

Sustainable Communities



Summary of Key Findings

- **Economic diversity remains an issue.** Leisure and hospitality employees comprise a much greater share of employment in the Las Vegas MSA compared to the U.S.
- **Rapidly changing demographic make up.** Southern Nevada's Hispanic population is growing at a significantly higher rate as compared to the nation as a whole.
- **Access to healthcare acute issue.** Nevada has the second highest share of its population that is uninsured and remains well underserved by healthcare professionals.
- **Community safety improving.** Though overall crime in the Las Vegas MSA has been declining, the crime rate remains higher than the U.S. average.
- **Development well off peak levels.** Development and investment remain well below peak levels, contributing to sustained elevated unemployment rates.
- **Clear pockets of community risk.** Community risk is highest in the urban core of the valley, where there are particularly high concentrations of TANF, SNAP, and Medicaid recipients.














Economic Health



Key Findings

- **Heavy concentration in tourism.** The leisure and hospitality industry is highly concentrated in the Las Vegas MSA, at a rate 3.21 times higher than the national average.
- **Not fully recovered from the recession.** 1- and 5-year employment growth rates for the Las Vegas MSA have been worse than those of the U.S. 10-year growth rates have exceeded those of the U.S.
- **Health and education services a bright spot.** Education and health services is the only industry in the Las Vegas MSA to consistently have positive growth over the last 1-, 5-, and 10-year periods.



Industry	U.S. Employment	% of Total Employment	Las Vegas MSA Employment	% of Total Employment	Location Quotient
Natural Resources & Mining	836,000	0.6%	300	0.0%	0.06 
Information	2,621,000	1.9%	9,200	1.1%	0.58 
Other	5,398,000	4.0%	24,600	3.0%	0.75 
Construction	5,770,000	4.3%	34,600	4.2%	0.98 
Financial Activities	7,766,000	5.8%	38,800	4.7%	0.82 
Manufacturing	12,019,000	8.9%	20,000	2.4%	0.27 
Leisure & Hospitality	13,692,000	10.2%	268,200	32.6%	3.21 
Professional & Business Services	18,171,000	13.5%	100,900	12.3%	0.91 
Education & Health Services	20,611,000	15.3%	76,300	9.3%	0.61 
Government	22,393,000	16.6%	94,600	11.5%	0.69 
Trade, Transportation & Utilities	25,515,000	18.9%	155,000	18.8%	1.00 
Total	134,792,000	100.0%	822,500	100.0%	—



Industry	U.S. Growth 1-Year	Las Vegas MSA 1-Year	U.S. Growth 5-Year	Las Vegas MSA 5-Year	U.S. Growth 10-Year	Las Vegas MSA 10-Year
Information	-0.8%	-1.1%	-13.2%	-19.3%	-21.5%	-21.4%
Government	0.0%	1.2%	-1.2%	-6.5%	2.4%	16.6%
Construction	0.3%	-10.4%	-26.0%	-65.8%	-16.3%	-51.3%
Other	1.0%	1.7%	-1.6%	-4.7%	0.3%	21.8%
Financial Activities	1.0%	-0.8%	-5.9%	-21.5%	-1.3%	-7.2%
Trade, Transportation & Utilities	1.4%	2.3%	-4.5%	-4.4%	-0.1%	18.0%
Manufacturing	1.5%	1.0%	-13.0%	-24.0%	-20.4%	-8.3%
Natural Resources & Mining	1.7%	50.0%	13.3%	-40.0%	42.7%	0.0%
Education & Health Services	2.0%	5.7%	10.5%	18.1%	24.9%	56.4%
Leisure & Hospitality	2.5%	0.1%	1.9%	-1.9%	14.0%	14.8%
Professional & Business Services	2.9%	-1.5%	-0.1%	-13.2%	12.6%	22.5%
Total	1.4%	0.5%	-2.9%	-11.8%	2.7%	10.6%



Demographic Trends



Key Findings

- **Community is rapidly diversifying.** The Hispanic population has grown by 67.3 percent in the last 10 years and is projected to grow by 2.5 percent in 2012, higher than the overall growth rate for Clark County.
- **Educational attainment remains a challenge.** Only 22.1 percent of the southern Nevada's adult population has a bachelor's degree or higher, among the lowest rates of educational attainment in the nation.
- **Median household income stabilizing.** After falling for the past couple of years, median household incomes appear to be stabilizing. That said, income disparities among various ethnic groups appear to be widening.



Race/ Ethnicity	2011 Population	1 Year Growth	5 Year Growth	10 Year Growth	Projected 2012 Growth	Median Household Income	Educational Attainment (% with Bachelor's or Higher)
White	1,064,935	-0.3%	5.1%	20.5%	0.2%	\$57,817	22.9%
Black	180,575	0.8%	11.8%	34.9%	1.3%	\$41,210	16.8%
American Indian, Eskimo, or Aluet	16,599	0.2%	9.6%	35.6%	0.9%	\$49,232	8.1%
Asian/Pacific Islander	150,081	0.4%	15.5%	57.7%	1.3%	\$57,648 ¹	33.5% ¹
						\$53,401 ²	22.5% ²
Hispanic	555,532	1.7%	19.7%	67.3%	2.5%	\$46,816	8.7%
Total	1,967,722	0.4%	10.3%	35.0%	1.1%	\$54,021	22.1%

¹ Asian Alone

² Native Hawaiian and Other Pacific Islander Alone













Public Health













Key Findings

- **Access to healthcare an acute issue.** Nevada has the second highest uninsured population (22 percent) in the nation.
- **Nevada is severely “underhealthcared”.** With the lowest percentage of health care employees, Nevada is largely underserved by physicians (#49), registered nurses (#51), and nurse practitioners (#51).
- **Limited access may be translating into negative outcomes.** Nevada has the second highest flu and pneumonia death rate, with about 23 deaths per 100,000 population.













