ACGME) has increased over 150%, though international medical graduates still account for 26% of the medical residents enrolled in these programs. Nevertheless, in-state enrollment in resident or fellowship programs remains very low in Nevada, with just over 21 individuals enrolled in ACGME programs for every 100,000 population (rank 44). A bright spot is Nevada's ability to retain many of the physicians trained in-state to work at Nevada's medical institutions, with nearly 77% of students enrolled in undergraduate and graduate medical education (UME and GME) in Nevada choosing to practice in Nevada (rank 9).⁶³

The AAMC's data further indicate that physicians who complete their graduate medical education (GME) (e.g., residency or fellowship) in Nevada are more likely to practice in Nevada; 55% of those physicians who completed their GME in Nevada wound up practicing in-state. Even given this majority, 17% of physicians who completed their GME in Nevada decided to practice in California. The next most common state for Nevada-trained physicians to practice in is Washington, which accounted for just 3% of Nevada-trained GME students. The loss of physicians to California is not entirely surprising given the states' proximity to one another but remains a challenge for retaining a qualified physician workforce in Nevada.⁶⁴

In addition to being an opportunity for stable employment in the region, especially as Clark County continues to attract an older population, healthcare access and affordability are critical during the COVID-19 pandemic. A well-developed local healthcare industry capable of handling a growing number of illnesses without regressing to crisis standards of care is important. This requires not only a greater number of trained medical professionals, but also more strategic locations for medical facilities. The Las Vegas Medical District (LVMD) represents an opportunity for the establishment of a strong, comprehensive medical district for Southern Nevada. The LVMD contains seven higher education institutions, four hospitals, two imaging centers, and one neurodegenerative disease treatment and research center.⁶⁵ By centralizing the healthcare industry and medical practitioners into a dedicated area, Southern Nevada reduces the burden for many individuals to travel to different locations for treatment.

Outdoor Recreation

Outdoor recreation provides a multitude of economic benefits to the citizens of Clark County. Outdoor areas also promote healthy lifestyles and foster a sense of community. These benefits are especially important during the COVID-19 pandemic, when entertainment, restaurants, and other indoor activities have been unavailable.

Although Clark County is well-situated in a beautiful area with vast public land, it is not well-known as an outdoor recreation destination like many other areas in the American southwest such as Denver, Colorado and Salt Lake City, Utah. Past efforts to market the Strip as “Sin City” with the focus on gambling and indoor entertainment contribute to this lack of awareness.

In addition to federal and state park lands, the Las Vegas metro area only contains around three acres of municipal park per thousand residents compared to the national average of ten acres per thousand residents.⁶⁶ This is partially mitigated by the fact that many of the master-planned communities in the county contain hundreds of acres of privately-owned and maintained facilities, including golf courses and equestrian trails. Although many of these are free for public use, such as parks and trails in the Summerlin community, lack of access to parks within walking distance in less affluent communities creates what the American Society of Civil Engineers calls “park deserts” (see Figure 22 in Appendix C). While residents have ample access to federal lands, the importance of small local parks to create a sense of place and community must not be overlooked. Southern Nevada is home to a diverse community and a diverse business community—but in general—minorities tend to be underrepresented both as visitors to parks and as business owners in the outdoor recreation industry.⁶⁷ Equity is an essential consideration when promoting outdoor recreation, and care must be taken to foster inclusivity on public lands.

Environment & Natural Resources

In addition to natural attractions for outdoor recreation, mineral extraction has always been present in the county, with early gold, silver, and lead mining drawing settlers to the area. Today, large-scale gypsum, limestone, sand, and gravel operations are more important. The success of mining is therefore closely tied to the local construction industry which relies on these materials. Although mining is important statewide, mineral extraction in Clark County employs a relatively small number of people and increasing automation likely will further reduce that workforce.

Solar assets are also important resources for the county. With 26 solar power plants already in place and several planned, the county is poised to take advantage of its abundant sunshine. However, solar has the major disadvantage of not producing power at night, and large fields of solar panels can be controversial to rural residents.⁶⁸ Diversification of resources through emerging and developing technologies such as storage⁶⁹, enhanced geothermal⁷⁰, and hybridized power plants (such as the Stillwater Triple Power Plant in use since 2012)⁷¹ are essential to meet the needs of residents and the renewables requirements of the State of Nevada.



Mapping the Future

SWOT Analysis

An Analysis of Clark County's
Communities and Economy

SWOT Analysis

The ability to foresee change and analyze current capacity to handle change not only increases the resiliency of an organization during times of economic turmoil, but also assists an organization in capitalizing on opportunities during times of growth. In the 1960s and '70s, a team of researchers at SRI undertook the monumental effort of creating a blueprint for this process. In order to create this guide, researchers surveyed thousands of organizations and executives to best understand how organizations were managing perceived changes to their industries, and how change management could be improved. Their findings led to what eventually came to be known as the SWOT analysis.

Strength refers to what is satisfactory in the present (internal).

Weakness refers to what is currently unsatisfactory (internal).

Opportunity is an emerging trend that presents a chance for growth (external).

Threat is an emerging trend that presents an obstacle for growth (external).

A SWOT analysis enables organizations to assess their current capabilities and understand how to work with them in order to navigate future uncertainty. This powerful analysis serves as the basis for an organization's strategy and highlights sources of strength on which to rely, weakness that may be addressed, opportunities to be realized, and dangers and difficulties to be avoided or addressed. These elements—in the case of Clark County today—are summarized in this section. The strengths, weaknesses, opportunities, and threats identified below are directly attributable to the qualities and characteristics of Clark County identified in the Community & Economic Assessment and Asset Map above.

Strengths

Strengths: Community & Quality of Life

The presence of a strong hospitality industry in Southern Nevada has nurtured the development of strong recreational assets for Clark County residents and visitors. Residential areas in the region have been centered on the provision of these assets, such as master-planned communities with golf courses, parks, and lakes. Most impressively, Southern Nevada has been able to provide these assets while maintaining comparative affordability among its peer metros and other West Coast metros.

- **Large urban amenities with a small-town feel**
Southern Nevada's history with the leisure and hospitality industry has enabled it to develop a strong culture around entertainment and 24-hour service. As a result, though the region has a comparatively smaller population than some of its peers and larger U.S. metros, residents have access to several amenities that are more typical of larger cities.
- **Comparative affordability**
Despite seeing a rebound in housing prices after the Great Recession, Southern Nevada's cost of living remains competitive among many of its peer and fellow western metro areas. This affordability helps to attract younger workers looking to start their careers, as well as older individuals looking to retire, increasing the dynamism of the region's population.
- **Close-knit communities in a large urban area**
Despite the rapid growth in Clark County's population, local residents have managed to

maintain strong ties with their respective communities. An increasing level of engagement with local amenities has helped residents take pride in their communities and has fostered a greater sense of communal identity in many neighborhoods.

Strengths: Business & Industry

Clark County's world class entertainment and recreation assets draw visitors worldwide and have played an integral role in the region's economic recovery since the Great Recession. They serve as an anchor for numerous regional industries that support the tourism, gaming, and entertainment industry. As the county's economic base, these assets create demand for local businesses, generate tax revenues, and serve as a source of jobs for Clark County residents.

- **Global brand drawing visitors worldwide**
One of Southern Nevada's key strengths is its ability to market a global brand that has been successful at drawing millions of visitors throughout the world. The region's cultural and entertainment assets, combined with its world-class hospitality industry, offer visitors an experience that is difficult to find in other locations. This competitive advantage has helped the region create thousands of jobs since the Great Recession and continues to serve as the region's economic anchor.
- **Business-friendly environment**
Like the state of Nevada, Clark County has maintained a reputation of business-friendliness and an eagerness to "close the deal" with firms relocating to the area. Working with the region's economic development authorities, Clark County has maintained a fairly expedient business licensing process and a great deal of flexibility during the COVID-19 pandemic.

Strengths: Workforce & Education

The region's labor-intensive entertainment and recreation industry attracts many new workers to Clark County, who are inclined to stay once they understand the region's broader offerings. This ability to attract outside workers is supplemented by local colleges' strengths in providing employers with a reliable pipeline of homegrown talent.

- **Attraction of a skilled workforce**
Because Southern Nevada's entertainment and recreation industry is labor-intensive, it creates a significant "pull" factor that attracts workers to the region. The numerous conferences and conventions held in Las Vegas every year, for example, bring in many skilled workers and exposes them to the region's offerings. As a result, the region's ample business and recreation opportunities have fueled a high level of in-migration to Clark County, with many new residents possessing diverse backgrounds, skills, and entrepreneurial pursuits that add to the region's ability to meet the needs of nascent and growing industries.
- **Higher education system complementary to regional strengths**
Clark County's higher education institutions increasingly complement regional employers' needs. UNLV, which recently attained the status of a tier 1 research university, has forged strong partnerships with the area's major casino hotels through its College of Hospitality, while NSC's healthcare and technical programs have provided a reliable workforce pipeline to the county health system.

Strengths: Innovation & Entrepreneurship

Southern Nevada's ecosystem continues to emerge and has shown progress over the last several years. Partnerships between higher education and industry have become more commonplace, and

venture capital has more than doubled. As the components of the regional innovation ecosystem continue to mature, Southern Nevada will become a more competitive place to conduct high-skill, high-wage, and high-tech business.

- **Drive for applied technological innovation**

Over the last decade, Southern Nevada has demonstrated a drive for harnessing new and emerging technologies for economic growth and development. This openness can have a broad impact on economic development as Clark County seeks to diversify from leisure and hospitality toward higher-skill industries.

Strengths: Infrastructure

Clark County's central location provides easy driving access to many cities on the West Coast as well as the Southwest. With strong transportation infrastructure and low traffic, the county is poised to emerge as a transportation hub for the region. In addition, the county has shown leadership in testing and adopting smart technologies to connect and improve the lives of residents.

- **Connection to regional, national, and international destinations**

Clark County's connectivity not only to other southwestern metropolitan areas, but also to metro areas across the United States and the world through McCarran International Airport, continues to be a strength for the region. As a tourism-dependent economy, global connectivity has been a necessity, but as a region seeking to diversify into other industries, such as logistics and advanced manufacturing, regional, national, and global connectivity remain imperative.

- **Broadband accessibility**

Residents of Clark County generally enjoy a competitive broadband market, with most county residents, particularly those in the county's core, having many choices when selecting a broadband service provider. A competitive broadband market helps to maintain affordable prices for high-speed internet, enabling more residents to subscribe to service.

Strengths: Environment

Clark County has shown leadership around environmental conservation despite challenging circumstances. The Southern Nevada Water Authority (SNWA) has implemented an innovative approach to water conservation, with several programs that have reduced water usage in the county despite increasing population. In addition to the SNWA, the county has recently rebranded the Department of Environment and Sustainability which handles questions of sustainable development concerning air quality, land conservation, and species protection.

- **Access to diverse outdoor recreation areas**

Expansive public parklands and multi-use trails within driving distance are a boon for county residents and visitors. Locally, Clark County can boast of beautiful mountains, vast deserts, and long lake shores. Outside of the county, National Parks and Recreation areas, including the Grand Canyon, Death Valley, and Joshua Tree, are within easy driving distance.

