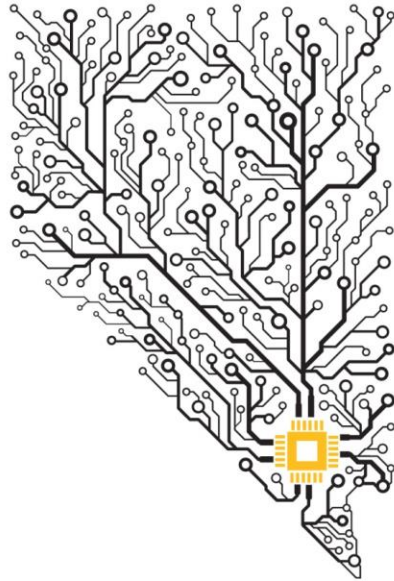




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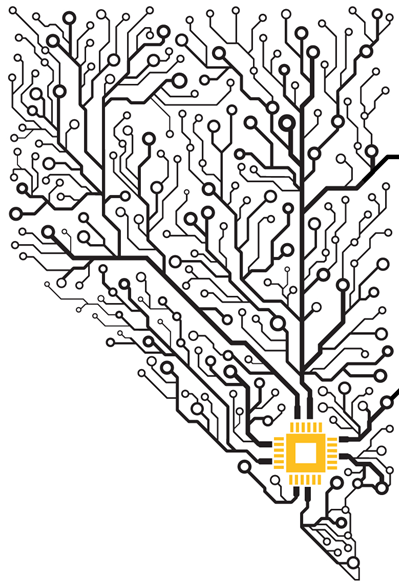
JEREMY AGUERO

PRINCIPAL ANALYST

APPLIED ANALYSIS

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2013 LAS VEGAS PERSPECTIVE

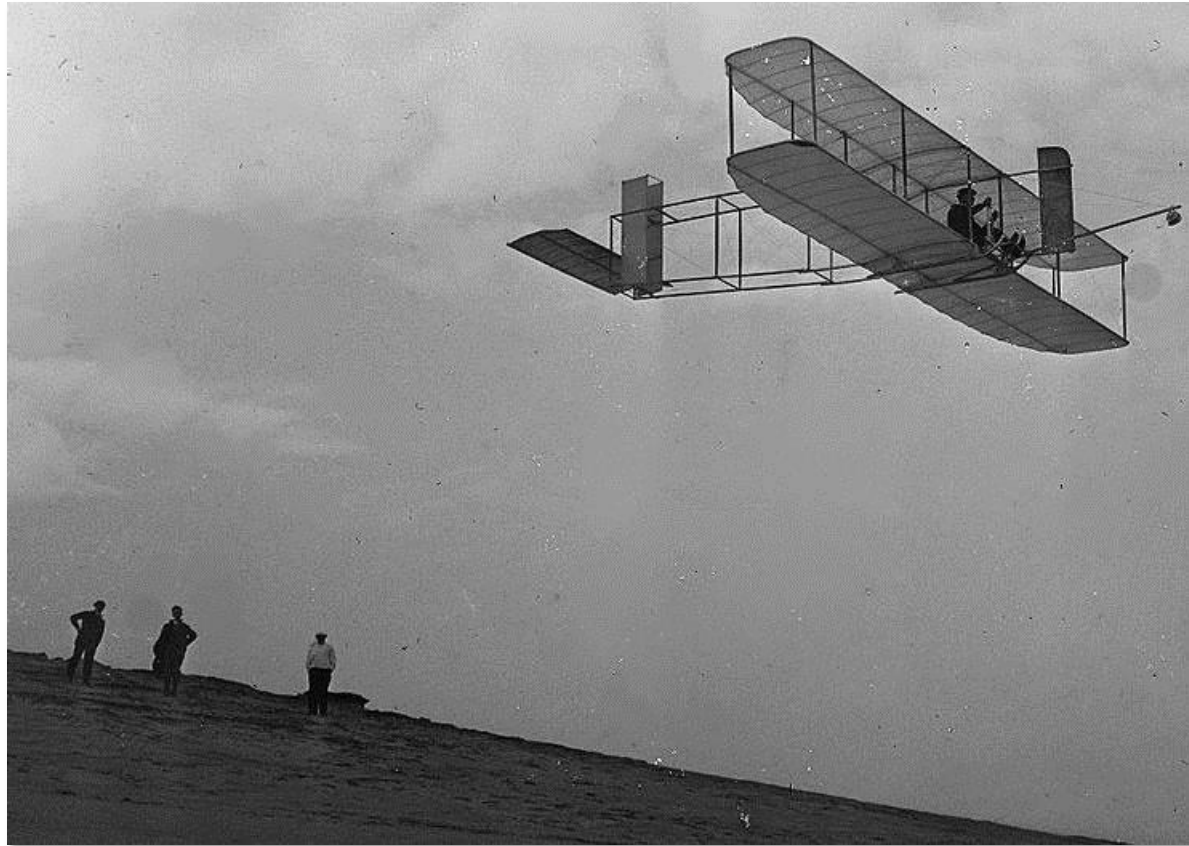
APRIL 4, 2013
FOUR SEASONS LAS VEGAS



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LAS VEGAS
PERSPECTIVE

1903

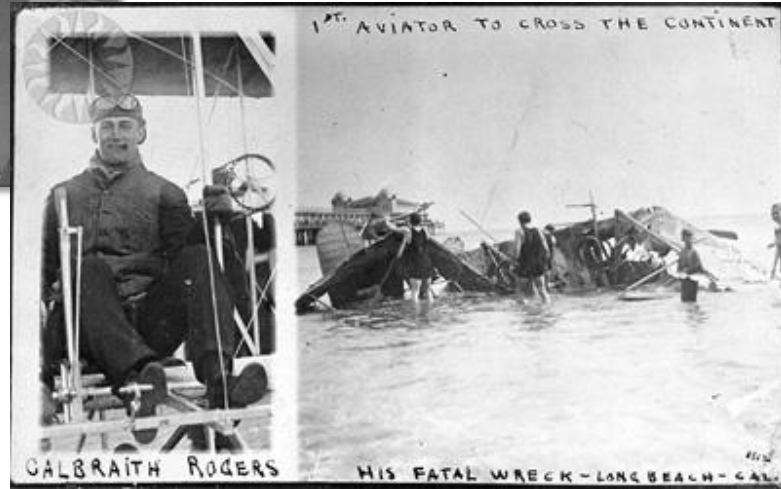




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1911

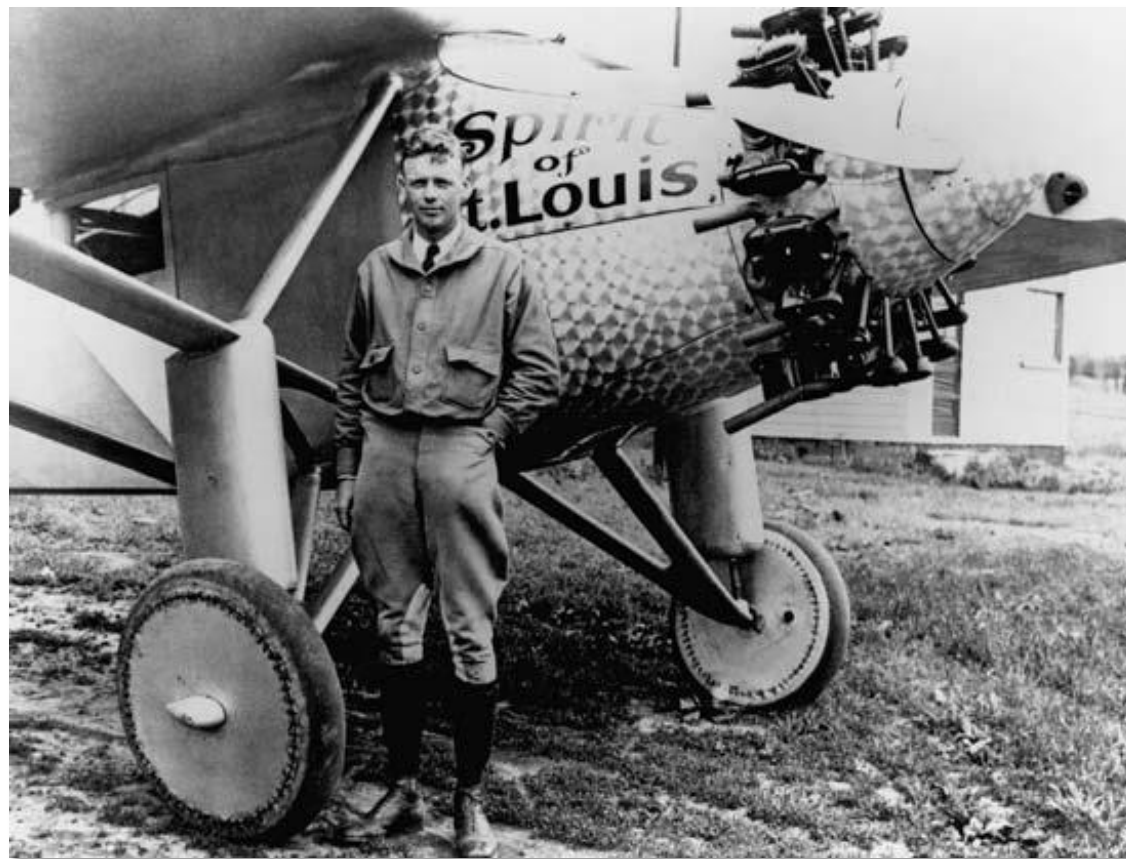




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PERSPECTIVE

1927



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1929



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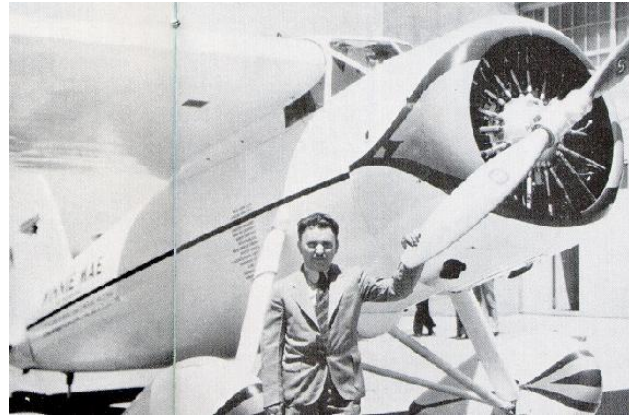
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1933