Health Indicator	U.S. Average	Nevada Average	Nevada Rank (1-High, 51-Low)	Nevada/U.S. Comparison
Life Expectancy (Years)	78.6	77.6	36	
Birth Rate (Per 1,000 Population)	13.0	13.3	19	
Teen Birth Rate (Ages 15-19, Per 1,000 Population)	34.2	38.6	17	
Death Rate (Per 100,000 Population)	741.1	784.8	17	
Teen Death Rate (Ages 15-19, Per 100,000 Teens)	58	66	22	
Infant Death Rate (Per 1,000 Live Births)	6.7	6.1	35	
Invasive Cancer Incidence (Per 100,000 Population)	462.1	448.6	38	
Cancer Death Rate (Per 100,000 Population)	173.2	176.4	23	
Suicide Death Rate (Per 100,000 Population)	11.8	19.1	5	
Flu and Pneumonia Death Rate (Per 100,000 Population)	16.2	22.7	2	



Health Indicator	U.S. Average	Nevada Average	Nevada Rank (1-High, 51-Low)	Nevada/U.S. Comparison
Adults with Diabetes (% Told Yes by Doctor)	9.5%	10.3%	14	
Adults who Smoke (% of Adults)	20.1%	22.9%	16	
Adults who are Overweight/Obese (% of Adults)	63.3%	60.3%	42	
Adults with Poor Mental Health (% of Adults)	35.8%	35.0%	28	
Adults who Exercise (Moderate or Vigorous Activity, % of Adults)	51.4%	52.8%	21	
Heart Disease Death Rate (Per 100,000 Population)	180.1	191.8	17	
Uninsured Population (% of Population)	16%	22%	2	
Immunization Rate (% of Children Ages 19-35 Months)	75%	67%	48	
Medicare Beneficiary Rate (% of Population)	16%	14%	43	
Population Living in Poverty (% of Population Under 100% of FPL)	20%	21%	15	



Health Indicator	U.S. Average	Nevada Average	Nevada Rank (1-High, 51-Low)	Nevada/U.S. Comparison
Growth in Monthly Food Stamp Benefits (% Change July 2011-2012)	2.9%	3.2%	22	
Homeless Rate (% of Population)	0.21%	0.54%	2	
Incarceration Rate (Per 100,000 U.S. Residents)	497	472	13	
Firearms Death Rate (Per 100,000 Population)	10.1	15.5	8	
Healthcare Employment (% of Total Employment)	9.2%	6.4%	51	
Physicians (Per 10,000 Civilian Population)	25.7	18.5	49	
Registered Nurses (Per 100,000 Population)	874	605	51	
Physician Assistants (Per 100,000 Population)	27	23	34	
Nurse Practitioners (Per 100,000 Population)	58	26	51	
Dentists (Per 10,000 Civilian Population)	6.0	5.0	34	













Public Safety



Key Findings

- **Crime rate statistics mixed**. Compared to the U.S. average, the Las Vegas MSA has a higher overall violent crime rate and a lower overall property crime rate.
- **Crime rates higher in most major categories**. Larceny-thefts is the only crime where the Las Vegas MSA had a lower rate of occurrence (1,496 vs. 1,977 larceny-thefts per 100,000 inhabitants). The region was higher than the national average in every other category.
- **Crime rate data trending toward improvement**. The number of crimes in the Las Vegas MSA has been declining over the last 1-, 5-, and 10-year periods.



Type of Crime	U.S. Total	Las Vegas MSA Total	U.S. Rate (Per 100,000 Inhabitants)	Las Vegas MSA Rate (Per 100,000 Inhabitants)	Las Vegas MSA/U.S. Comparison
<u>Violent Crime</u>	1,203,564	12,732	386.3	647.0	
Murder and Non-negligent Manslaughter	14,612	93	4.7	4.7	
Forcible Rape	83,425	769	26.8	39.1	
Robbery	354,396	3,764	113.7	191.3	
Aggravated Assault	751,131	8,106	241.1	411.9	
<u>Property Crime</u>	9,063,173	53,676	2,908.7	2,727.8	
Burglary	2,188,005	15,978	702.2	812.0	
Larceny-theft	6,159,795	29,435	1,976.9	1,495.9	
Motor Vehicle Theft	715,373	8,263	229.6	419.9	
All Crimes	10,266,737	66,408	3,294.9	3,374.9	