- **Streamlined endangered species conservation process for development**

The Clark County Desert Conservation Program and the Multiple Species Habitat Conservation Plan have streamlined the compliance process for developers to meet requirements of the Endangered Species Act. This program allows developers to pay fees to fund conservation programs and establish reserves outside of the development area. This

has allowed the county to develop while also supporting threatened habitats and endangered species.

- **Robust water conservation and management**

Programs and projects that return treated wastewater to Lake Mead and promote native plants and habitats have allowed the county to reduce its water consumption in the face of a rising population. These programs, overseen by SNWA, are a point of pride for the county and allowed continued development in a difficult environment.

Weaknesses

Weaknesses: Community & Quality of Life

Clark County has experienced tremendous population growth in recent years, placing a great deal of strain on the region's social infrastructure. While increasing healthcare access has long been a priority in the region, the county's population growth and the COVID-19 pandemic have moved this challenge to the forefront. A disconnect between the location of much of the region's healthcare assets and the dispersion of the region's population adds additional stressors to the region's healthcare and quality of life.

- **Placemaking and urban development**

Master-planned communities designed around single-family homes have continued to dominate the residential development landscape in Southern Nevada. These properties are increasingly out of range for the region's typical household. A failure to develop denser, more comprehensive neighborhoods risks underutilization of the limited space and resources available in Clark County.

- **Healthcare options and access**

The establishment of the Las Vegas Medical District, anchored by UNLV's new School of Medicine, promises to grow Southern Nevada's healthcare industry. However, the availability of health services to county residents remains a challenge, with a shortage of primary care physicians and specialists to serve Southern Nevadans.

- **Preference for new development over redevelopment**

The growth in Clark County over the last decade has been significant. This growth, however, has been met predominantly by further suburban sprawl in lieu of the rejuvenation of Clark County's established communities. The preference for new construction over the revitalization of existing neighborhoods risks increasing disparities between the region's various population groups.

Weaknesses: Business & Industry

Though Southern Nevada has sought to diversify its economy away from leisure and hospitality, the approach in practice has been fragmented. With several strong, independent municipalities looking to grow their respective local economies, Clark County has seen a range of local priorities that vary widely across jurisdictions, complicating the road to diversification.

- **Fragmentation among local governments**

Clark County is home to diverse communities with their own priorities and constituencies. However, competition between local governments to attract businesses to their jurisdictions has hindered a wholistic approach to economic growth and diversification in the region. As a

result, while prosperity and growth have occurred in some areas of the county, others are increasingly left behind.

- **Slow pace of diversification**

Though economic diversification is measured in decades, Clark County's economy has not demonstrated a notable shift away from the leisure and hospitality industry since the Great Recession. While the foundation for diversification has been laid over the last several years, a continued reliance on the leisure and hospitality industry to drive employment growth in Southern Nevada will subvert efforts to grow employment in other sectors of the economy.

Weaknesses: Workforce & Education

The education and workforce pipelines in Southern Nevada have shown a capacity to adapt to the changing needs of the region's employers. At the K-12 level, strong pockets of excellence exist among the county's magnet and career technical academies. However, as a whole, these systems underperform, impacting the region's efforts to pivot away from low-skill, low-wage jobs.

- **Underprepared high school graduates**

CCSD has made significant strides in recent years to improve student achievement, having recently achieved an 85% graduation rate from regional high schools. The expansion of magnet schools and CTAs represents an opportunity for further workforce development at the high school level. However, local employers continue to cite a lack of certain skillsets, such as soft skills, and education credentials as a hindrance to hiring local talent. Likewise, many graduates of CCSD require remedial education at NSHE institutions prior to enrolling in college-level courses.

- **Job growth in lower-skill, lower-wage occupations**

Clark County's workforce has essentially rebounded from the depths of the Great Recession; however, this rebound remains predominantly within low-skill, low-wage occupations. This has led to an increase in the number of underemployed workers (those working in jobs that are not matched to their education and skill levels). High-wage workers considering a move to Clark County may find it difficult to secure a suitable job for themselves or for their spouse (the trailing spouse problem) due to the relative scarcity of high-quality jobs.

Weaknesses: Innovation & Entrepreneurship

Clark County's innovation ecosystem has matured over the last decade. However, the ecosystem remains in early stages of development, and the region's approach to innovation remains ad hoc. With entrepreneurs who are unsure of the resources at their disposal, Clark County's capacity to make innovation a driver of its economy will remain hampered.

- **Fragmented innovation ecosystem**

Southern Nevada has utilized a piecemeal approach to develop its local innovation ecosystem. This has led to the creation of many different actors within the public and private sectors and academia that have overlapping activities and priorities. For individuals looking to enter this ecosystem, the pathway can be confusing and overwhelming.

- **Gaps within the innovation ecosystem**

Though venture funding has become more available in Southern Nevada, innovation ecosystems require an extensive variety of resources for performance. The absence of strong mentorship and investor networks means many local entrepreneurs must look outside of

Clark County for advice or, in many cases, leave Southern Nevada altogether in pursuit of more developed entrepreneurship ecosystems.

Weaknesses: Infrastructure

Clark County is heavily reliant on cars. The county suffers from low walkability and less alternative transit options than other similar urban areas. While low-density development has always been favored, it is constrained by expansive federal land ownership, especially surrounding the Las Vegas Valley where much of the population is concentrated. In addition, broadband is less accessible for lower income residents. These impediments tend to have the greatest impact on the county's most vulnerable residents.

- **Car-centric transportation infrastructure**
Transportation infrastructure in the county strongly favors car ownership. With relatively few alternative transit options, lower income and elderly residents are less able to easily access services in the county. Local transportation infrastructure related to multimodal options and connections are a weakness that need to be addressed—especially in connecting lower income neighborhoods to local services and employment centers.
- **Low walkability beyond the Strip**
Municipalities throughout Clark County have low walkability. Residents must run errands and access community services mainly by driving, although bus services are becoming more advanced. Walkable neighborhoods promote stronger communities and better health and reduce the impact of cars on the environment.
- **Constrained development potential due to federal land ownership**
The Bureau of Land Management and other federal agencies administer much of the land in the county. The Southern Nevada Public Lands Management Act gives the BLM the ability to sell public lands around a specific boundary surrounding the Las Vegas Valley. As a result, most of the municipalities are essentially landlocked (i.e., surrounded by lands they cannot develop). A bill to expand land for development south along I-15 and around Henderson has been in progress since 2018.
- **Digital divide**
Though broadband is generally accessible to Clark County's population, data show that there is a socioeconomic divide between those with and without a subscription. While Southern Nevada's wealthier population is well-connected, those in lower income groups are far more likely to lack in-home access to broadband services. This divide in digital services is likely to exacerbate existing inequities in Clark County's population.

Weaknesses: Environment

Although Clark County benefits from access to diverse and beautiful parklands, it also faces challenges that arise from these natural areas. The county has active interest groups including environmentalists, developers, and federal land managers who must have their voices heard when it comes to environmental issues. The county must also be especially cognizant of the needs of residents, particularly those in underserved communities, when it comes to outdoor spaces.

- **Complex and sensitive environmental issues**
Clark County is located in the Mojave Desert, an area with a complex set of environmental issues that must always be considered during any development projects. Past environment and development practices have disturbed and continue to disturb the fragile ecosystem.

Dealing with environmental challenges requires cooperation between environmental groups, all levels of government, and industry interests, and can take years.

- **Park deserts**

Certain areas of Clark County suffer from a lack of access to small municipal parks that beautify communities and bring people together. Many parks are concentrated in affluent master-planned communities that privately fund development and maintenance. Although many of these are free for public use, lack of locally accessible parks in less affluent communities creates “park deserts” in the metro area.

Opportunities

Opportunities: Community & Quality of Life

Clark County is poised to create a strong community and enhance the quality of life for its residents. Several opportunities exist to tap into the expertise of its residents, whether they be retirees or young families moving to the area for the lower cost of living.

- **Increasing number of business-savvy retirees**

Over the last decade, Clark County’s 65+ community has been one of the fastest-growing age groups in the region. Possessing decades of professional experience, these individuals represent a unique asset for Southern Nevada, particularly as the region looks to grow its entrepreneurship resources. As this demographic continues to grow in Southern Nevada, so, too, does the opportunity for entrepreneurial mentorship.

Opportunities: Business & Industry

Clark County is well-positioned to exploit several regional advantages which represent significant opportunities for the county to diversify and improve its business environment. The region’s connectedness with other markets—whether through conventions, highways, or airplanes—is a characteristic that has only begun to be explored. Additionally, as the COVID-19 pandemic forces companies and industries to investigate relocating supply chains to the United States, Clark County remains a competitive location for production and distribution.

- **Easy access to West Coast markets**

Clark County’s geographic proximity to southern California presents ample opportunity to develop stronger connections with West Coast markets. As the region continues to diversify its economy into high-tech industries, having suppliers, customers, and prospective businesses within driving distance becomes an increasingly important competitive advantage.

- **Conferences, conventions, and tradeshow as opportunities to attract businesses**

High-profile events such as the Consumer Electronics Tradeshow attract thousands of visitors to Clark County each year, some of whom are eager to explore the potential of doing business in the county. These events are ideal opportunities for the county to educate prospective businesses, workers, and residents on what the region has to offer. It is important to note, however, that this opportunity is heavily predicated upon the return of business travel following the COVID-19 pandemic. While Las Vegas will likely continue to be an attractive destination for high-profile business events, providing the region the opportunity to attract these businesses permanently, it is similarly likely that mid-level events and shows are unlikely to return to pre-pandemic levels.

- **Reshoring of advanced manufacturing industries**

While much U.S. manufacturing has moved overseas in recent decades, the advent of advanced manufacturing in the Southwest region, as evidenced by Tesla's Gigafactory in Northern Nevada and the planned opening of TSMC's silicon chip factory in Arizona, places Clark County at the center of an emerging cluster of advanced manufacturing firms. The county can leverage its proximity to West Coast markets, its role as a logistics hub, and its recreational and natural amenities to position itself as a prime location for high-tech manufacturing.

- **Emerging logistics hub**

Drawing on Las Vegas' world class airport and the rapid growth of its warehouse and transportation support industries, Clark County has emerged as a major logistics center for cross-county freight. The county can utilize its strength in logistics to develop related industries, such as manufacturing, and to explore new logistical applications such as autonomous vehicles.

Opportunities: Workforce & Education

The relative scarcity of high-quality jobs in Clark County has been a deterrent for higher-wage workers considering Clark County as their new home. However, the growing viability of remote work in the wake of COVID-19 presents the county with an opportunity to overcome this problem. Policies which attract residents who can work remotely have been piloted in other cities and could serve as a model for Clark County.

- **Increased opportunity to telework and lower cost of relocation**

Many businesses' successful transition to remote work during the COVID-19 pandemic has demonstrated that many workers do not necessarily need to live close to their workplace. As a result, it is possible for some professional workers, especially those who have difficulty finding employment in Clark County within their chosen fields, to move to Southern Nevada without terminating their jobs elsewhere.

- **Remote worker programs as opportunity to attract high-wage workers**

Local governments across the United States have developed innovative programs to attract mobile workers who can work remotely (e.g., Tulsa Remote, Reno Reconnect, Vermont's Remote Worker Grant Program). Clark County can use these programs as models to develop its own remote work initiative, thereby attracting higher-wage workers who otherwise could not relocate to the county.