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1947





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1961



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1969

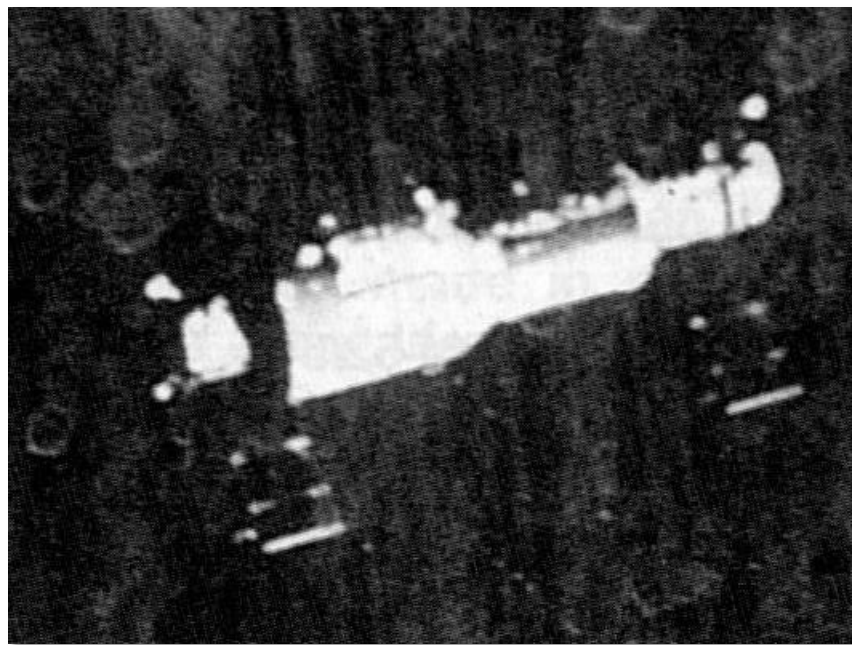




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1971





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1981

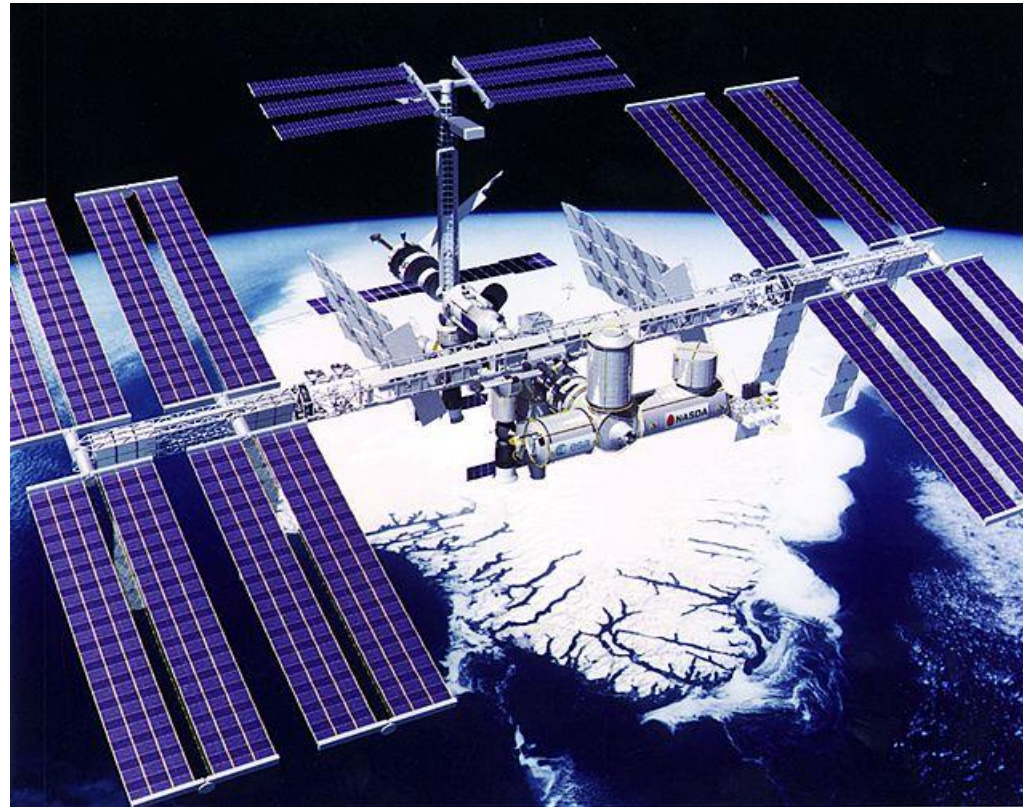




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2000





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Moore's Law: Computer power doubles every eighteen months

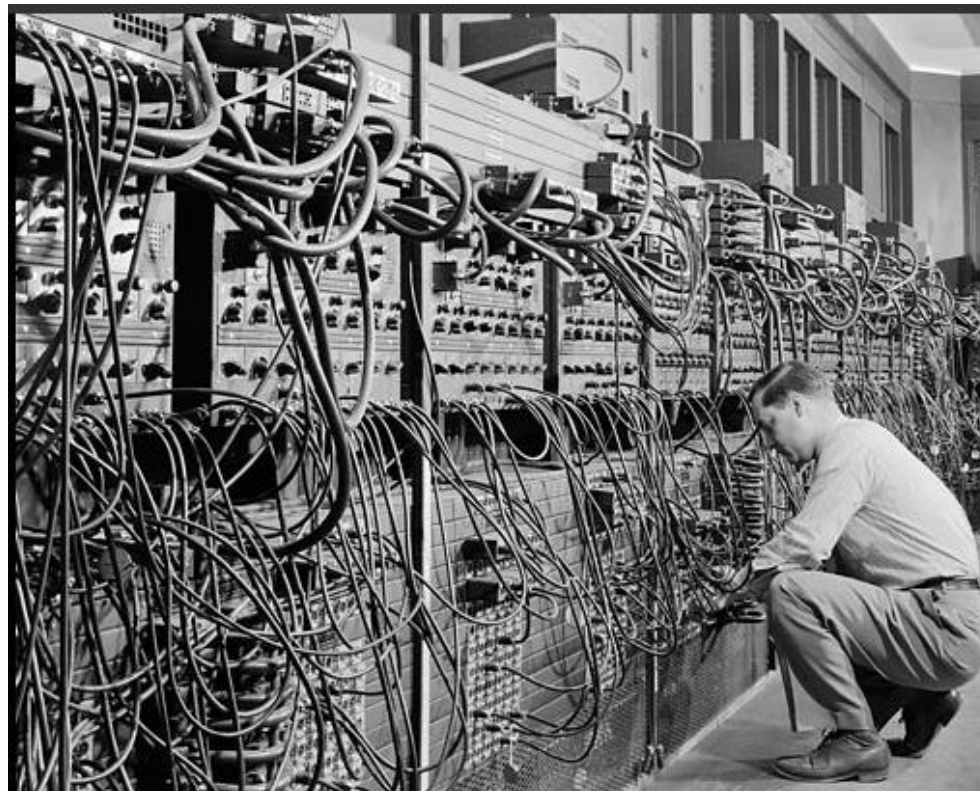
-- Gordon Moore, Intel Corporation (1965)



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1946



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77%

*-- Economic and Statistics Administration,
US Department of Commerce (Nov. 2011)*



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1983



2008





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without....**

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**Not without its
challenges....**



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WE INVENTED THE COMPETITION.