Type of Crime	U.S. Growth 1-Year	Las Vegas MSA 1-Year	U.S. Growth 5-Year	Las Vegas MSA 5-Year	U.S. Growth 10-Year	Las Vegas MSA 10-Year*
<u>Violent Crime</u>	-3.8%	-14.5% ●	-16.1%	-17.9% ●	-16.4%	25.5% ●
Murder and Non-negligent Manslaughter	-0.7%	-29.0% ●	-15.6%	-48.6% ●	-8.9%	-46.2% ●
Forcible Rape	-2.5%	-0.9% ●	-11.7%	-9.0% ●	-8.2%	23.6% ●
Robbery	-4.0%	-19.8% ●	-21.1%	-40.2% ●	-16.3%	-14.4% ●
Aggravated Assault	-3.9%	-12.8% ●	-14.1%	-1.0% ●	-17.4%	63.7% ●
<u>Property Crime</u>	-0.5%	-5.9% ●	-9.5%	-32.3% ●	-13.2%	-15.4% ●
Burglary	0.9%	-9.1% ●	-0.3%	-18.0% ●	3.4%	2.8% ●
Larceny-theft	-0.7%	-4.5% ●	-7.0%	-17.9% ●	-13.1%	-14.6% ●
Motor Vehicle Theft	-3.3%	-4.1% ●	-40.3%	-65.5% ●	-41.8%	-38.5% ●
All Crimes	-0.9%	-7.7% ●	-10.4%	-29.9% ●	-13.6%	-9.8% ●

* 2001 was Las Vegas, NV-AZ MSA and included Clark and Nye Counties, NV and Mohave County, AZ



Community Development



Key Findings

- **Southern Nevada's development pattern is relatively dense.** At an average of 8.35 residential units per developed acre, southern Nevada ranks among the highest density MSA in the United States.
- **Development remains well below peak levels.** Although rising in recent months, development activity remains limited. Out-of-work construction workers continue to contribute disproportionately to the region's unemployment rate.
- **Region shifting toward renter occupancy.** Homes are becoming increasingly occupied by renters (53.7 percent for all residential homes and 41.4 percent for single-family homes).
- **Denser development and newer development help southern Nevada be more resource efficient.** Nevadans consume less overall energy than the U.S. average, and are returning to peak renewable energy consumption. Southern Nevadans in particular are continuing to decrease their water consumption to meet established conservation goals.



Indicators	Las Vegas MSA	Trend
Total Acres Developed (Acres)	195,198 (0.6% Growth Y-O-Y)	Below 2005 Peak Growth Rate of 5.9%
Population Density (Persons Per Developed Acre)	10.2	Stable
Residential Development Density (Residential Units Per Residential Acre)	8.35 (0.1% Growth Y-O-Y)	Increasing, but Below 2007 Peak Growth Rate of 1.3%
Residential Units Permitted (Past 12 Months)	7,361	83% Below May 2006 Peak
Commercial Value Permitted (Past 12 Months)	\$277,323,628	89% Below November 2007 Peak
Percentage of Homes Renter-Occupied	53.7% (All Residential) 41.4% (Single Family Residential)	Increasing
Jobs-Housing Balance (Jobs Per Housing Unit)	0.95	Below U.S. Average of 0.99
Acres of Parkland (Per 1,000)	5.4	Well Below MSA Average for 2008-2012 of 18.6



Indicators	Las Vegas MSA	Trend
Gasoline Consumption (Taxable Gasoline Sales, in Gallons)	739,894,907	9% Below October 2007 Peak
Average Number of Cars Owned (Per Worker)	0.84	Higher than U.S. Average of 0.81
Average Commute Times (Minutes)	24.5	Lower than U.S. Average of 25.5
Total Number of Lane Miles (Per Capita)	0.005	----
Average Congestion (Annual Delay Per Peak Auto Commuter, in Person-Hours)	28	Below Large Urban Area Average of 31
Airport Passenger Counts (Emplaned and Deplaned Passengers)	41,701,451	13% Below October 2007 Peak
Water Consumption (Gallons Per Capita Per Day, GPCD)	222	Decreasing (To Meet Goals of 199 GPCD by 2035)
Total Energy Consumption (Million Btu Per Capita)	238.9*	Rank 41, Below U.S. Average of 315.9
Renewable Energy Consumption (Million Btu Per Capita)	21.7*	Returning to Peak Levels