- **Availability of innovative workforce programs**

The state of Nevada has been adept at quickly designing and implementing new workforce training and development programs to meet the needs of new and emerging industries. Pursuing mutually beneficial workforce development programs, such as apprenticeships, creates opportunities for Southern Nevada to grow its skilled workforce and attract diverse businesses.

Opportunities: Innovation & Entrepreneurship

Local governments in Southern Nevada have shown a propensity for policy experimentation that enables greater innovation. Maintaining this dedication and openness to innovation, while exploiting geographic resources unique to the area, may better enable Clark County to increase opportunities for local firm innovation.

- **Access to West Coast innovation ecosystem**

Clark County's proximity to western states with innovative economies, such as California and Washington, makes the region an attractive destination for those who are seeking to establish and grow their business without entering the crowded and expensive markets that dominate West Coast states (e.g., San Francisco and Seattle). With short, direct flights to these cities, entrepreneurs in Southern Nevada can quickly access out-of-state resources and networks while remaining local.

- **Technology development and deployment for 21st century cities**

Local governments in Clark County have demonstrated an openness to new and emerging technologies that promise to change the nature and rhythm of cities and their suburbs. As cities across the United States look to deploy these technologies, Southern Nevada is well positioned to serve as a test bed for these technologies, particularly those related to autonomous vehicles, renewable energy, and water conservation. This is particularly true in the age of COVID-19, where public health technologies may be deployed to mitigate the spread of deadly pathogens.

Opportunities: Infrastructure

Clark County has enthusiastically supported several interesting new infrastructure projects to modernize urban areas. The COVID-19 pandemic has revealed other areas on which the city should focus that would best serve residents. Creating mixed-use developments, expanding alternative transit options, and adapting current transportation to be more sustainable are all important goals for the county.

- **Modern and innovative transit**

Clark County has the opportunity to update and improve its infrastructure to support multi-modal transit options and create complete streets through supporting transit-oriented development projects, protecting and developing bike lanes, and expanding bus rapid transit services.

- **Smart city innovation**

Las Vegas, in partnership with several companies, serves as a proving ground for various new and exciting smart technologies in an urban setting. The purpose of this technological innovation is to connect infrastructure, people, and government—creating a city that is more responsive to the needs of the population. Smart city innovation could be an exciting opportunity for communities outside of the Las Vegas core of the county, and opportunities to expand these services to rural Clark County should be considered.

- **Partnerships with local and regional governments to expand resources for electric vehicles**

Clark County residents are unlikely to become car-free in the near future but have shown themselves to be enthusiastic adopters of sustainable alternatives. Electric vehicles (EV) have exploded in popularity over the last several years, and Nevada has been extremely supportive of EV ownership and the infrastructure needed for charging stations. The county has the opportunity to partner with municipal and regional governments to expand EV infrastructure and think of new ways to take advantage of the demand for EV.

Opportunities: Environment

Dominated by the desert landscape, Southern Nevada has excelled at managing its limited water resources and supporting land conservation efforts. This culture of conservation has become

engrained in residents, making it easier for government to enact sustainability measures. The county should harness these attitudes and plan for an uncertain climate future.

- **Expansion and diversification of renewable resource use**
Nevada has a variety of accessible renewable energy resources including abundant solar and strong geothermal. Clark County has seen an explosion of solar farms over the last five years, and opportunities to expand solar and solar storage abound. But every renewable energy resource has its own strengths and weaknesses, and advances in technology and diversification of renewables can be tapped to offset the weaknesses of solar energy.
- **Expansion of innovative water conservation**
The Southern Nevada Water Authority has implemented several innovative water practices to conserve water in the county. With climate change and continued demands for water in the region, the county—in collaboration with other water resources agencies—should be active in pursuing technology innovation in water management, while also being careful to study the effects of new practices on sensitive water resources such as the aquifer and Lake Mead.

Threats

Threats: Community & Quality of Life

Clark County's affordable quality of life has historically made it a competitive alternative for many looking to relocate to or within the western United States. As the region looks to become a mainstream destination for residents as well as visitors, establishing Southern Nevada as a region that can serve all communities and all household types will be increasingly important.

- **Growing disconnect between housing stock and housing needs**
Though Clark County's housing market has rebounded from the depths of the Great Recession, the make-up of new housing construction in the region has increasingly departed from the needs of the typical household. A preference by builders for larger, more expensive homes in master-planned communities is slowly decreasing the region's affordability while limiting the options available for low- and middle-income earners, which account for a significant portion of Southern Nevada's population. Clark County risks losing its comparative affordability with peer regions by continuing to neglect the housing needs of most households.
- **Limited healthcare options and accessibility for many in the region**
Southern Nevada has historically struggled to attract and retain healthcare talent. While progress has been made in recent years to bolster the healthcare workforce development pipelines at the region's higher education institutions, pervasive accessibility issues threaten the development of the region's healthcare industry and hinder public health mediation efforts, especially in the era of COVID-19.
- **"Sin City" reputation**
Las Vegas looms large in marketing for Clark County. Its reputation as "Sin City" where people go to gamble makes it difficult for visitors to recognize the county as a community where people live, work, and raise families. This marketing has been so successful that it overshadows many other aspects of the area and can discourage people from considering the county as a place to settle down despite its affordable cost of living and amenities.

Threats: Business & Industry

Overdependence on tourism exposes Clark County to economic downturns, geopolitical shocks, and changes in consumer discretionary spending. Las Vegas' gaming and entertainment assets also face increased competition from other regions and from online gambling.

- **Exposure to economic shocks**
The dependence of Clark County's economy on tourism makes it highly susceptible to economic downturns, pandemics, and geopolitical shocks. This exposure to macro-level events will likely continue as long as tourism remains the dominant regional industry.
- **Competition from other regions and the threat of online gambling**
In recent years, the regulation of gambling and casinos has been increasingly delegated down to the state and local levels. The decentralization of gambling regulation has encouraged a proliferation of new gaming establishments throughout the United States as well as rapid growth in online gambling, though Las Vegas remains the premier destination for gambling and entertainment. Nevertheless, increased competition from other regions and from online gambling may eventually affect the financial performance of Las Vegas' tourism industry.

Threats: Workforce & Education

COVID-19's long-term economic impact on Clark County is a significant threat to its workforce and economic development objectives. As the pandemic continues to put downward pressure on employment in the county's primary industry, it will become increasingly necessary for the region to actively diversify its workforce.

- **Pervasive medium- to long-term unemployment in dominant industries**
The economic impact of the COVID-19 pandemic has disproportionately affected Clark County's economy. The near-total shutdown of the regional tourism and entertainment industry has furloughed or laid off a substantial portion of the workforce. (The Las Vegas metropolitan area's May unemployment rate is 29%, the third highest in the United States.)⁷² While it is difficult to predict the pandemic's long-term consequences, the possibility exists that the local workforce may not be the same post-pandemic as it had been at the start. This may present new challenges as the county seeks to design its economic and workforce development strategy.
- **Return to office-based work after COVID-19**
Post-pandemic, the return of many workers to office-based work may reduce the appeal and viability of remote work. Because the attraction of new residents who can work remotely is one potential strategy to draw talent to Clark County, a return to office-based work may reduce the pool of workers willing or able to relocate.

Threats: Innovation & Entrepreneurship

As Southern Nevada's regional innovation ecosystem remains in early stages of development, resources from the public sector are vital for continued growth. The COVID-19 pandemic, however, has reoriented many public budgets away from innovation and toward public health and other crisis-mitigation areas.

- **Overdependence on federal funding for local R&D activities**
UNLV remains the region's primary R&D-performing higher education institution and remains relatively dependent upon federal funds to conduct many of these activities. As the COVID-19

pandemic places pressure on state and federal funding for R&D, Southern Nevada may lose a vital source of its research, development, and innovation funding, curtailing the region's efforts to harness innovation for economic development.

- **Dwindling resources for entrepreneurs**

Budgetary pressures are not only relegated to higher education. Local entrepreneurs use federal, state, and local resources, including funding and informational resources, to make critical decisions for their businesses. As governments at all levels look to limit discretionary spending, programs that benefit local entrepreneurs are at risk of being curtailed to preserve local budgets.

Threats: Infrastructure

Throughout the United States, aging infrastructure and the effects of the COVID-19 pandemic challenge government agencies and businesses alike. Clark County has been battered by economic shocks and must deal with a changed infrastructure landscape. Outdated transportation infrastructure and aging buildings will likely impact the county for years to come.

- **Reduced need for commercial buildings**

The large-scale return to offices, conference centers, and sports stadiums is unlikely in the near future. This presents a threat to commercial buildings in Clark County, which rely on rent and attendance to remain in business.

Threats: Environment

Clark County is not unique in its vulnerability to the effects of climate change. Sweltering heat, uncertain precipitation, and changing weather patterns are already affecting the county, and there are no easy solutions to these issues. In the short term, the Las Vegas Valley and the regional water supply is sensitive to the actions of regional and international actors.

- **Exposure to climate change**

Deserts are sensitive to the effects of climate change. Water conservation and land management practices will become increasingly complicated in an area that is experiencing population growth. Wildfires, both locally and regionally, are also a growing concern.

- **Threat of regional and international actors to local environments**

In addition to the effects of climate change, Clark County is at risk of pollution and environmental degradation caused by regional and international actors outside of its control. Wildfires in California have caused air quality issues, and the Las Vegas Valley is susceptible to other air pollutants that may arrive from areas as far away as Southeast Asia. Lake Mead and the Colorado River are regional resources, and water access is affected by several different factors outside of the control of Clark County.

A photograph of a desert landscape featuring a prominent red rock canyon wall in the background. The foreground is filled with dense, low-lying desert vegetation, including various shrubs and cacti. The sky is clear and blue. A semi-transparent dark grey horizontal band is positioned across the upper portion of the image, serving as a background for the title text. A thin white vertical line separates the main title from the subtitle.

Mapping the Future

An Analysis of Clark County's
Communities and Economy

Strategic Direction & Action Plan

Strategic Direction & Action Plan

The Strategic Direction—composed of a vision, mission, and a series of goals and objectives—sets forth a future desired state for Clark County’s communities and economy. It is informed by interviews with stakeholders within the Clark County government, municipal governments, and others throughout the region’s communities. The **vision** describes a desired future for Clark County that reflects the collective aspirations of regional stakeholders, whereas the **mission** describes the overall purpose of the activities undertaken by Clark County. To help Clark County achieve its vision, a number of **goals** are identified that should drive the county’s activities. These goals are further compartmentalized into specific, measurable **objectives** that the county should seek to achieve in the short and medium term.

The interviews that SRI conducted with county stakeholders revealed several valuable insights. While some themes, such as Economic Diversification and Workforce Capabilities, were identified in SRI’s prior work in Nevada, others emerged as new areas of interest, including themes like Placemaking and Equity. The remaining themes include Small Business Resources and Intraregional Collaboration. These themes are manifested in the six goals SRI developed, which can be found below, and represent the core of the community and economic development strategic plan. Additional information on stakeholder engagement and participant comments is available in Appendix B.