These are the leading heads of state...
 Now the fact that the other major...
 The bottom line for the Sony...
SONY
 THE LEADER SINCE 1946

**Beta before.
Beta now.
Beta later.**

Our commitment to the Beta format is as strong as ever...
 Beta is a proven success...
 • Beta is the world's first...
 • Beta 44-FF...
theBetaMakers

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There were 2.4 billion Internet users in 2012

-- Pingdom (2013)



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160B

144B

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43%

-- Pingdom (2013)



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The number of mobile devices exceeded the world's population in 2012

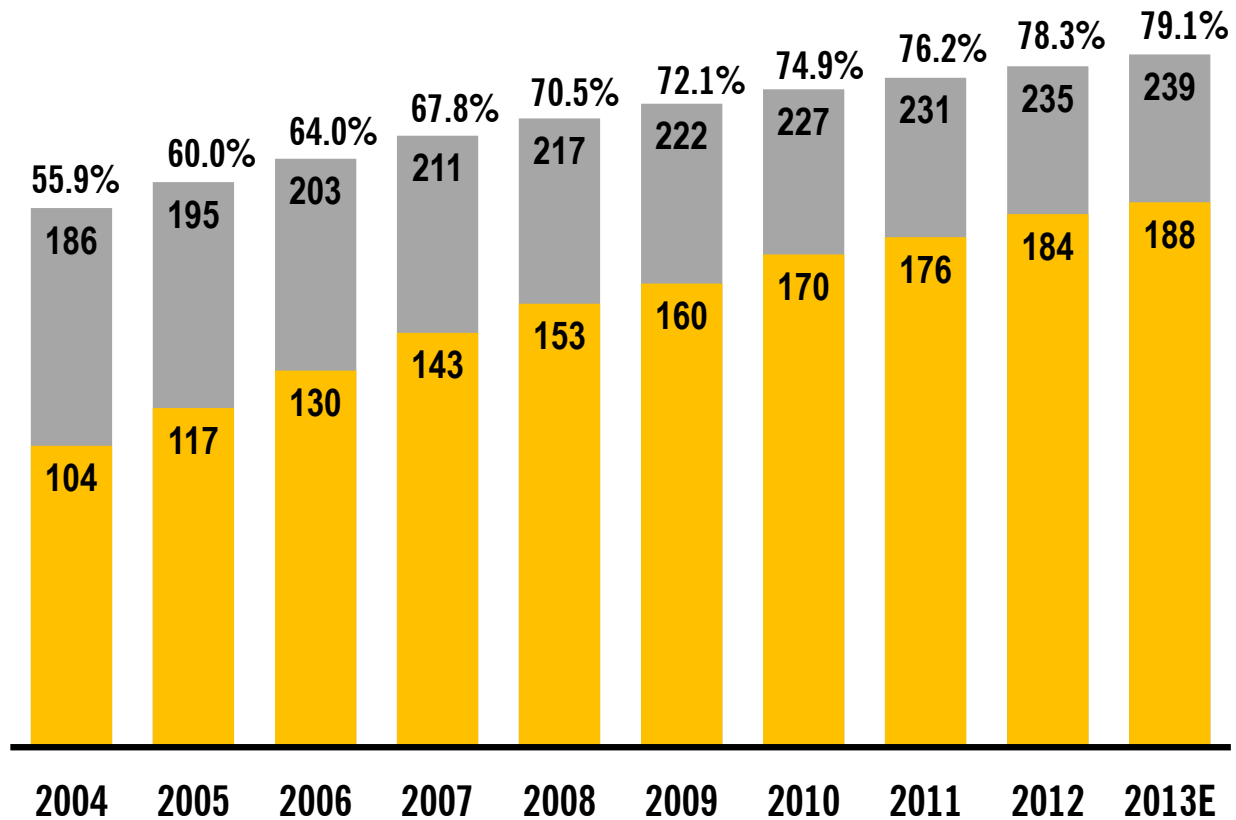
-- Cisco, Visual Networking Index Global Mobile Data Traffic Forecast Update



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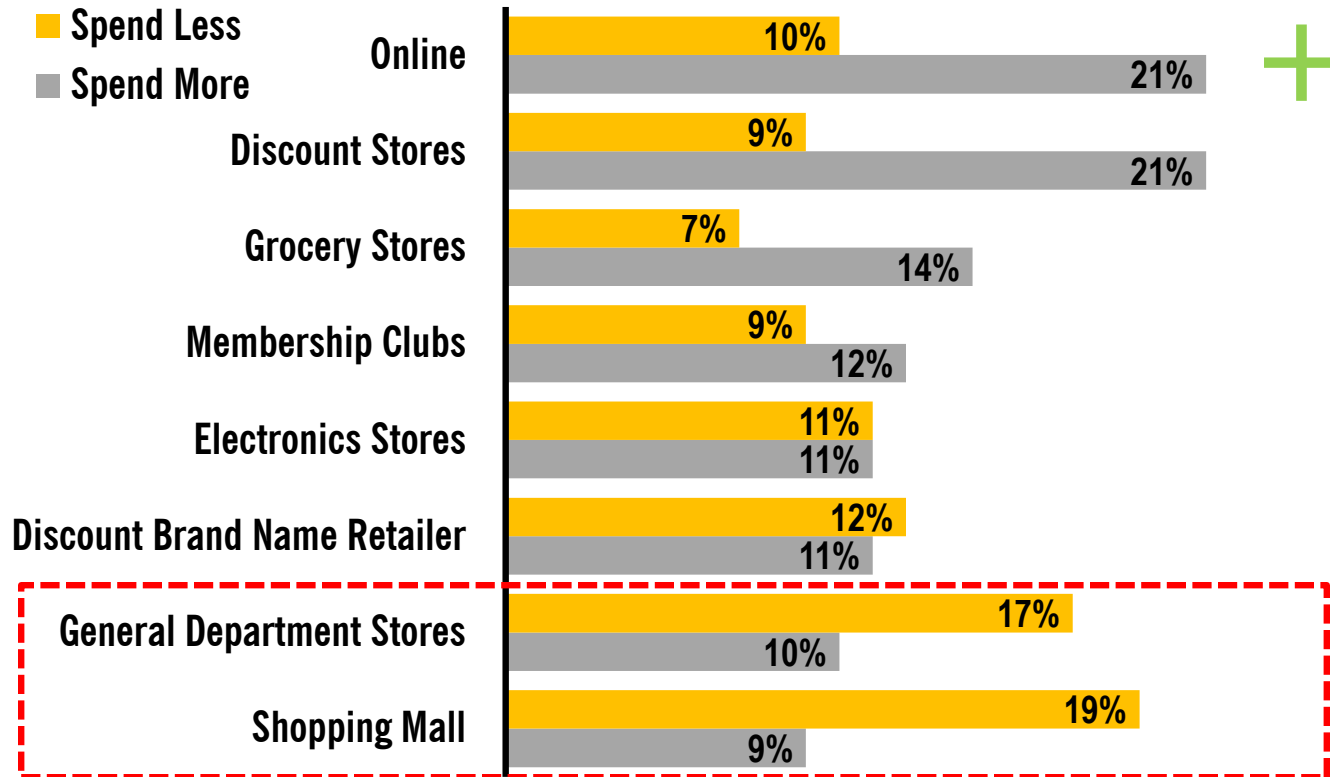
United States Internet Use



Source: US Department of Commerce



Consumer Spending Trends



Source: Forrester, Online Retail Forecast



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- 1. Amazon.com Inc.**
- 2. Staples Inc.**
- 3. Apple Inc.**
- 4. Walmart.com**
- 5. Dell Inc.**
- 6. Office Depot Inc.**
- 7. Liberty Interactive Corp.**
- 8. Sears Holdings Corp.**
- 9. Netflix Inc.**
- 10. CDW Corp.**



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**Over 1 million domain
names are registered
every month**

-- CNET 2012



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634M



51M

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**More than half of all web
traffic is sourced to
other computers (bots)**

-- Incapsula (2012)



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In early 2005, more households in China had DVD players than hot and cold running water

-- The Guardian, Jan 4, 2005

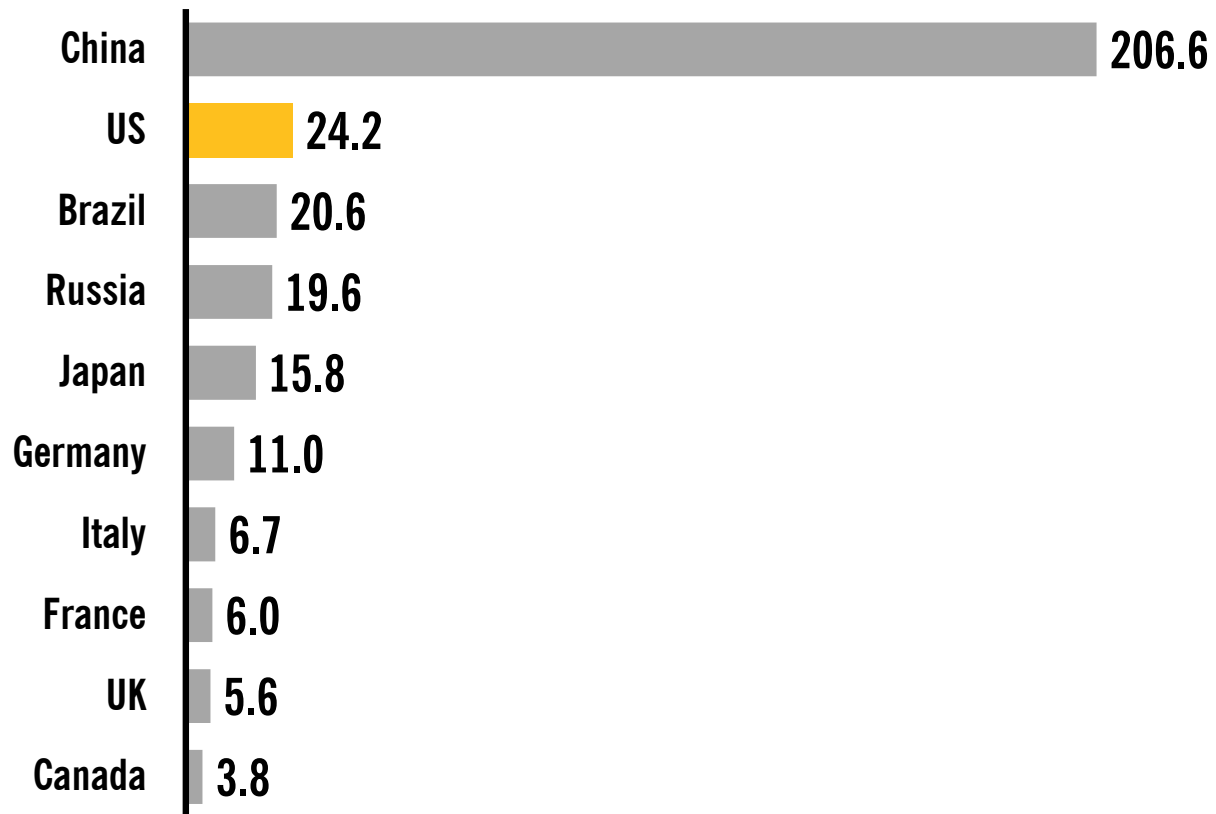


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Industrial Employment

(in millions)