*Only statewide figures available



Concentrations of Community Risk



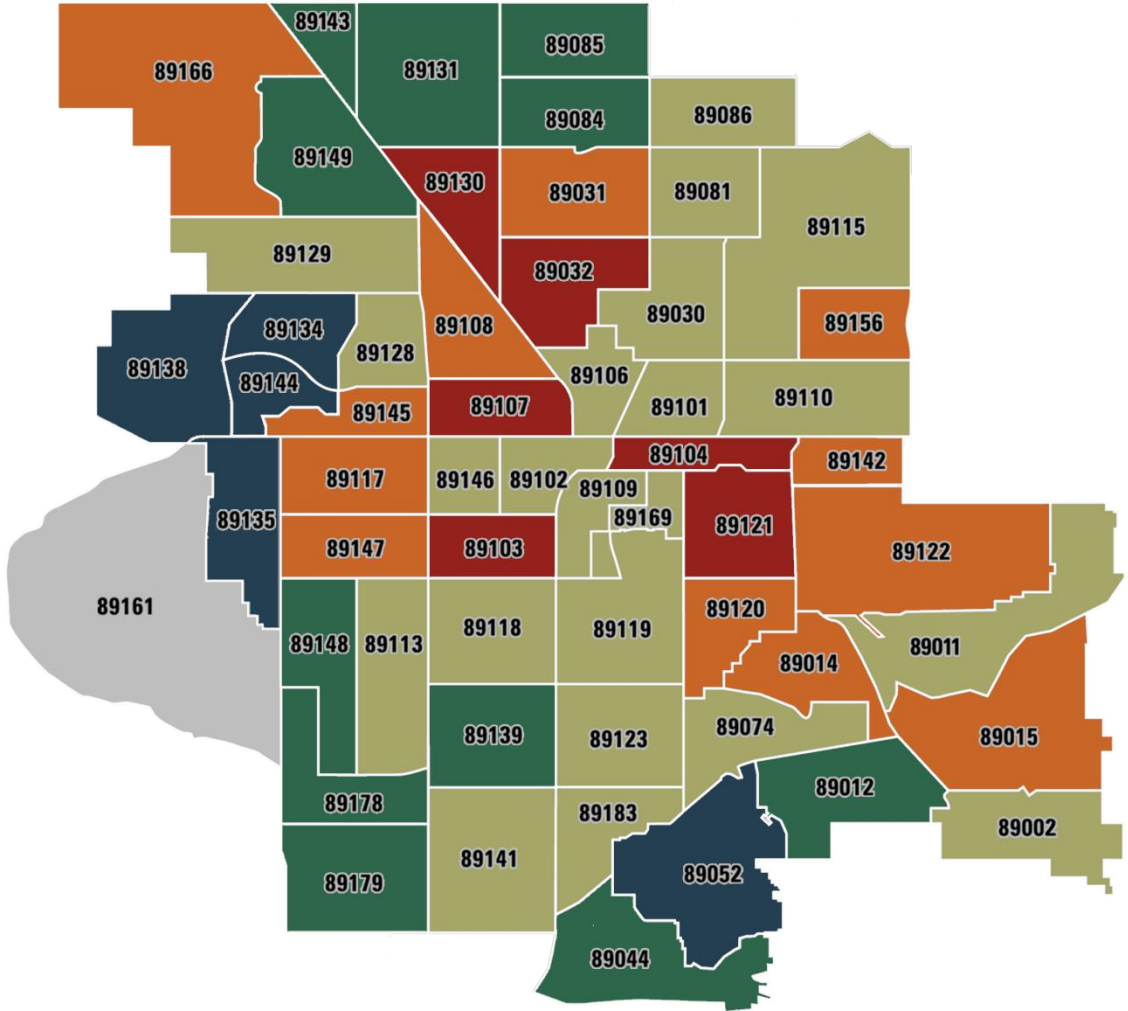
Key Findings

- **High concentrations of at-risk households.** TANF, SNAP, and Medicaid recipients are highest in the urban core of the valley.
- **Housing market remains unstable.** Foreclosures are highest in the outlying portions of the urban valley, particularly in the north/northwest and southwest.
- **High levels are residential and commercial vacancies are affecting the neighborhood quality.** Residential vacancies are highest in the urban core (notable exceptions are 89166, 89178, and 89011), while commercial vacancies are spread out mostly in the southern half of the urban valley.