Perhaps most importantly, the Strategic Direction must be actionable. While the vision, mission, goals, and objectives describe an ambition, they cannot be achieved without clear activities that direct stakeholders toward a shared outcome. These activities are described in the Action Plan, which can be found further below. The Action Plan offers a list of activities that correspond to each objective, forming a pathway to realizing Clark County’s goals and thus its overall vision. Importantly, the activities that comprise the Action Plan are derived from the characteristics identified in the SWOT analysis. While the Community & Economic Assessment and Asset Map may identify various characteristics of Clark County, the SWOT analysis more acutely identifies the qualities that are within the scope of this report. For example, while there may be areas for potential improvement within Clark County School District, it is beyond the scope of this report to provide a detailed action plan to remedy all such areas. Rather, those trends identified in this report and codified in the SWOT analysis are to be addressed in the following Action Plan. In addition to describing the specific actions to be undertaken, each activity includes a designated lead and supporting organization(s), an approximate timeframe, and a general indication of resource requirements. Some activities may require little to no additional resources, whereas others are conditional on new financial commitments.

Strategic Direction

Vision

Clark County is a world-class gateway to the Mountain West, built upon prosperous and diverse communities and businesses.

Mission

Clark County catalyzes visionary initiatives that transform Southern Nevada into a smart, green, and vibrant region.

Developing the Vision & Mission

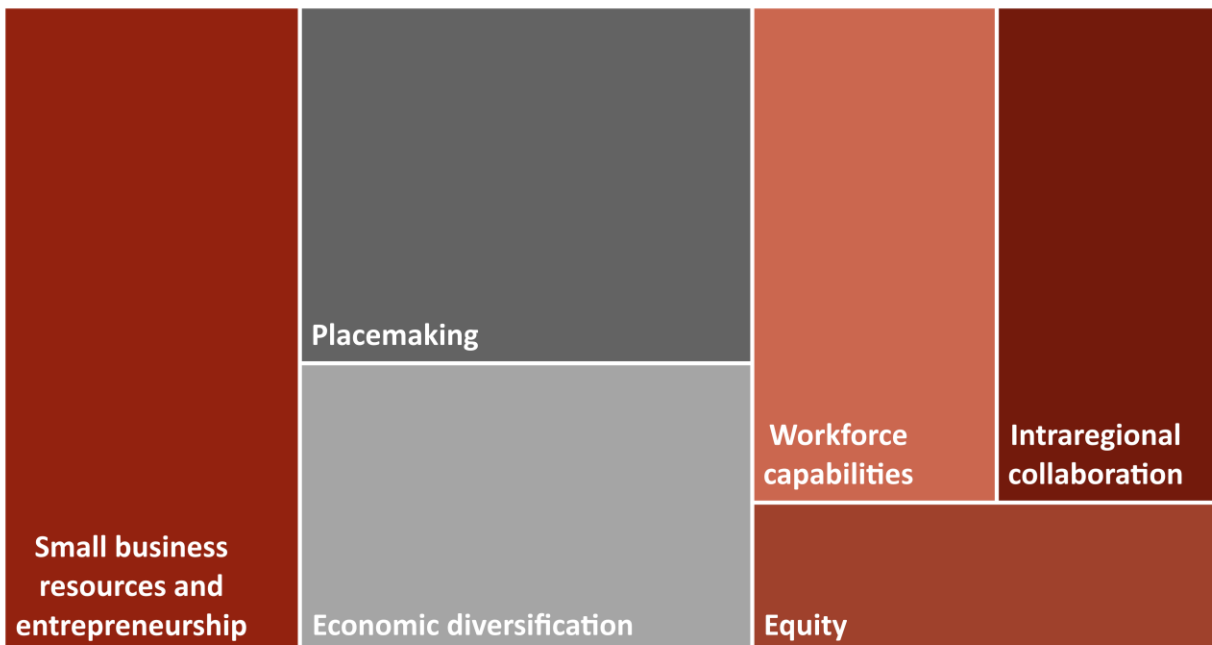
SRI International developed a set of personas that were given to members of the Clark County government. These personas were based upon emerging socioeconomic trends that SRI identified in Clark County, including:

- A small-business owner looking to expand her business
- A family of four moving to the region and beginning high-paying careers
- A retired couple looking to remain active in their local community
- A recent STEM graduate seeking employment in the local job market
- A manufacturing worker looking to advance his career

Respondents were asked to identify hypothetical goals and motivations for their given persona and how Clark County could help their persona achieve these goals. Respondents were also asked to identify different challenges their persona may face in Clark County and different initiatives or programs that may mitigate these challenges. Answers to the questions, “How can Clark County meet these needs?” and “How can Clark County solve these problems?” were compiled and categorized into one of six buckets based upon the content of the response (Small Business Resources, Placemaking, Economic Diversification, Workforce Capabilities, Intraregional Collaboration, and Equity). The vision statement was further refined using information SRI collected through interviews of numerous Clark County stakeholders, including those in the public, private, academic, and non-profit sectors.

Clark County Stakeholders Remain Focused on the Region’s Economy

Figure 18: Components of Clark County's Vision



Goals & Objectives

Six broad goals guide community and economic development efforts described in this strategy:

1. Cultivate a Fertile Environment for Small Businesses and Entrepreneurs
2. Accelerate Economic Diversification
3. Integrate the Workforce Ecosystem
4. Mobilize Stakeholders around County-Wide Initiatives
5. Promote Community-Centered Design of the Build Environment
6. Ensure Equitable Access to Resources

Goal 1: Cultivate a Fertile Environment for Small Businesses and Entrepreneurs

Small businesses and entrepreneurs remain the bedrock for local communities, comprising the majority of firms and employers. As Clark County moves beyond the effects of COVID-19 on the people and businesses of Southern Nevada, these firms will play a pivotal role in creating new opportunities and accelerating the region's recovery. Clark County's role, then, is to provide the requisite resources for this recovery and the new growth that is spurred by it. In particular, those small businesses and entrepreneurs that are located outside of the region's incorporated cities and towns, and thus the resources provided by these jurisdictions, are in need of strategic and operational assistance.

Objective 1.1: Support and coordinate activities that underpin entrepreneurship networks.

Objective 1.2: Ensure small-business owners have the tools and capabilities to scale successfully.

Objective 1.3: Expand community financial services.

Goal 2: Accelerate Economic Diversification

The impact of COVID-19 on the communities of Clark County has reinvigorated the call for economic diversification. Many organizations are focused on this goal, including the Governor's Office for Economic Development (GOED), the Las Vegas Global Economic Alliance (LVGEA), and various municipal departments throughout the county. As it enters the diversification discussion, Clark County must be strategic to avoid the duplication of efforts by other organizations. For example, while LVGEA has developed a list of target industries on which Southern Nevada should focus its efforts, Clark County can enable the emergence and growth of these industries through service and process innovations that facilitate business establishment and growth. Likewise, Clark County can serve as an advocate for the region's unincorporated areas as competitive places to do business.

Objective 2.1: Streamline business services.

Objective 2.2: Support the growth of health services.

Objective 2.3: Fuel lifestyle entrepreneurship in arts and culture and outdoor recreation.

Goal 3: Integrate the Workforce Ecosystem

The K-12 and higher education institutions in Clark County have initiated several workforce development programs over the last decade to better align the region's workforce with the needs of its employers. More so than the other economic development organizations and municipal governments in Southern Nevada, Clark County is well-positioned to drive change within Clark County School District (CCSD), such as through the development of industry-relevant curriculum at the district's schools. Creating new, and strengthening existing, relationships between CCSD, workforce

training centers, higher education institutions, and regional employers, will be a critical step in integrating Southern Nevada's workforce ecosystem.

Objective 3.1: Improve access to diverse choices for training and education for workers and employers, particularly among the region's underserved communities.

Objective 3.2: Promote innovative remote workforce programs.

Goal 4: Mobilize Stakeholders around Community-Wide Initiatives

Efficient management in local government requires breaking down barriers to collaboration. Stakeholders in the county include federal and municipal governments, LVGEA, and a variety of more targeted organizations such as chambers of commerce and philanthropic groups. Internally, many Clark County government departments have a stake in both community and economic development. Therefore, it is important that Clark County pursue cross-cutting initiatives that mobilize both internal and external stakeholders, as well as build relationships and capacity for innovation.

Objective 4.1: Reinforce strong relationships between Clark County and municipal governments.

Objective 4.2: Build fundraising capacity among regional organizations.

Goal 5: Promote Community-Centered Design of the Built Environment

Placemaking strengthens the connection between the people and the places where they live, work, and play. Clark County is home to celebrated natural and man-made attractions as well as a city known world-wide as an entertainment destination. But the heart of Clark County is its residents, a diverse community that deserves a built environment where they can express their vitality and character. The county should continue to promote its own identity through smart city innovations, alternative transit options, walkable neighborhoods, and sustainable practices, the latter of which are already a point of pride for the region. New technologies can serve residents as much as visitors, and expansion and application of these technologies outside the urban core of the county is essential for connecting communities.

Objective 5.1: Implement smart city innovation throughout the county to serve residents and visitors.

Objective 5.2: Improve and diversify access to mobility options.

Objective 5.3: Adopt and promote sustainable practices in energy and infrastructure.

Objective 5.4: Encourage revitalization of distressed areas of unincorporated Clark County.

Goal 6: Ensure Equitable Access to Resources

An equitable community is a resilient community. Equity means that, regardless of who you are, you can receive the services necessary to live and thrive. Clark County is home to a diverse population—racially, culturally, and economically—spread across administrative divisions and served by a variety of local government agencies. The opportunity exists for the county to promote and ensure equitable access to county services and adopt projects and practices with special attention to the needs of low-income and underserved communities through partnerships with local service and business organizations.

Objective 6.1: Advance equity in both the workforce and the business community.

Objective 6.2: Sustain and expand streamlined access to county services for residents and businesses.

Action Plan

The below Action Plan provides a detailed roadmap for Clark County government and its administrative components to achieve the vision and mission described in the preceding section. It is important to note that the below activities are not assignments for the respective agencies. Rather, these are recommended activities to be undertaken by Clark County government and associated stakeholder organizations. In collaboration with agencies and other regional organizations, OCED should determine the best organizational fit for the below activities if they differ from those identified below.

Goal 1: Cultivate a Fertile Environment for Small Businesses & Entrepreneurs

Objective 1.1: Support and coordinate activities that underpin entrepreneurship networks.

Activity 1.1.1: Develop a network of incubators that supports entrepreneurs throughout Clark County.

- **Lead:** OCED
- **Support:** Area higher education, LVGEA
- **Timeline:** Medium
- **Resource Requirements:** High

Activity 1.1.2: Assist in the formation of a mentorship and investor network comprised of Clark County's large retiree community.

- **Lead:** LVGEA
- **Support:** OCED, area chambers of commerce
- **Timeline:** Short
- **Resource Requirements:** Low

Objective 1.2: Ensure small-business owners have the tools and capabilities to scale successfully.

Activity 1.2.1: Coordinate with LVGEA and Las Vegas Chamber of Commerce (and other chambers) to deliver technical assistance through Small Business Development Centers.

- **Lead:** OCED
- **Support:** LVGEA, area chambers of commerce
- **Timeline:** Medium
- **Resource Requirements:** Medium

Activity 1.2.2: Develop a small business digital literacy program that enables small businesses to establish and manage their digital presence.