Source: United Nations Conference on Trade and Development

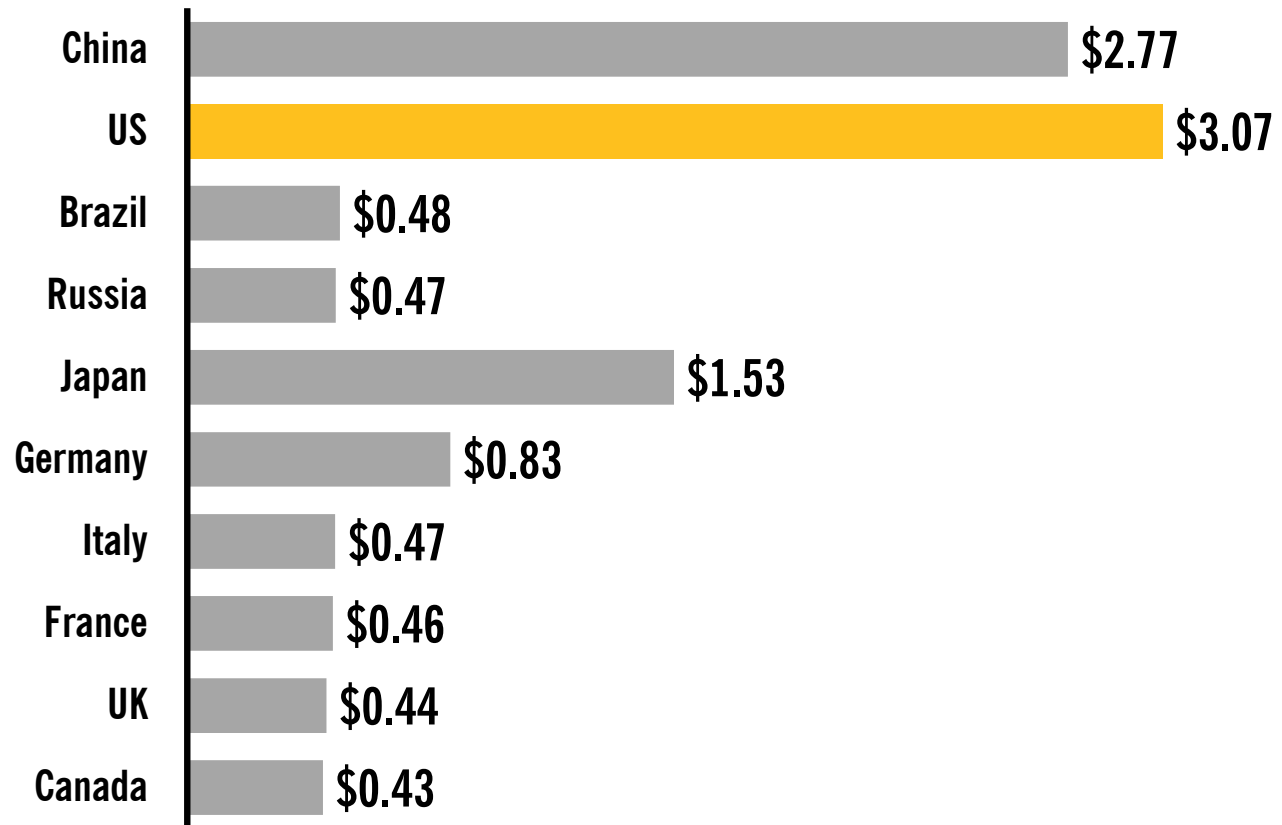


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Industrial Production

(in trillions)



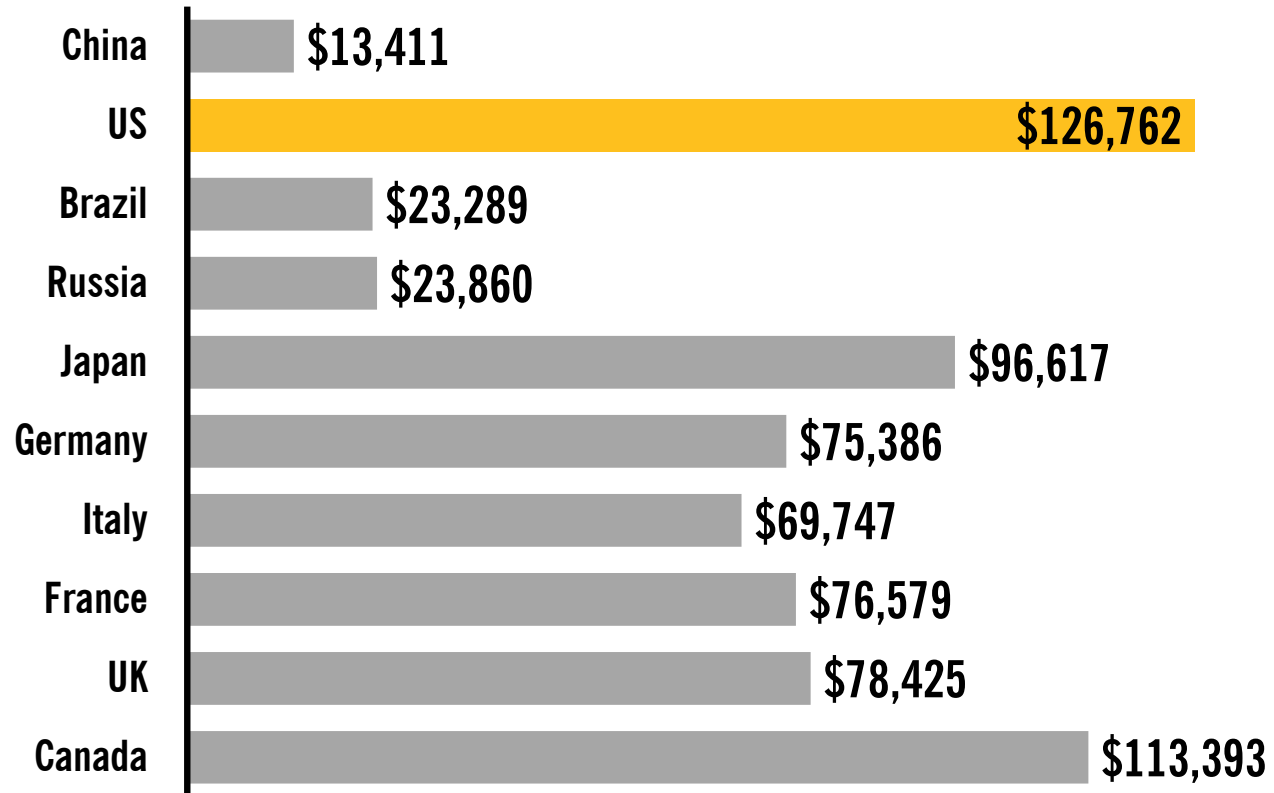
Source: United Nations Conference on Trade and Development



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Industrial Output Per Worker



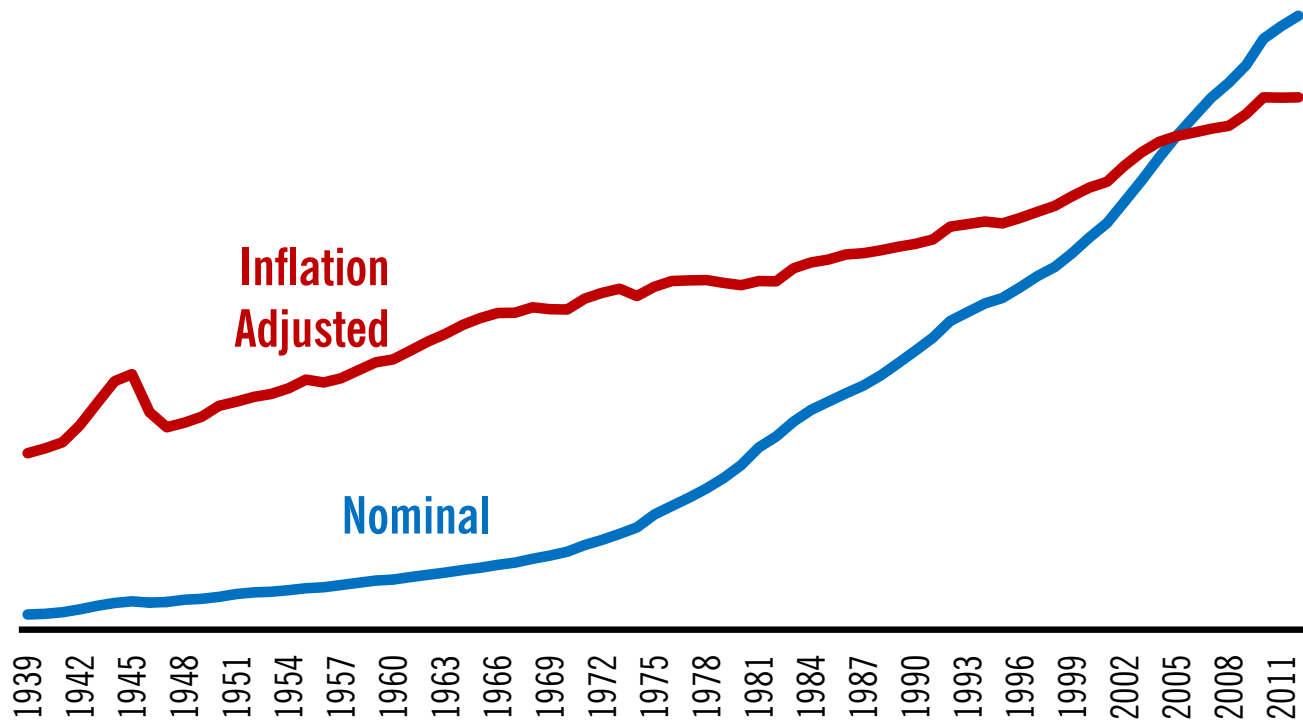
Source: United Nations Conference on Trade and Development



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US Productivity Per Worker



Source: United Nations Conference on Trade and Development



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EXTRA!!