Unemployment Insurance

Valley-wide Distribution Map

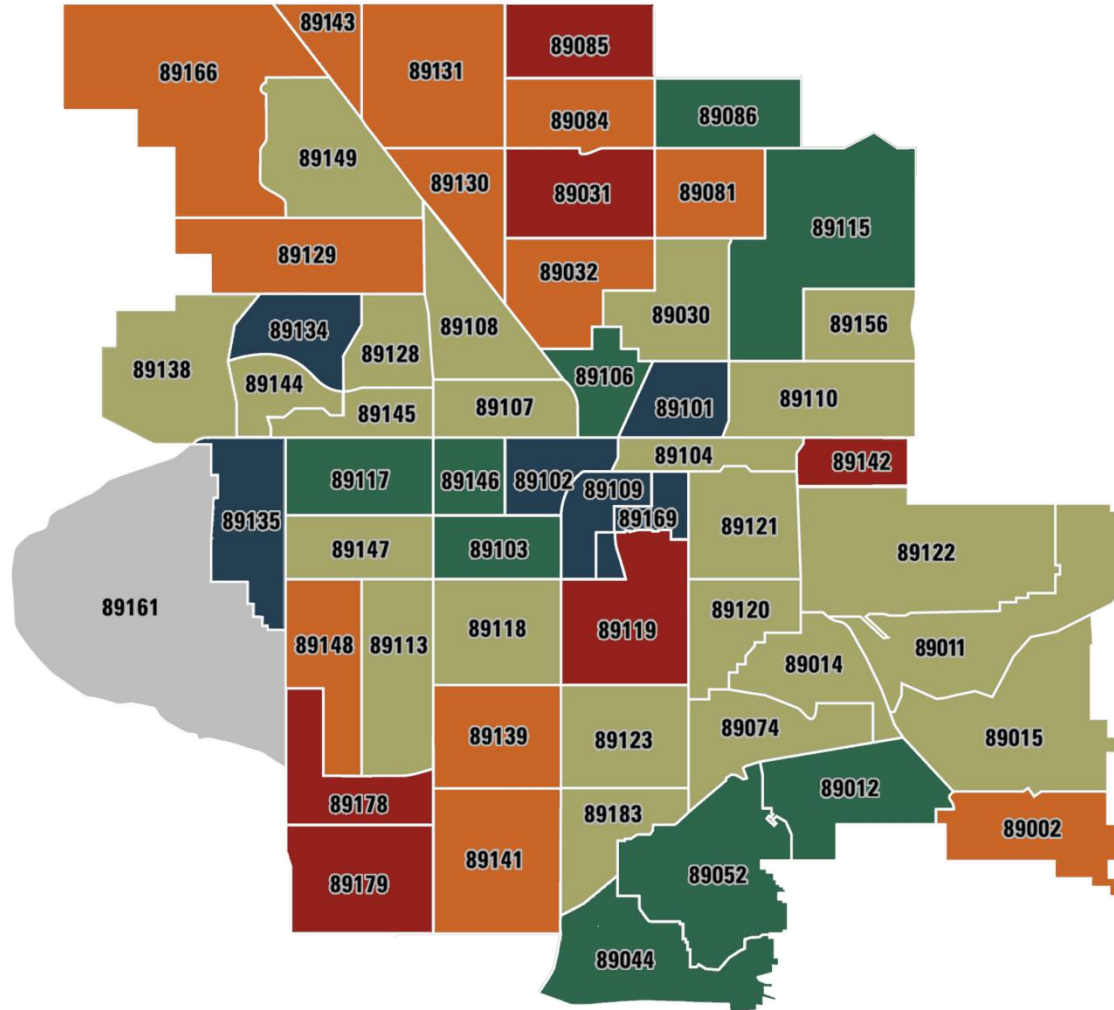


- Low
- Medium-Low
- Medium
- Medium-High
- High



Foreclosures

Valley-wide Distribution Map

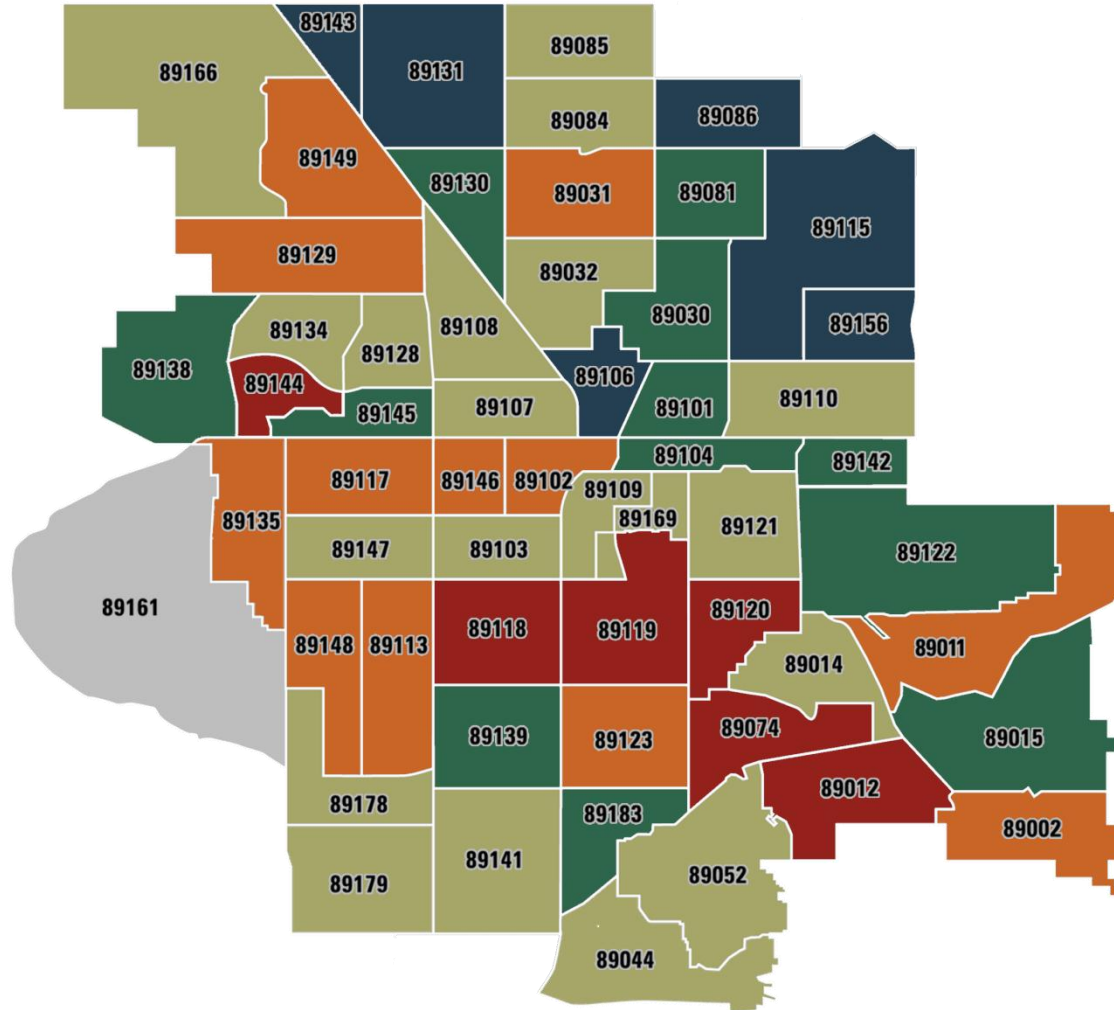