- **Lead:** OCED
- **Support:** Area chambers of commerce, Clark County IT
- **Timeline:** Short
- **Resource Requirements:** Medium

Objective 1.3: Expand community financial services.

Activity 1.3.1: Support the establishment of micro-lending financial institutions that focus primarily on loans ranging from up to \$25,000, \$25,000 to \$50,000, and \$50,000 to \$250,000.

- **Lead:** UNLV Small Business Development Center
- **Support:** OCED, LVGEA, area chambers of commerce
- **Timeline:** Medium
- **Resource Requirements:** Low

Goal 2: Accelerate Economic Diversification

Objective 2.1: Streamline business services.

Activity 2.1.1: Improve same-day services for online business application, licensing, and permitting procedures.

- **Lead:** Clark County Business Licensing
- **Support:** None
- **Timeline:** Medium
- **Resource Requirements:** Low

Objective 2.2: Support the growth of health services.

Activity 2.2.1: Collaborate with state government to seek an increase in Medicaid reimbursement rates for hospitals in Clark County.

- **Lead:** Clark County Commission
- **Support:** Legislative Delegation, Chambers of Commerce, Municipal Leaders
- **Timeline:** Short (2021 Legislative Session)
- **Resource Requirements:** Low

Activity 2.2.2: Develop new medical training and residency programs at the county's healthcare facilities that grows local health talent.

- **Lead:** Area higher education, area hospitals
- **Support:** OCED, LVGEA
- **Timeline:** Long
- **Resource Requirements:** High

Objective 2.3: Fuel lifestyle entrepreneurship in arts and culture and outdoor recreation.

Activity 2.3.1: Launch an annual showcase, sponsored by Clark County Parks & Recreation and other organizations, for outdoor recreation service providers and vendors to demonstrate their goods and services in various outdoor elements.

- **Lead:** Clark County Parks and Recreation
- **Support:** OCED, Get Outdoors Nevada
- **Timeline:** Short
- **Resource Requirements:** Medium

Activity 2.3.2: Establish the Las Vegas Digital Arts Foundry as a content creation space for digital, virtual, and performance artists to create and share their creations.

- **Lead:** Clark County Arts Committee, Las Vegas Arts Commission
- **Support:** OCED, UNLV
- **Timeline:** Long
- **Resource Requirements:** Medium

Activity 2.3.3: Partner with the Parks and Recreation Department, local theater companies, and local performance artists to offer a performance arts series in municipal parks. Invite food trucks and enforce strict social distancing.

- **Lead:** OCED, Clark County Parks and Recreation
- **Support:** Local artists, local food truck vendors
- **Timeline:** Short
- **Resource Requirements:** Medium

Activity 2.3.4: Establish “Digital Downtown Arts” by collaborating with selected properties to allow digital projection of large scale, interactive murals highlighting local artists and incorporating augmented reality to be enjoyed by viewers with mobile devices.

- **Lead:** Clark County Arts Committee, Las Vegas Arts Commission
- **Support:** OCED, local artists
- **Timeline:** Short
- **Resource Requirements:** Low

Activity 2.3.5: Identify large vacant parking lots to be used for theaters and performers to set up drive-through performances and movies.

- **Lead:** OCED
- **Support:** Department of Comprehensive Planning
- **Timeline:** Short
- **Resource Requirements:** Low

Goal 3: Integrate the Workforce Ecosystem

Objective 3.1: Improve access to diverse choices for training and education for workers and employers, particularly among the region’s underserved communities.

Activity 3.1.1: Host job fairs and information exchanges within underserved communities and unincorporated areas of Clark County.

- **Lead:** OCED
- **Support:** Area chambers of commerce
- **Timeline:** Short
- **Resource Requirements:** Low

Activity 3.1.2: Increase access to high-quality career counseling for high school and community college students.

- **Lead:** CCSD
- **Support:** Area higher education
- **Timeline:** Medium
- **Resource Requirements:** Medium

Objective 3.2: Promote innovative remote workforce programs.

Activity 3.2.1: Deploy individualized micro workstations at the county’s public libraries that provide workers with Wi-Fi-enabled, personal workplaces.

- **Lead:** Las Vegas-Clark County Library District
- **Support:** None
- **Timeline:** Medium
- **Resource Requirements:** High

Goal 4: Mobilize Stakeholders around Community-Wide Initiatives

Objective 4.1: Reinforce strong relationships among Clark County and municipal governments.

Activity 4.1.1: Host regional leadership program for county, municipal, and regional officials to build leadership skills and relationships between different stakeholders.

- **Lead:** OCED
- **Support:** None
- **Timeline:** Short
- **Resource Requirements:** Low

Activity 4.1.2: Develop county toolkit for economic preparedness.

- **Lead:** OCED
- **Support:** Clark County and municipal government departments
- **Timeline:** Medium
- **Resource Requirements:** Medium

Objective 4.2: Build fundraising capacity among regional organizations.

Activity 4.2.1: Contract with a grant-writing training firm to offer workshops for community organizations and stakeholders in grant identification and writing.

- **Lead:** OCED
- **Support:** Non-profit grant-writing training firm
- **Timeline:** Short
- **Resource Requirements:** Low

Activity 4.2.2: Contract with a non-profit training firm to develop training courses for community organizations and others in non-profit management and fundraising.

- **Lead:** OCED
- **Support:** Non-profit training firm
- **Timeline:** Short
- **Resource Requirements:** Low

Goal 5: Promote Community-Centered Design of the Built Environment

Objective 5.1: Implement smart city innovation throughout the county to serve residents and visitors.

Activity 5.1.1: Build “smart” streetlamps in low-income neighborhoods and public parks that provide free Wi-Fi hotspots to help bridge the digital divide.

- **Lead:** OCED, Department of Comprehensive Planning
- **Support:** Las Vegas Innovation District
- **Timeline:** Long
- **Resource Requirements:** High

Activity 5.1.2: Scale technologies from the Las Vegas Innovation District to other communities throughout the county.

- **Lead:** OCED, Department of Comprehensive Planning
- **Support:** Las Vegas Innovation District
- **Timeline:** Long
- **Resource Requirements:** High

Objective 5.2: Improve and diversify access to mobility options.

Activity 5.2.1: Partner with Clark County GIS Management Office to map unincorporated Clark County for walkability based on proximity to services and businesses.

- **Lead:** OCED, GIS Management Office
- **Support:** None
- **Timeline:** Short
- **Resource Requirements:** Low

Activity 5.2.2: Support continued improvement of alternative transit options, including Regional Transportation Commission bikeshares, bus rapid transit, and walkable transit-oriented developments.

- **Lead:** OCED, RTC
- **Support:** None
- **Timeline:** Long
- **Resource Requirements:** High

Objective 5.3: Adopt and promote sustainable practices in energy and infrastructure.

Activity 5.3.1: Actively support NV Energy in the development of an electric vehicle charging network throughout Clark County.

- **Lead:** OCED
- **Support:** NV Energy
- **Timeline:** Long
- **Resource Requirements:** Medium

Activity 5.3.2: Expand alternative recycling options in Clark County and investigate electric vehicle battery recycling as an emerging industry.

- **Lead:** OCED, NV Energy
- **Support:** Nevada Department of Environmental Protection
- **Timeline:** Long
- **Resource Requirements:** High

Objective 5.4: Encourage revitalization of distressed areas of unincorporated Clark County.

Activity 5.4.1: Partner with the Southern Nevada Regional Housing Authority (SNRHA) to implement a home rehabilitation program for residents living in distressed neighborhoods.

- **Lead:** SNRHA
- **Support:** OCED
- **Timeline:** Medium
- **Resource Requirements:** High

Goal 6: Ensure Equitable Access to Resources

Objective 6.1: Advance equity in both the workforce and the business community.

Activity 6.1.1: Conduct study to identify gaps in transportation access to regional charter, magnet, and CTE schools for disadvantaged students and their families.

- **Lead:** CCSD
- **Support:** RTC
- **Timeline:** Medium
- **Resource Requirements:** Medium

Activity 6.1.2: Partner with philanthropic groups, community services, and local chambers of commerce to establish a Clark County Community Equity Task Force.

- **Lead:** OCED
- **Support:** Urban, Hispanic, Las Vegas, and Asian chambers of commerce, local philanthropic groups, community services departments
- **Timeline:** Short
- **Resource Requirements:** Low

Objective 6.2: Sustain and expand streamlined access to county services for residents and businesses.

Activity 6.2.1: Develop a mobile app that brings together social services for county residents, allowing them to submit requests and required documentation to obtain county and municipal services. The app could expand to include state services in partnership with state agencies.

- **Lead:** OCED, Clark County IT
- **Support:** Municipal governments, Nevada Division of Welfare and Social Services
- **Timeline:** Medium
- **Resource Requirements:** Low

Visionary Opportunities for Clark County

SRI has identified clear opportunities for Clark County to pursue a select number of signature ideas: high-profile projects with powerful economic and social spillovers that will also serve to build a distinct image for the county as a rich, dynamic, complex community.

Red Rock Canyon/Spring Mountain Arts & Entertainment Venue

Red Rock Canyon National Conservation Area and the adjacent Spring Mountain Ranch are two of the most spectacular natural assets in Southern Nevada, enjoyed at present for trails, scenery, and outdoor events (including a summer theater festival). Working in partnership with the Bureau of Land Management (BLM), the Southern Nevada Conservancy (SNC), and Nevada State Parks, Clark County should take the lead in the funding, design, and construction of a permanent, year-round arts and entertainment venue at a location within these amenities. The venue would be modeled on a well-known example in Colorado, the Red Rocks Amphitheatre, an acoustically perfect outdoor concert arena in a state park in the mountains outside of Denver, Colorado. Another model is the Wolf Trap, an outdoor venue in Virginia near the Washington D.C. metro area, operated in partnership with the National Park Service.

The venue proposed here would not be as ambitious as these other arenas, but rather would be designed as an intimate place for local artists and performers to reach a local audience. It would be a place that enriches the lives of Clark County residents, where they could commune with the stars in the cool nighttime air of the desert, while enjoying performances by some of the talented performers that live in Southern Nevada's communities. Its design and construction have the potential be a showcase for the substantial architectural and design talent in Southern Nevada.

Such a project requires political will as much as financing and can only be achieved by working carefully with all stakeholders. The project would have to take account of the sensitive ecosystem of the park and not impair other uses. But when achieved, it could be a hallmark for the vibrant creative community that lives in the county.

Vegas Valley Rim Trail & Arts in the Desert

In the state of Nevada, 86% of land is public land managed by the federal government. In addition to indoor entertainment found in Las Vegas, Southern Nevada boasts many outdoor recreation attractions, such as Lake Mead, Red Rock Canyon, and Mount Charleston, which provide year-round opportunities to enjoy the great outdoors. Trails and outdoor recreation are a great boon to the local community, economically and socially.

As Nevada works to diversify its economy, the outdoor recreation workforce has grown. According to the Outdoors Industry Association, the outdoors industry in Nevada generates \$12.6 billion in consumer spending, 87,000 jobs, \$4 billion in wages and salaries, and \$1.1 billion in local and state tax revenue. Outdoor recreation ranks third behind only gaming and healthcare in sustaining jobs in Nevada. Trails are attractive to nearby businesses and residents, increasing property values. They can also promote healthy activity and create a sense of community.