SOUTHERN NEVADA'S LEADING DAILY
Las Vegas Evening Review
AND JOURNAL

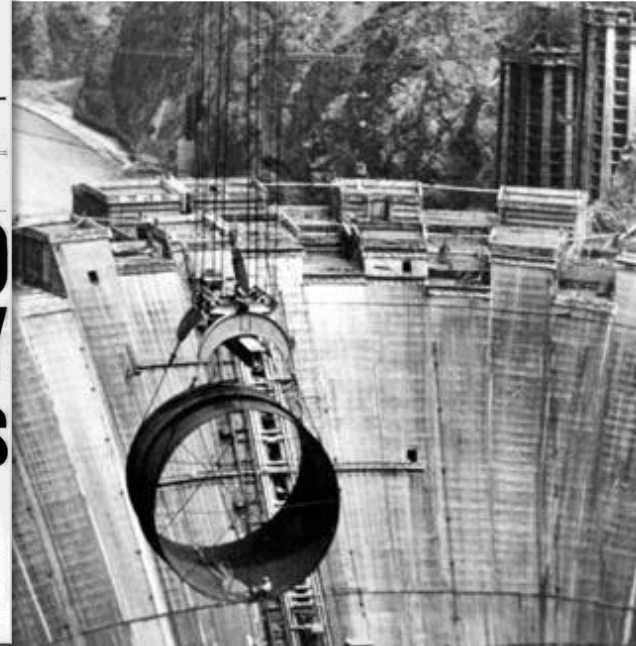
DAM IS OKEHED BY SENATE BODY COMMITTEE APPROVES

WASHINGTON, June 21. (United Press) The senate appropriations committee today approved the \$10,600,000 Boulder dam fund included in the second deficiency appropriation bill, upon report of the sub-committee appointed to consider this item.

This action was taken after Senator Carl Hayden of Arizona had appeared

before the committee in executive session and entered a vehement protest against the appropriation.

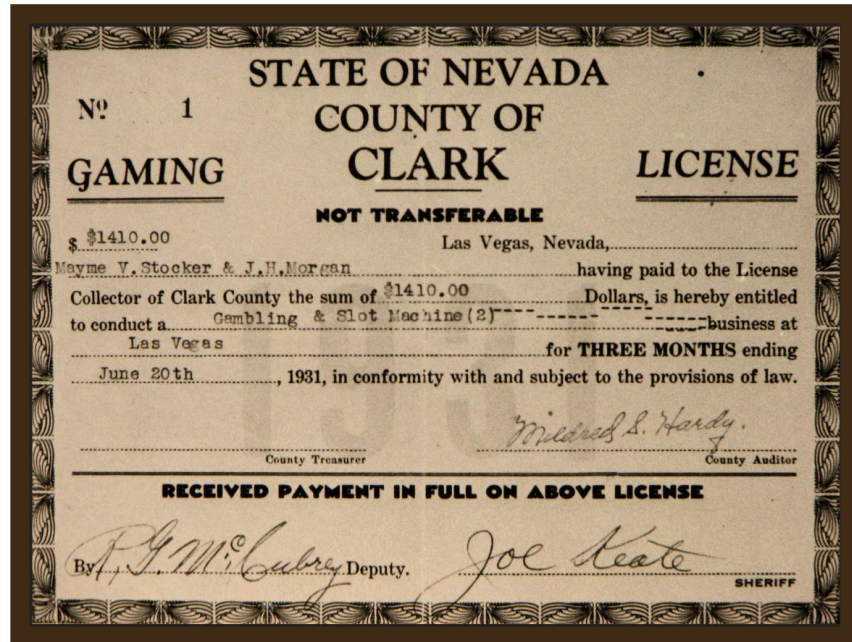
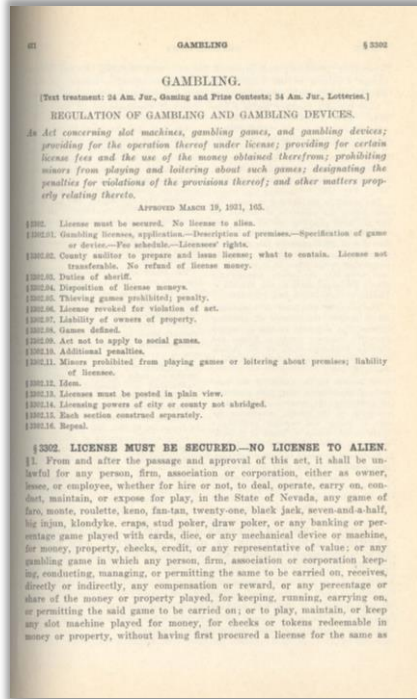
This invites a favorable report of the measure to the senate, and it is believed possible that the bill may be presented to the upper house for action today, with a favorable recommendation.





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SIEGEL, GANGSTER, IS SLAIN ON COAST

Co-chief of 'Bug and Meyer Mob'
Here Is Victim of Shots Fired
Through Window

Special in THE NEW YORK TIMES

LOS ANGELES, Calif., June 21 — Benjamin Siegel, 42 years old, former New York gangster, was slain last midnight by a fusillade of bullets fired through the living room window of a Beverly Hills house where he was staying.

Siegel, who with Meyer Lansky, headed a "strong-arm" group that collaborated with Louis (Lepke) Buchalter, Jacob (Gurrah) Shapiro and other underworld combinations, shifted his base nearly a decade ago. It was generally believed here that he was keeping an important finger in the undercurrent of racketeering in wealthy motion picture, sports and gambling circles. He had been one of the principals in the lavish Flamingo Club at Las Vegas, Nev., where many Hollywood notables ramble.

VICTIM OF GUNMAN



Benjamin Siegel

Associated Press





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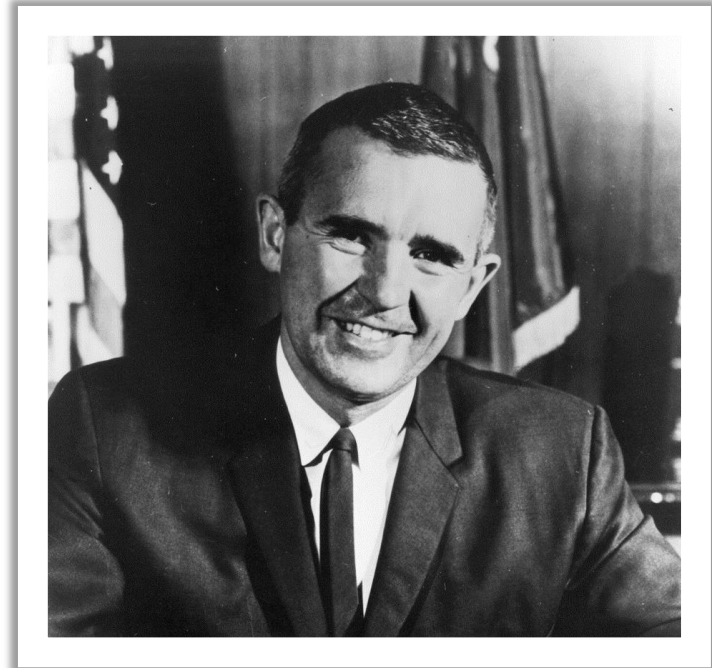
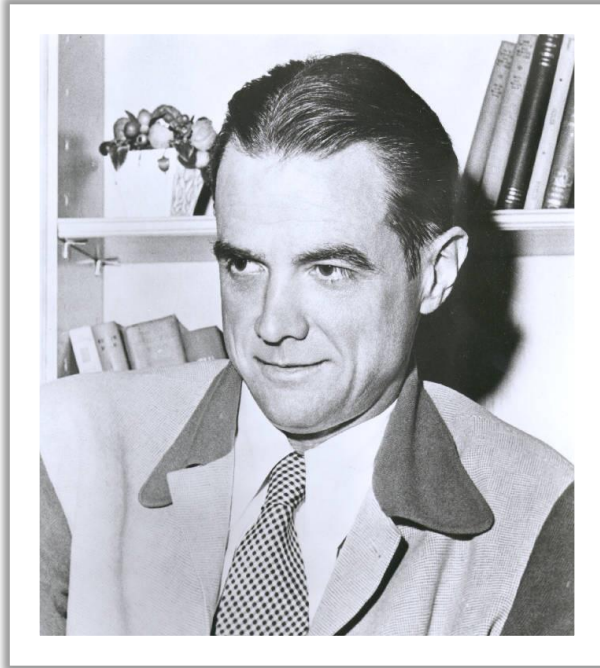
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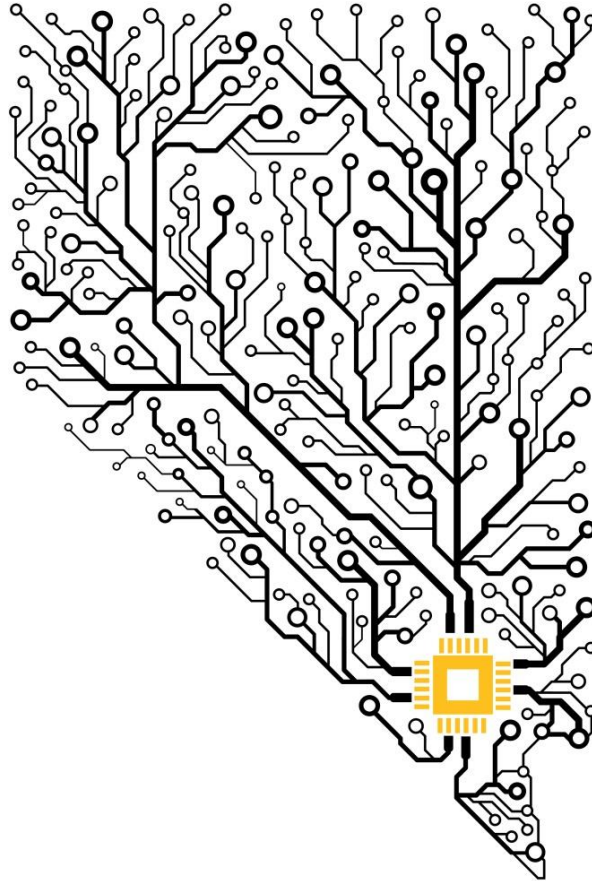
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Demographics