- Low
- Medium-Low
- Medium
- Medium-High
- High



Commercial Vacancies

Valley-wide Distribution Map

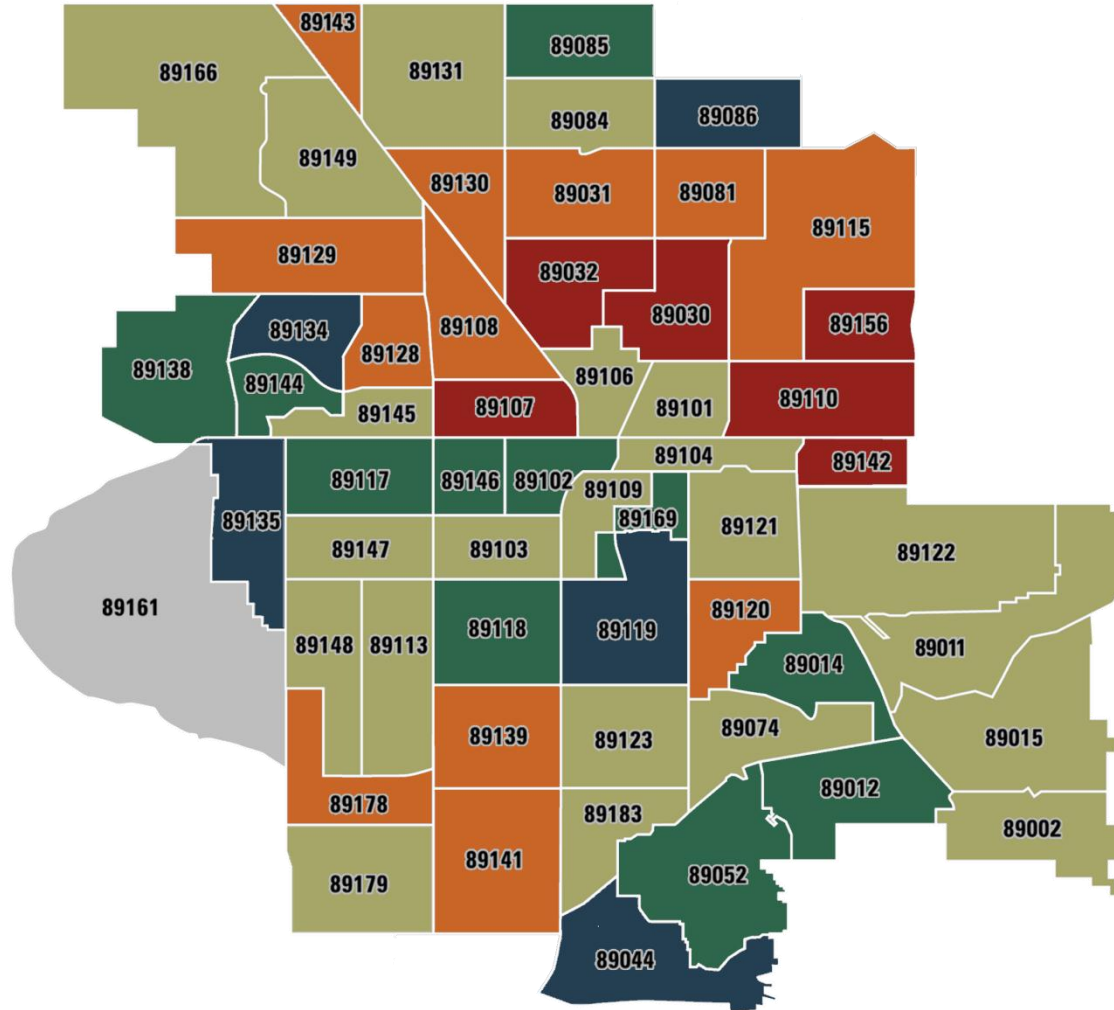


- Low
- Medium-Low
- Medium
- Medium-High
- High



Bank Owned Homes