The Vegas Valley Rim trail is a long-running project that aims to connect 113-miles of trails around the Las Vegas Valley. In addition to beautiful natural attractions, Clark County is home to a small but vibrant art community. First Friday Arts Showcase is a well-known monthly event that showcases local arts and artists that takes place in the Las Vegas Art District, also known as 18b.

This signature idea would focus on completing and advertising the Vegas Valley Rim trail, as well as supporting local arts culture. The initial stage would involve partnering with Get Outdoors Nevada

and the Clark County Comprehensive Planning Department to complete the trail. For the grand opening, Clark County could obtain microgrants to fund a partnership between local artists, the First Friday Foundation, and the College of Southern Nevada to design and create temporary and permanent art installations along the completed Vegas Valley Rim Trail. Installations would be a mix of physical sculptures and digital arts with the aim of low environmental impacts. Sculptures and digital art performances would attract visitors to experience the natural wonders of Clark County while supporting local artists struggling due to COVID-19. Art and artists, as well as outdoor recreation, can improve quality of life for residents, while also attracting new visitors. Art installations in the desert would be social media friendly and promote healthy activity.

Multi-Modal & Advanced Manufacturing Park

Clark County occupies a competitive location in the western United States, with proximity to several major urban areas in the West, and is situated in a competitive, business-friendly state. Strengthening connections with these urban areas, as well as other regions of Nevada, will increase Clark County's attractiveness as a place to produce and distribute goods for western markets and beyond. The development of a multi-modal transportation hub in southern Clark County would build these connections and cement Southern Nevada as a major logistics hub in the western United States. Co-locating this hub with an advanced manufacturing park would further increase the county's attractiveness as not only a place to distribute goods, but also a place to produce them.

Existing studies have identified Southern Nevada as a competitive location for logistics and manufacturing in the western United States, and the COVID-19 pandemic and its impact on national and global supply chains has increased the attractiveness of expanded U.S.-based manufacturing capacity. Establishing a multi-modal and advanced manufacturing park would provide further opportunity for Clark County to diversify the regional economy while providing employment opportunities for individuals at various education levels, including those with post-secondary credentials, two-year and four-year degrees.

The development of a multi-modal and advanced manufacturing park would require collaboration between local and state government, particularly as the park relates to infrastructure development (e.g., highway and railway expansion) with considerable financial requirements.

Housing Southern Nevada's Homeless

According to analysis by the U.S. Department of Housing and Urban Development's 2018 Point in Time (PIT) homelessness count by Security.org, the Las Vegas metro area ranked seventh in the United States for the number of homeless individuals per 100,000 population. While data from recent years indicate that Las Vegas has been successful at reducing the rate of homelessness in the region, Las Vegas remains among the U.S. cities with the highest rates of homelessness.⁷³

The 2019 Southern Nevada Homeless Census found that roughly 60% of the region's homeless population was unsheltered, and more than half of those who were unsheltered were living on the street, outdoors, in vehicles, in the desert, or in an encampment.⁷⁴ Likewise, between 2018 and 2019, while the region's overall rate of homelessness declined, the rate of those who became chronically homeless increased 23%, representing 11% of the region's total homeless population.⁷⁵ The loss of a job / unemployment and substance abuse were cited as the two most common causes for homelessness in Southern Nevada, with mental illnesses also cited as a common reason.⁷⁶ These statistics indicate the need for a comprehensive approach to addressing Southern Nevada's homelessness.

Cities across the United States have begun experimenting with new interventions for servicing their homeless populations. Approaches differ from offering wrap-around services for homeless populations, to providing housing, or some combination of the two. A notable example can be seen in Dallas, Texas, where a community of “tiny homes” was built in a neighborhood of the city to house 50 homeless individuals. The community was built in partnership between Dallas County, the City of Dallas, and the non-profit CitySquare, which manages the homes in the community.⁷⁷ Residents in the neighborhood are offered several services, including free medical care and counseling, as well as a place in one of the community’s tiny homes. According to estimates by CitySquare, the average cost of a homeless individual in the community was \$40,000 per year, whereas the cost to provide shelter in a tiny house was roughly \$15,000, making the community a cost-effective solution for the county’s unsheltered homeless population.⁷⁸

A similar approach to Clark County’s homeless population will require collaboration between local governments and the various non-profit organizations that have established a reputation with Southern Nevada’s homeless population, such as HELP of Southern Nevada, Help Hope Home, or Built for Zero Southern Nevada. While any one of these organizations could assist in the management of the proposed communities, the Clark County government could assist by providing the land and supplemental resources for the community, including partial funding for the shelters as well as the services provided within the community.

Fostering Clark County’s Technology Entrepreneurs

As part of the region’s efforts to diversify its local economy, regional-, county-, and municipal-level organizations have sought to encourage the growth of home-grown technology talent. Stakeholders throughout Clark County have enacted different policies and programs, including new programs at the region’s two- and four-year higher education institutions, as well as tech-centered programs at CCSD schools. While such programs are effective for developing individuals who can work in the technology industry, they are less effective at providing opportunities for local talent to develop and commercialize new technologies.

There have been preliminary efforts to fill this gap in Southern Nevada, notably through the establishment of UNLV’s Black Fire Innovation campus. However, Black Fire Innovation remains focused exclusively on the gaming, hospitality, and entertainment industries. While these industries represent the dominant employers for the region, opportunities for technology entrepreneurs that are interested in other industries to develop and commercialize their technologies will better enable Clark County to diversify its economy. Similarly, a dedicated technology incubator in Southern Nevada will allow the region to retain the existing educated workers who would likely approach an incubator to develop a new technology, rather than relocate to other metro areas in the western United States.

Launching a technology incubator in Southern Nevada will require Clark County to partner with several other organizations and stakeholders in the regional economy. An obvious partner is UNLV, which, as the region’s flagship university, serves as a natural hub for research, development, and innovation activities in Clark County. StartupNV, a non-profit organization dedicated to entrepreneurship and angel investment in Nevada, would be an effective managing organization for establishing and growing the proposed technology incubator. To fund the development of this incubator, Clark County will likely need to pool resources from these organizations, in addition to regional economic development organizations like LVGEA.

A photograph of the Valley of Fire in Clark County, Nevada, showing layered red and orange rock formations under a clear sky. The text is overlaid on the left side of the image.

Mapping the Future

An Analysis of Clark County's
Communities and Economy

Evaluation Framework

Evaluation Framework

Performance Metrics

Goal 1 Performance Metrics: Cultivate a Fertile Environment for Small Businesses & Entrepreneurs

Metric	Data Source
Number of incubators established in Clark County	OCED
Number of mentors recruited for retiree mentorship and investor network	OCED
Number of activities promoting entrepreneurship and business education	LVGEA
New capital investment	LVGEA

Goal 2 Performance Metrics: Accelerate Economic Diversification

Metric	Data Source
Number of medical residency and fellowship programs established at Clark County hospitals	Southern Nevada Health District

Goal 3 Performance Metrics: Integrate the Workforce Ecosystem

Metric	Data Source
Number of job fairs held	OCED
Number of employers represented at job fairs	OCED
Number of attendees at job fairs	OCED
Number of schools equipped with career counselors	CCSD
Number of micro-workstations installed at county public libraries	OCED

Goal 4 Performance Metrics: Mobilize Stakeholders around Community-Wide Initiatives

Metric	Data Source
Number of attendees at regional leadership program	OCED
Number of attendees at grant-writing training workshop	OCED
Number of attendees at non-profit training workshop	OCED
Number of grants written	OCED
Number of grants obtained	OCED

Goal 5 Performance Metrics: Promote Community-Centered Design of the Built Environment

Metric	Data Source
Number of new charging stations	NV Energy
Number of cars using charging stations	NV Energy
Number of new bikeshare stations and bikes	RTC
Number of bikeshare rides and downloads of bikeshare application	RTC
Number of new BRT rides	RTC
Number of houses rehabilitated	SNRHA
Number of smart streetlamps installed	Department of Comprehensive Planning
Number of smart technology applications scaled from Las Vegas Innovation District	

Goal 6 Performance Metrics: Ensure Equitable Access to Resources

Metric	Data Source
Number of documents submitted through application	Clark County IT
Number of application downloads	Clark County IT
Number of services made accessible through application	Clark County IT, Nevada Division of Welfare and Social Services

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Appendix A | Interviewee & Participant List

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Appendix A-1: Interviewee & Participant List

Nancy Amundsen, Clark County Government	Justin Jones, Clark County Board of Commissioners
Derek Armstrong, City of Henderson	Ryann Juden, City of North Las Vegas
Roben Armstrong, McCarran International Airport	Yolanda King, Clark County Government
Mauricia Baca, Get Outdoors Nevada	Marilyn Kirkpatrick, Clark County Board of Commissioners
Larry Brown, Clark County Board of Commissioners	Phil Klevorick, Clark County Government
Dr. Nancy Brune, Guinn Center for Policy Priorities	John Jay Lee, City of North Las Vegas
Jessica Colvin, Clark County Government	Debra March, City of Henderson
John Curran, Dapper Companies	Zachary Miles, University of Nevada Las Vegas
Richard Derrick, City of Henderson	Paul Moradkhan, Las Vegas Chamber of Commerce
Kenneth Evans, Urban Chamber of Commerce	Michael Naft, Clark County Board of Commissioners
James B. Gibson, Clark County Board of Commissioners	Kevin Schiller, Clark County Board of Commissioners
Peter Guzman, Latin Chamber of Commerce	Tick Segerblom, Clark County Board of Commissioners
Nadia Hansen, Clark County Government	Les Lee Shell, Clark County Government
Marci Henson, Clark County Government	Jerry Stueve, Clark County Government
Daniel Hernandez, Clark County Government	Randall Tarr, Clark County Government
Jacqueline Holloway, Clark County Government	Jeffrey Wells, Clark County Government

Appendix A-2: Interview Protocols

The following interview protocols provided the outline for each interview or stakeholder session, with questions in bold representing the most important topics of interest. Interviewees were not necessarily asked every single question due to time constraints, and follow-up questions beyond the interview protocols listed here were asked as needed to clarify responses or better understand an interviewee's area of expertise. All interviews began with a summary of the project and a disclaimer statement about how information the interviewee provided would be used.

Introduction and Disclaimer

SRI International's Center for Innovation Strategy and Policy (CISP) is working with the Clark County Department of Community and Economic Development to create an economic and community development strategy for the county. As part of this project, we are conducting a wide range of interviews to help assess the region's economic performance, challenges, opportunities, and strategic possibilities for the future. We are speaking with a diverse set of stakeholders, including economic development practitioners, government agencies, educators and administrators, and industry representatives to develop a balanced set of perspectives. We are also interested in speaking with Clark County staff and elected officials.

Thank you for agreeing to participate in the project. The questions we will ask are intended to gather information about your understanding of the county's current economic situation, policies, and practices. We will be taking notes but will be synthesizing feedback from the interviews and will not attribute any comments to any specific individual in a public report. Do you have any questions before we begin?