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2,008,654

Page: 2



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1.7%

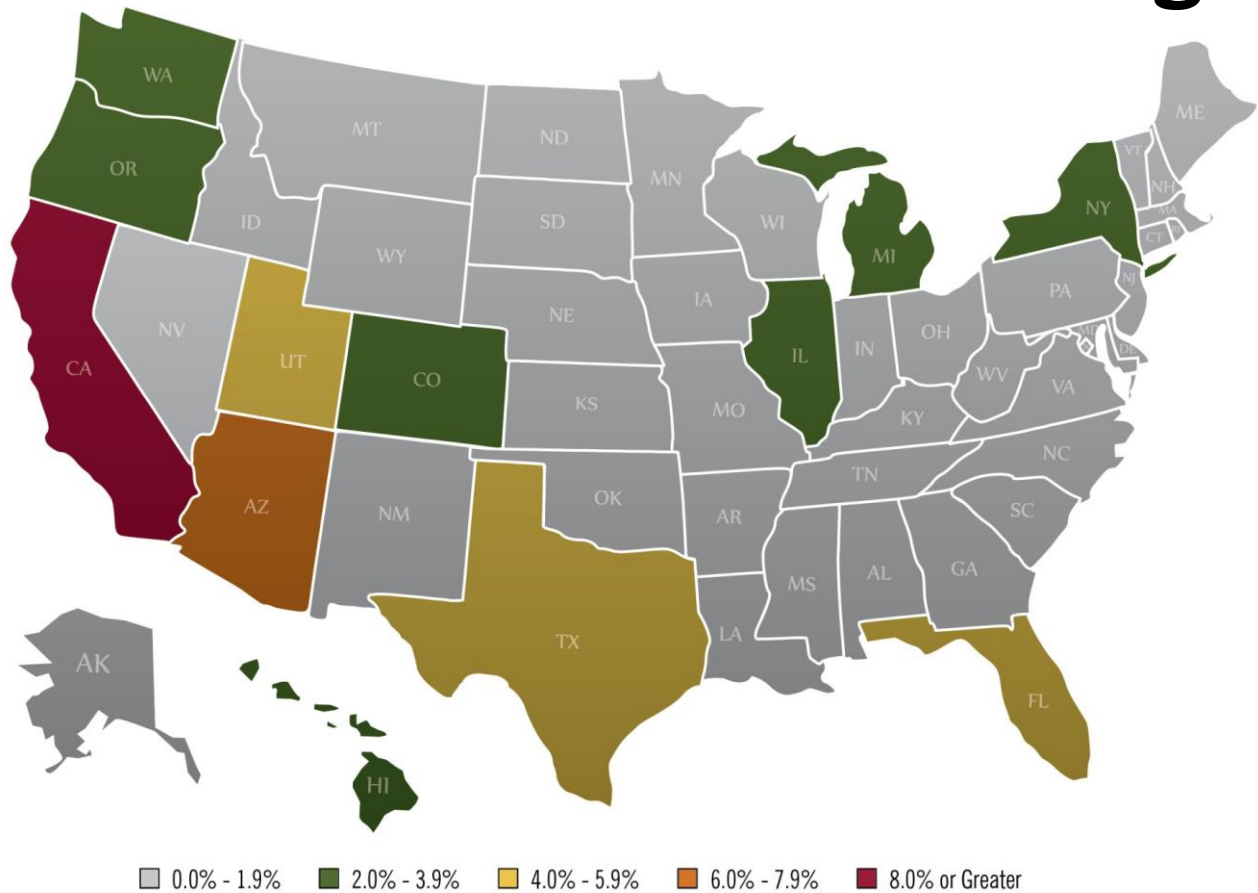
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State of Origin



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37.0

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46.0%



30.4%

Page: 4



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30.5%

Page: 4



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37.2%

Page: 8



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\$64,613

\$61,439

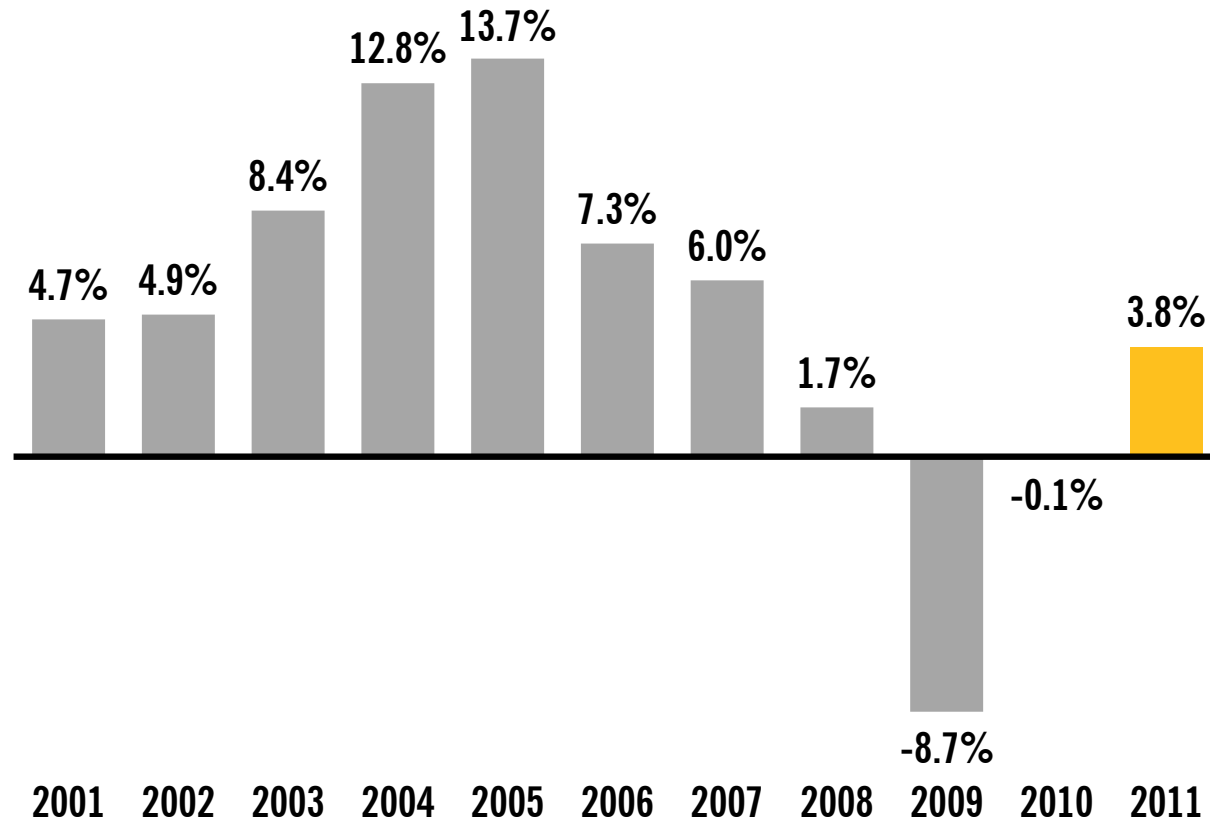
Pages: 4-5



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Las Vegas MSA Personal Income Growth Rates