Valley-wide Distribution Map

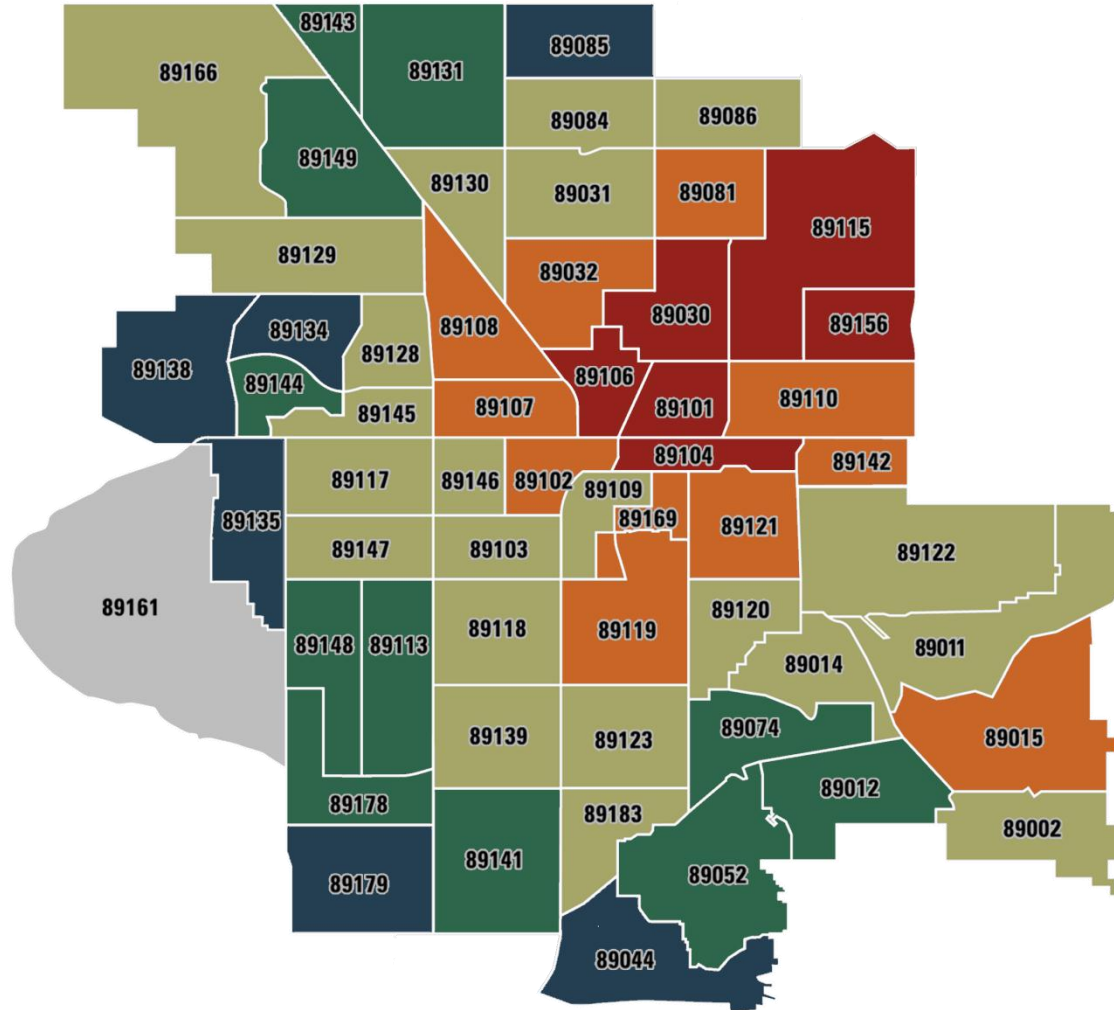


- Low
- Medium-Low
- Medium
- Medium-High
- High



TANF Recipients

Valley-wide Distribution Map

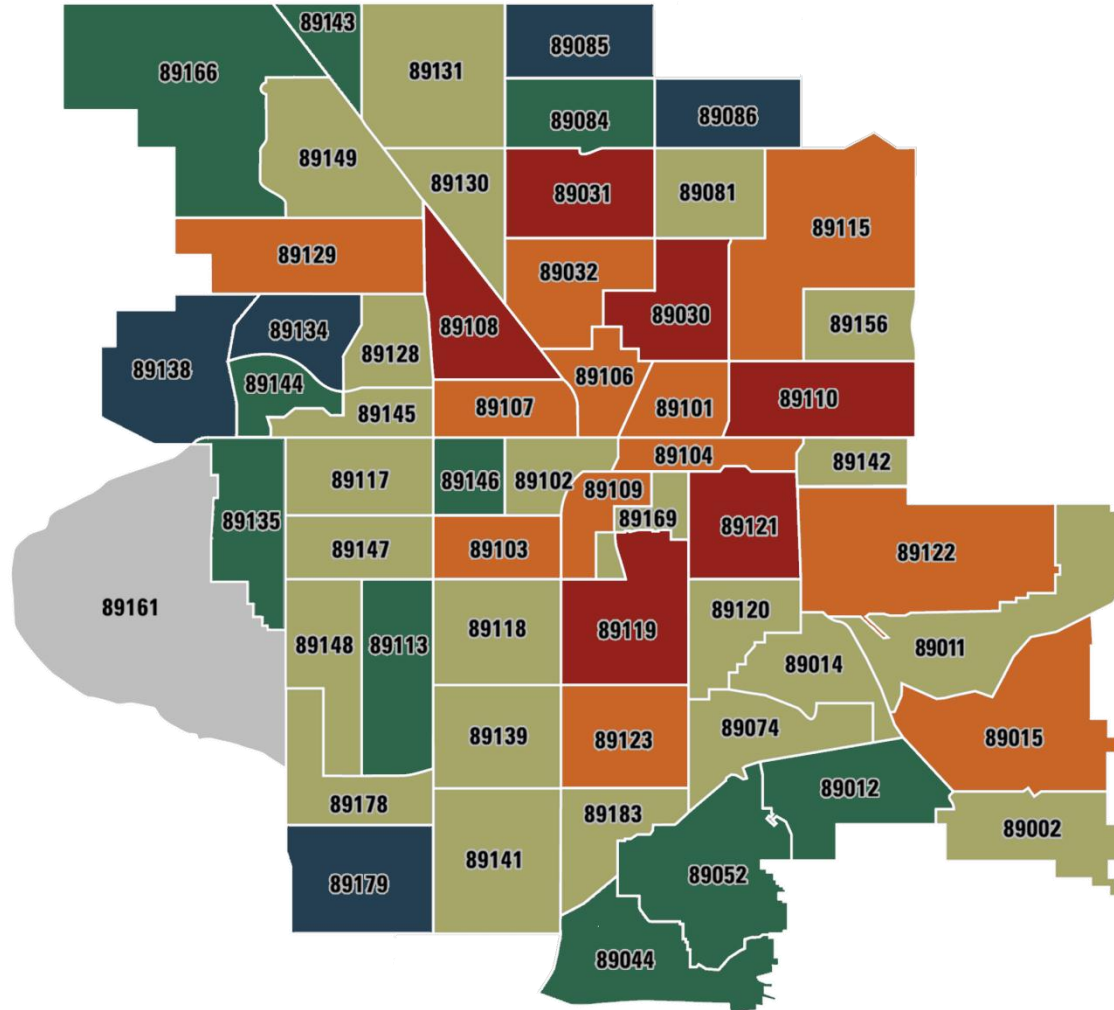


- Low
- Medium-Low
- Medium