QUESTIONS FOR COMMISSIONERS

1. What are your main expectations, your most important priorities, for an economic and community development plan for Clark County?
2. Are there any issues that you consider to be off-limits?
3. What are some of the problems or challenges you foresee in this project that SRI should be aware of?

GENERAL QUESTIONS

1. Tell us about your organization and position.
2. How would you characterize your organization's mission? What role does it play in the county's economy?
3. From the point of view of your organization, what are Clark County's greatest assets?
4. Its greatest weaknesses?
5. From the perspective of your organization, how do you see the COVID-19 pandemic affecting Clark County over the short term? The long term?
6. What are one or two policies, programs, or initiatives that you believe Clark County should implement to effectively emerge from the COVID-19 pandemic?
7. What does a successful Clark County look like post-COVID-19? [e.g., more diversified; better health options; better workforce training institutions; etc.]
8. What is your familiarity with the current state of economic development in the county? Does it have any influence on your job?
9. What policies, programs, or initiatives would you like to see emphasized as part of the community and economic development strategy for Clark County?

10. What policies, programs, or initiatives do you see as being out-of-scope for the community and economic development strategy?
11. From the perspective of your organization, how important is collaboration with economic development-focused organizations, such as the municipal government agencies, chambers of commerce, and the Department of Community and Economic Development?
12. Are there any principles, guidelines, or documents that guide the activities you perform that you think would be useful for this community and economic development strategy?
13. What role do you see your organization playing in future economic development projects in Clark County?
14. In general, how would you describe the environment for doing business in Clark County [permitting, taxes, etc.]?
15. Finally, is there anything else you believe is important for us to know for this project?

TOPICAL QUESTIONS

Workforce-Focused Questions

1. How does your organization market Clark County's workforce and skill set to prospective employers? What specific skills or attributes of the county's workforce do employers find valuable?
2. Are there specific business/industries related to your organization that have challenges in hiring the workers they need? What occupations, skill sets, or areas of technical expertise do your local employers say are in highest demand and/or least supply?
3. How would you judge the quality of the links between workforce institutions and employers in Clark County? Can you name any examples of particularly innovative or successful partnerships between universities/community colleges and private business?

Quality of Life and Culture

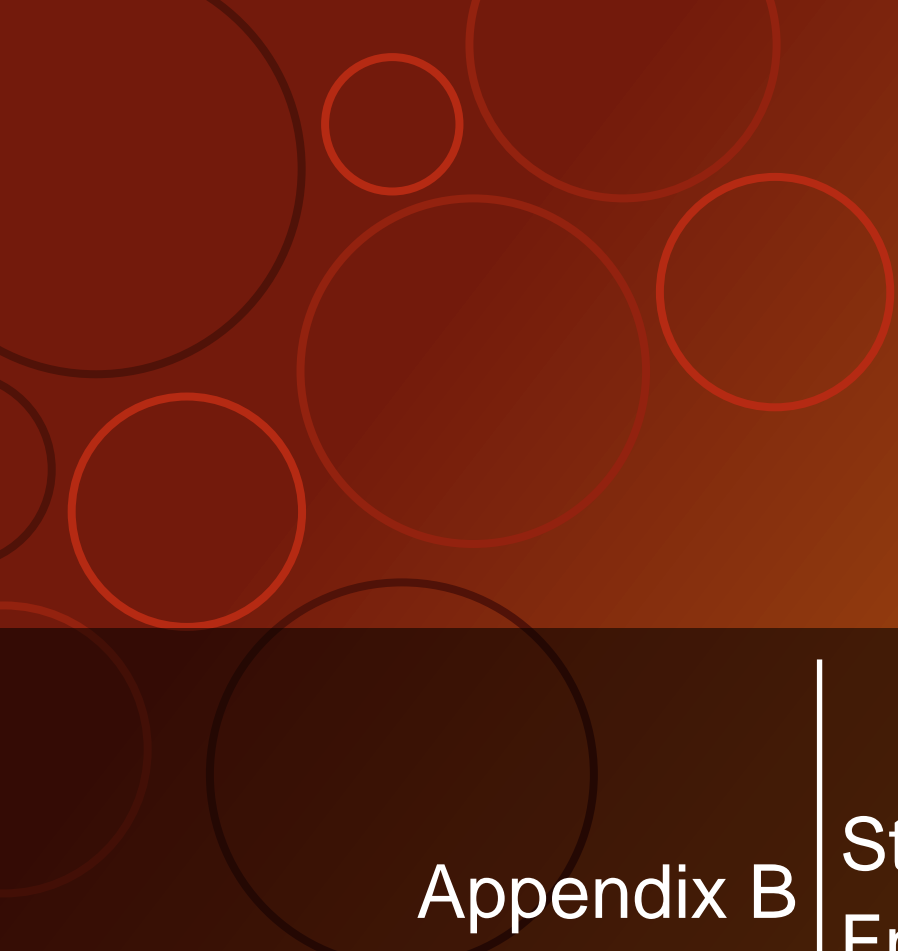
4. What kind of cultural and recreational assets does Clark County have that residents can enjoy? What could make the region more attractive to more residents?
5. How does the region fare in areas such as health, safety, and crime? What could be improved?

Environment and Infrastructure


6. Are there any environmental pressures that could constrain the region's growth or jeopardize its economy? [Prompts: water scarcity and management, heat waves, land use]
7. Are there any areas where Clark County has or could show environmental leadership?
8. How would you rate the quality of the region's infrastructure? What challenges or opportunities does it face in terms of transportation, energy, utilities, etc.?

Innovation-Focused Questions

9. **(Idea Generation)** What sectors or industries in the Clark County are known for performing a lot of innovation, R&D, and technology development, and why?
10. **(Innovation Culture)** How would you characterize the entrepreneurial culture in Clark County? Are people willing to take risks and start new companies?
11. **(Risk Capital)** Is there sufficient risk capital available in the region to entrepreneurs to advance their technologies and get to market? Do startups have access to either public or private seed funding, venture capital?
12. **(Programs)**: What programs/resources in Clark County support innovation, R&D, and tech-based development? (*e.g., incubators, special VC/financing programs, university technology transfer offices, etc.*)? How well are these programs doing? What gaps are there that need to be improved upon?
13. **(Talent)** Where do startups go to recruit skilled workers in the area? Are they able to find the employees with the technical skills they need?
14. **(Talent)** Do entrepreneurs and startups know how to scale their businesses successfully? Is there a shortage of managerial talent in the area?
15. **(Networks)** In general, how would you rate the linkages among universities, research institutions, and entrepreneurs/the private sector in the area?
16. **(Networks)** Where can entrepreneurs and startups go for mentorship or advice in Clark County [*or specific metro/micro areas*]? Are there experienced entrepreneurs or venture capitalists who are available to serve as mentors for incubators, accelerators?

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Appendix B | Stakeholder Engagement Exercises

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Appendix B: Stakeholder Engagement Exercises

Community participation is a vital part of the Strategic Plan creation process, especially in the crafting of a vision statement and the generation of goals for the County. In addition to interviews with individual community members, visioning exercises were distributed to stakeholders. These exercises were designed to collect community input on a vision for Clark County and elicit priorities for the Strategic Plan.

Envisioning the Needs of a Diverse Population – Participants were divided into groups, with each group receiving a “persona”—a hypothetical individual or household representative of a different slice of the region’s current or prospective population. Each group was asked to consider the potential goals, motivations, and concerns of their persona and determine what Clark County could offer to help meet the needs of the persona. Common themes and answers were extracted and categorized to generate a vision and mission for Clark County.

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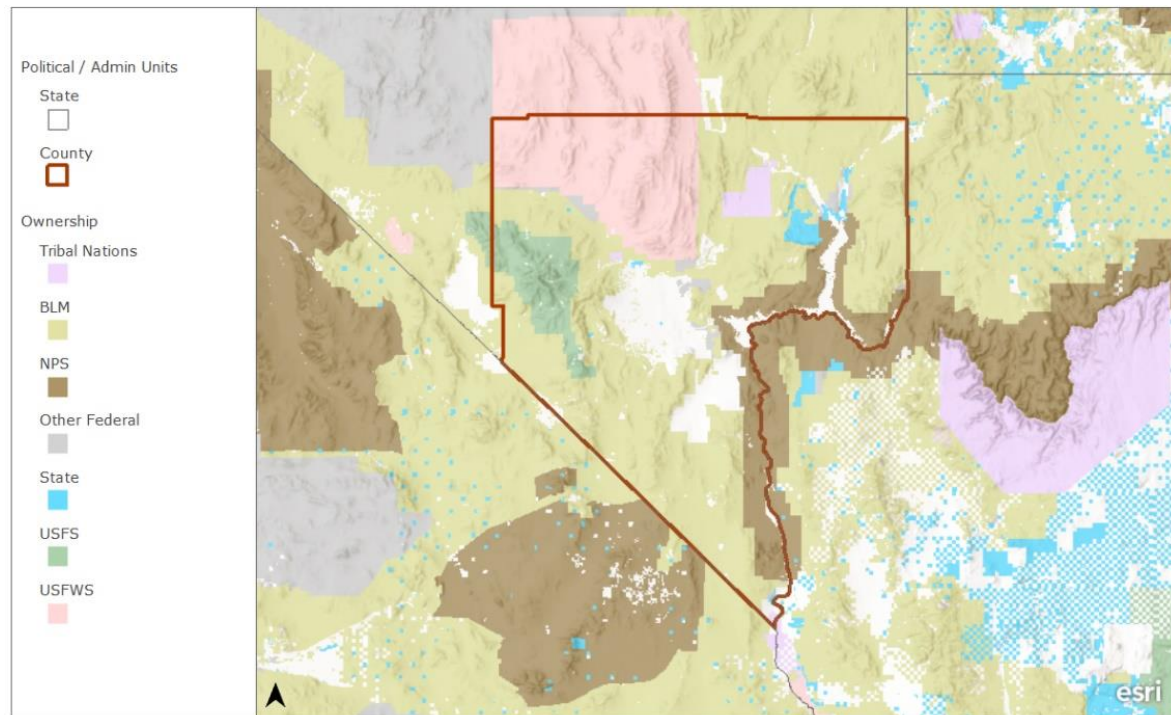
Appendix C | Additional Visualizations

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Appendix C: Additional Visualizations

Land in Clark County is Primarily Federally Owned and Managed

Figure 19: Land ownership by Federal, State, and Tribal Entities. Source: National Wildland Explorer Map, ESRI ArcGIS.