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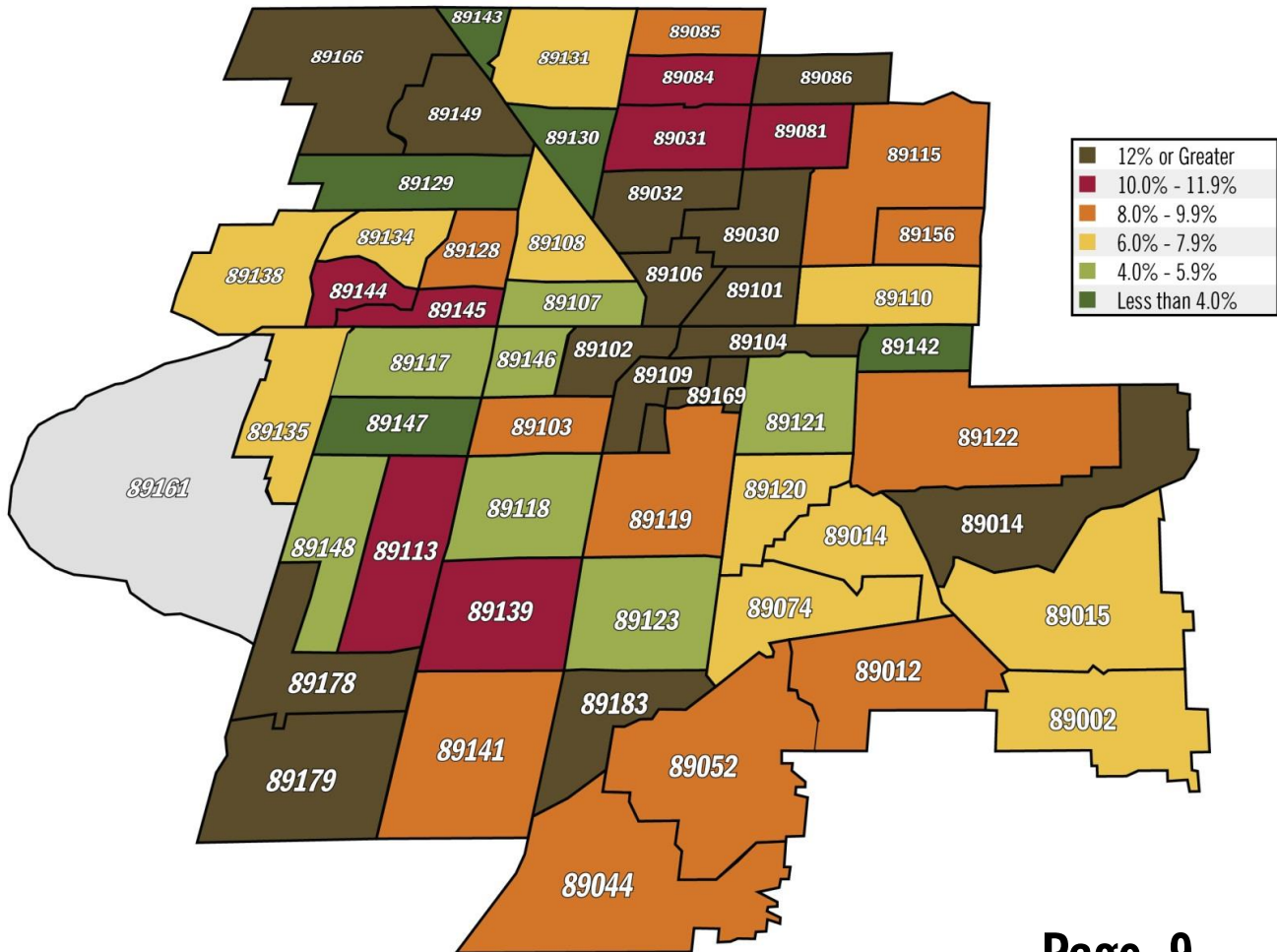
34.7%

Page: 7



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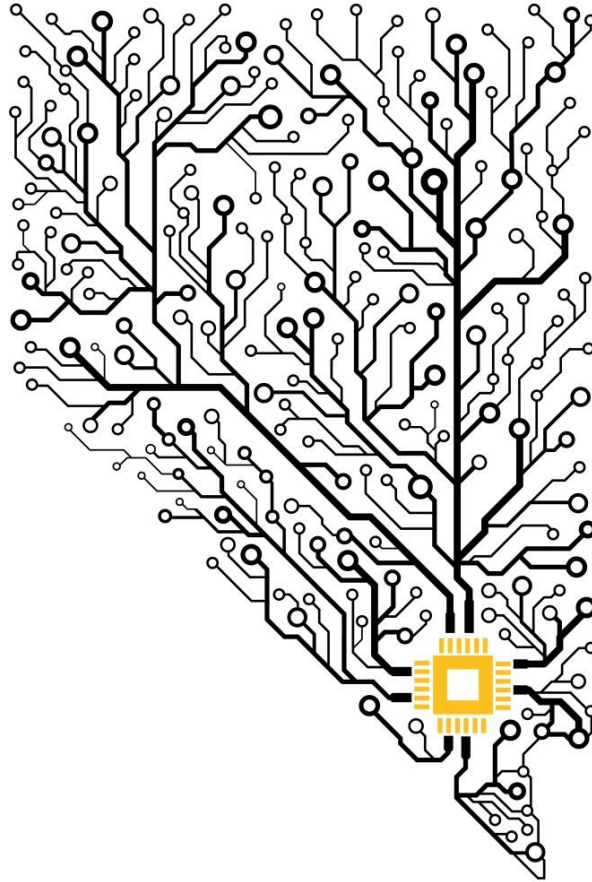
2013
LAS VEGAS
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Community

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98.3

Page: 26



63.0%

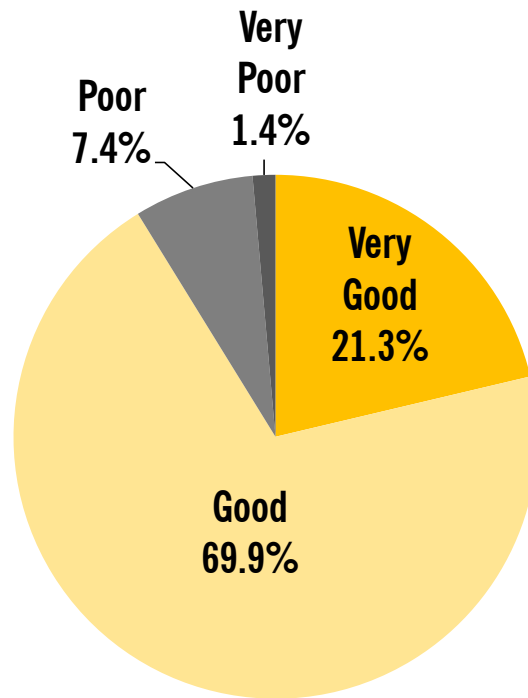
81.2%

79.8%

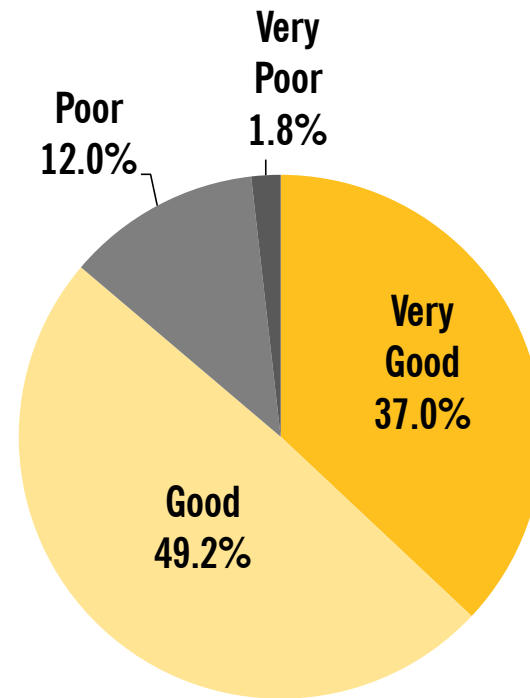


Quality of Life

Overall



My Neighborhood





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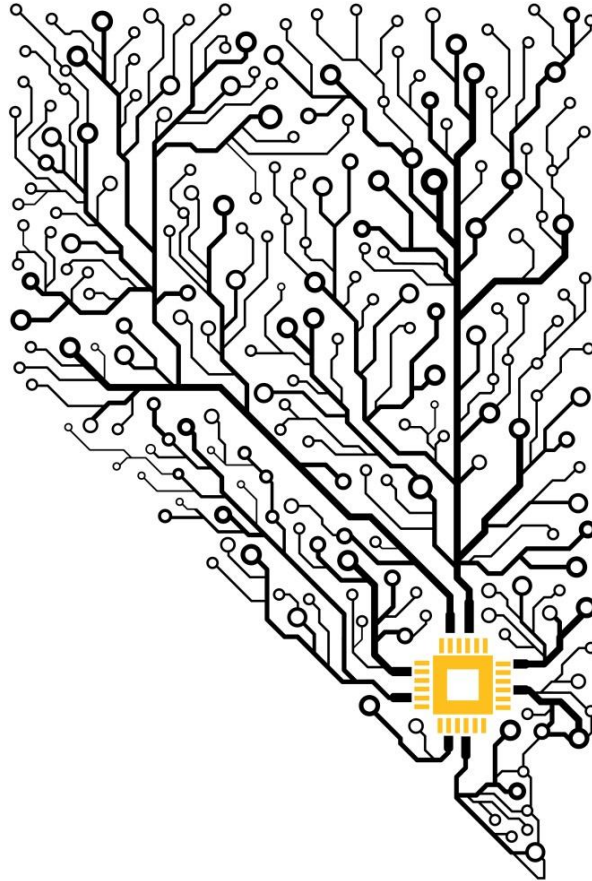
54.9%