- Medium-High
- High



Composite Risk

Valley-wide Distribution Map

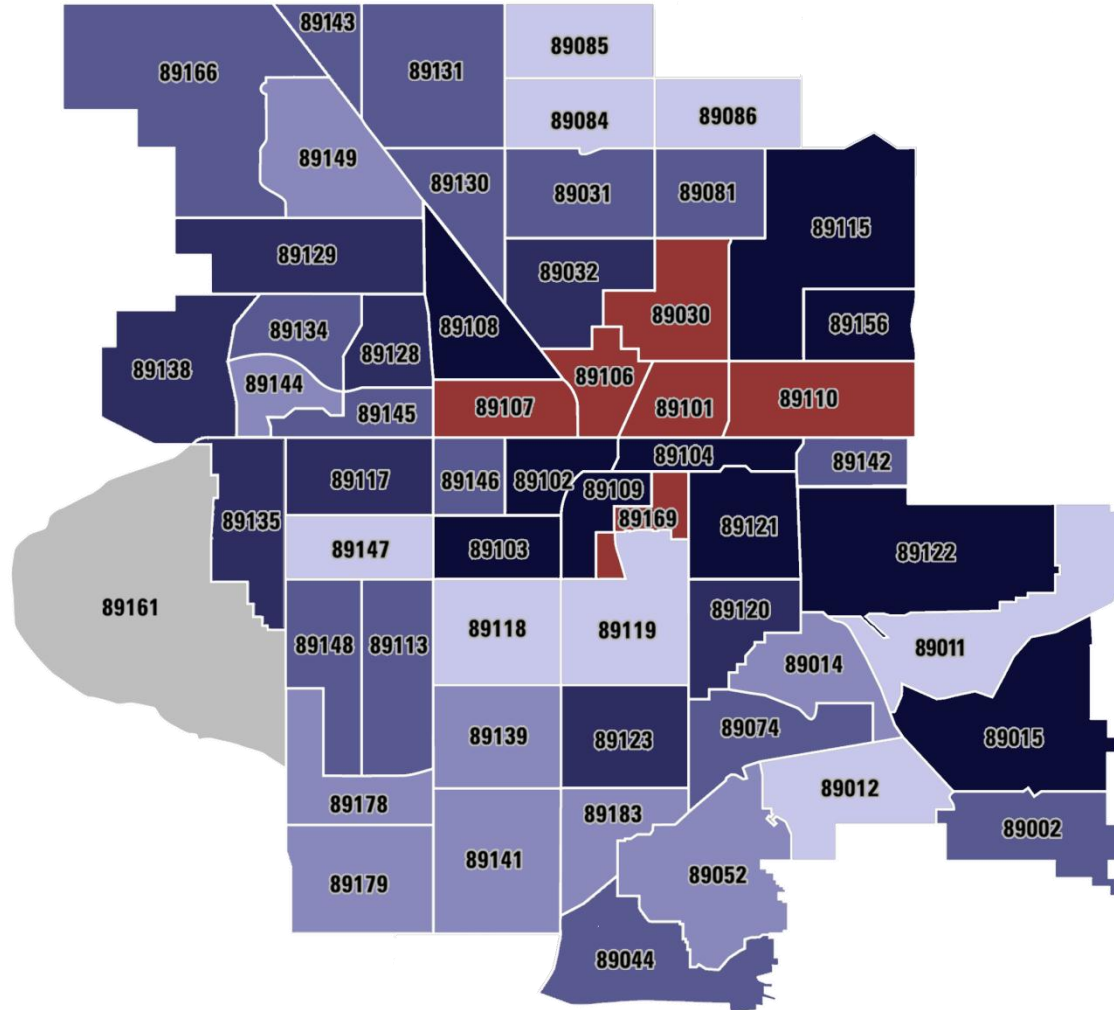


- Low
- Medium-Low
- Medium
- Medium-High
- High



Food Insecurity

Valley-wide Distribution Map



Sustainable Communities