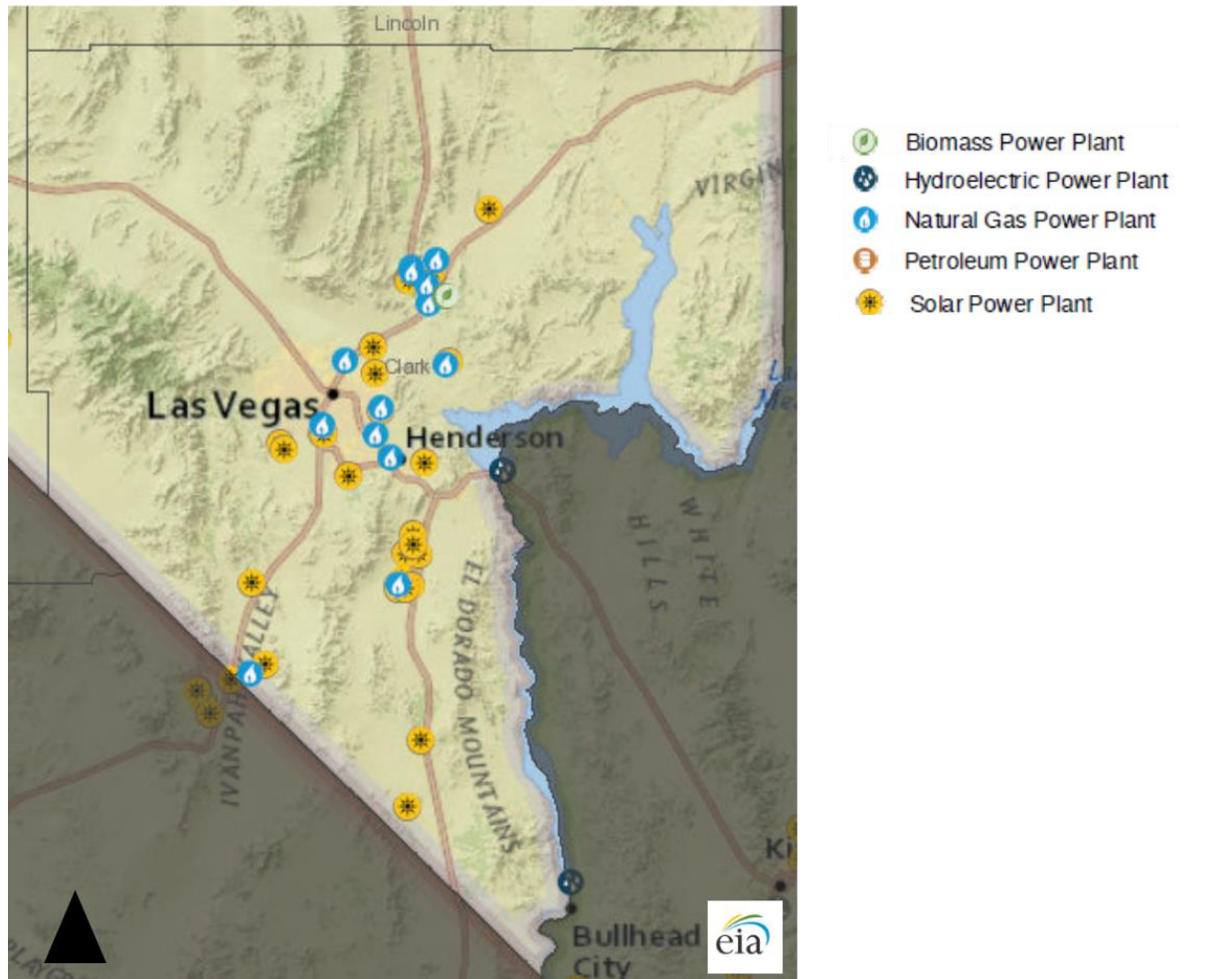


National-scale Landscape Explorer. Structured as Single_Scale_Single_Multilayer.

Esri, USGS | Esri, HERE, Garmin, SafeGraph, FAO, METI/NASA, USGS, Bureau of Land Management, EPA, NPS | TWS, ESRI, BLM, USFS, USFWS, NPS, National Atlas of the United States, Clerk of the U.S. House of Representatives, U.S. Senate

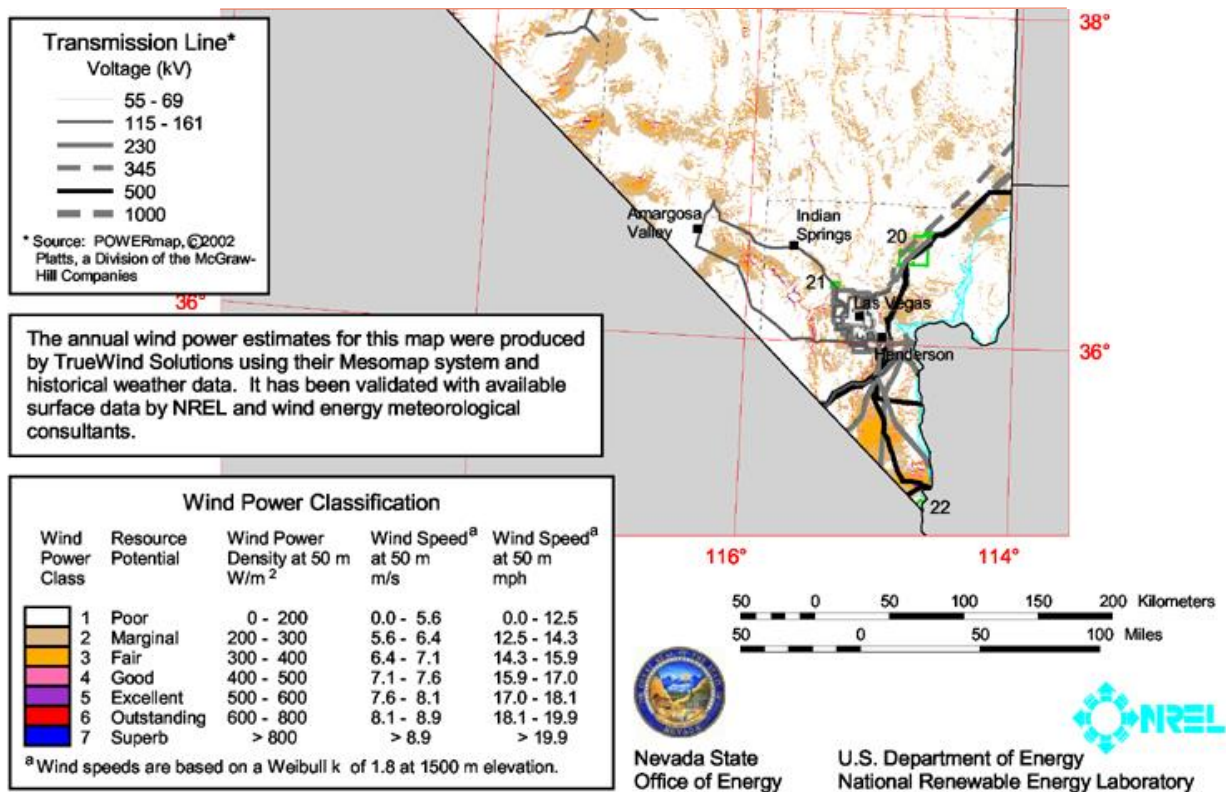
Clark County Is Home to the Majority of New Solar and Solar Storage Power Plants in Nevada

Figure 20: Nevada power plants by source of energy, 2019. Source: U.S. Energy Information Administration.



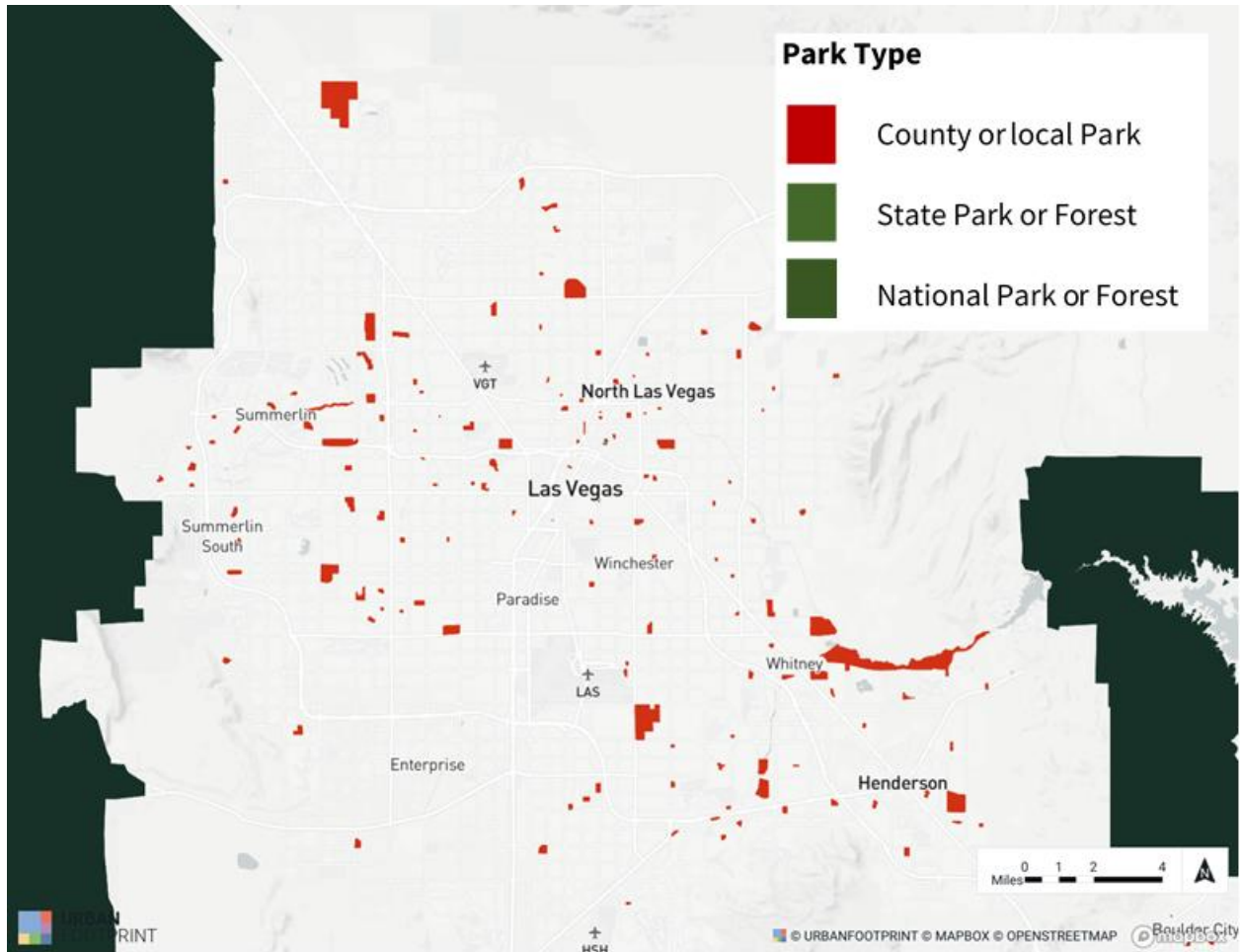
Southern Clark County has Potential for Wind Energy Development

Figure 21: Wind Resource Potential in Southern Nevada, 2003. Source: U.S. Department of Energy.



Areas of the Las Vegas Valley Have Less Access to Walkable Small Parks

Figure 22: Parks in the Las Vegas Valley. Areas of unincorporated Enterprise have few small walkable parks, leading to “park” or “play” desserts as described by the American Society of Civil Engineers. Source: ESRI, OpenStreetMap, Urban Footprint.



The background consists of three horizontal bands of color: a top band of light orange, a middle band of dark brown, and a bottom band of medium orange. Scattered across these bands are several circles of varying sizes, some outlined in dark brown and others in a lighter orange. The word "Notes" is centered in the dark brown band.

Notes

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