Page: 56



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Education

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311,238

27,389

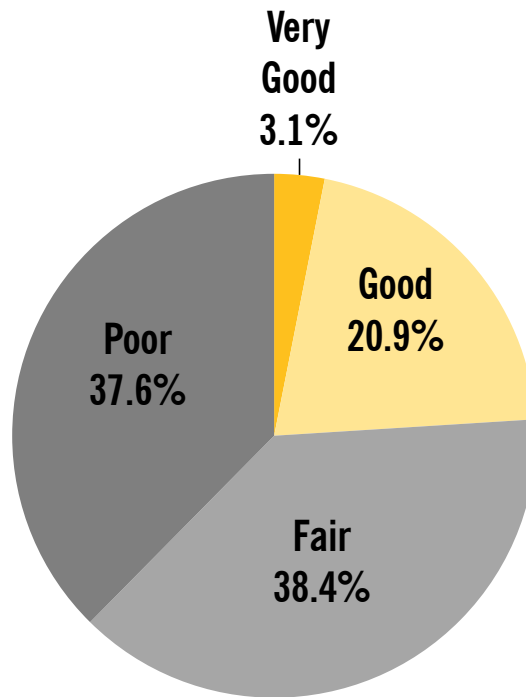
37,696

Pages: 82-88

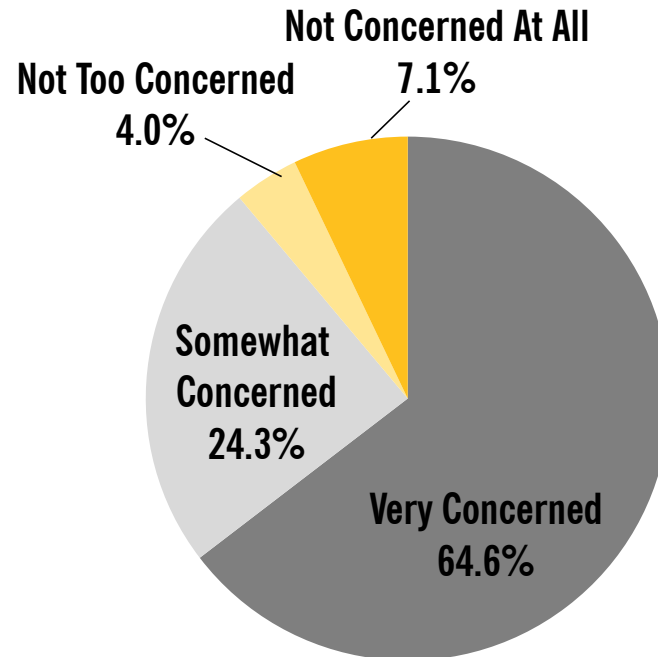


Education

Public Schools



Education Concern

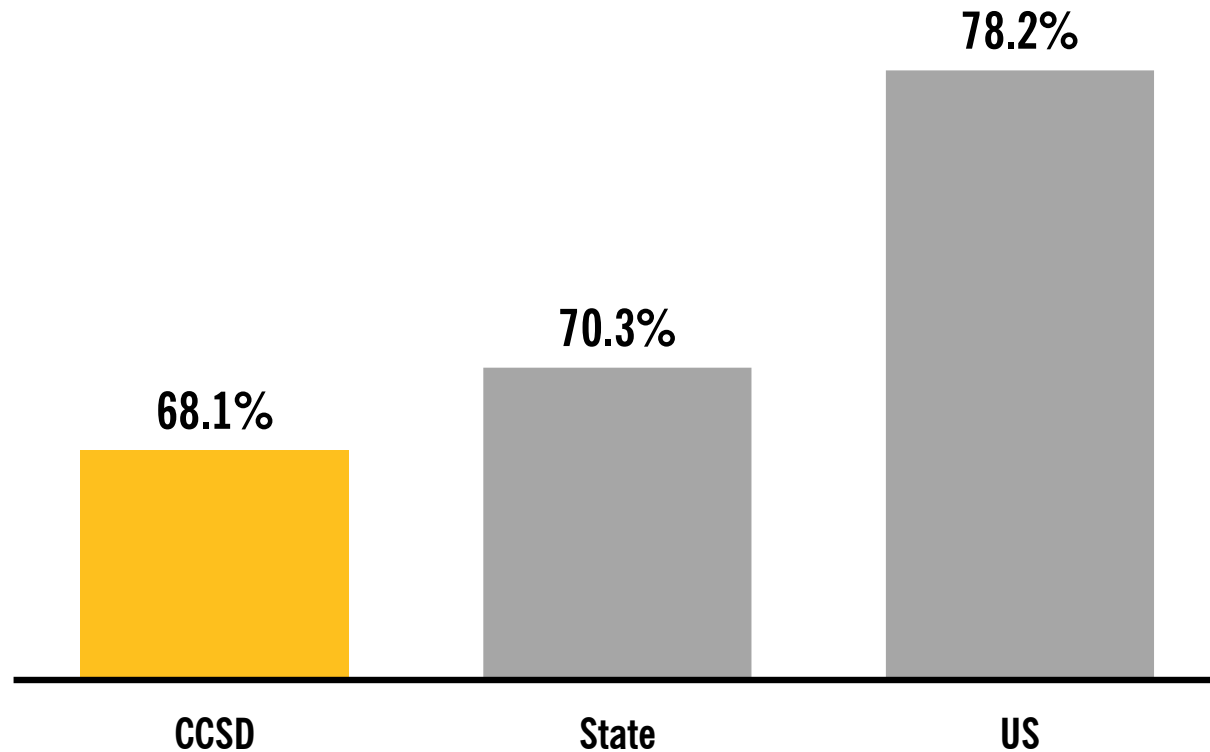




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Graduation Rates



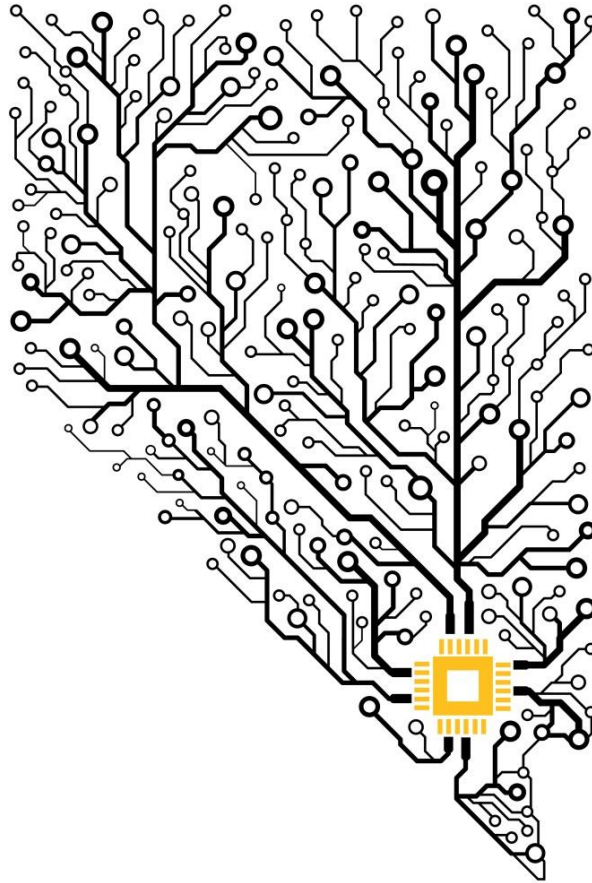
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Health Care

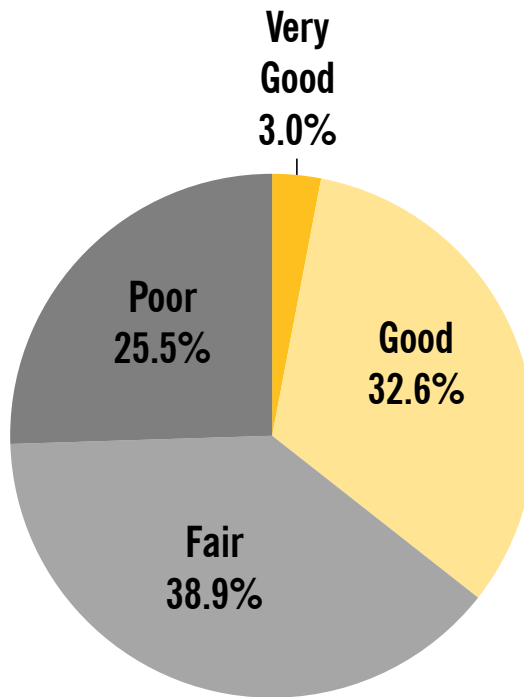
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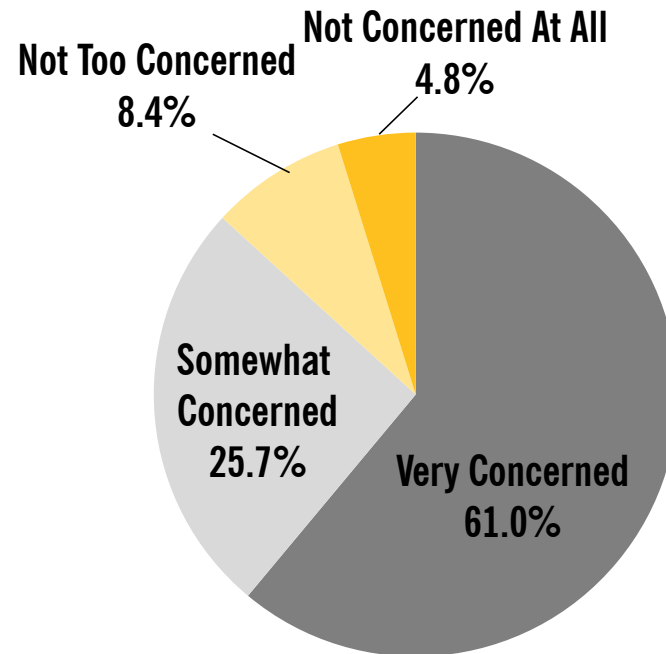


Health Care

Health Care Rating



Health Care Cost Concern





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64.3%

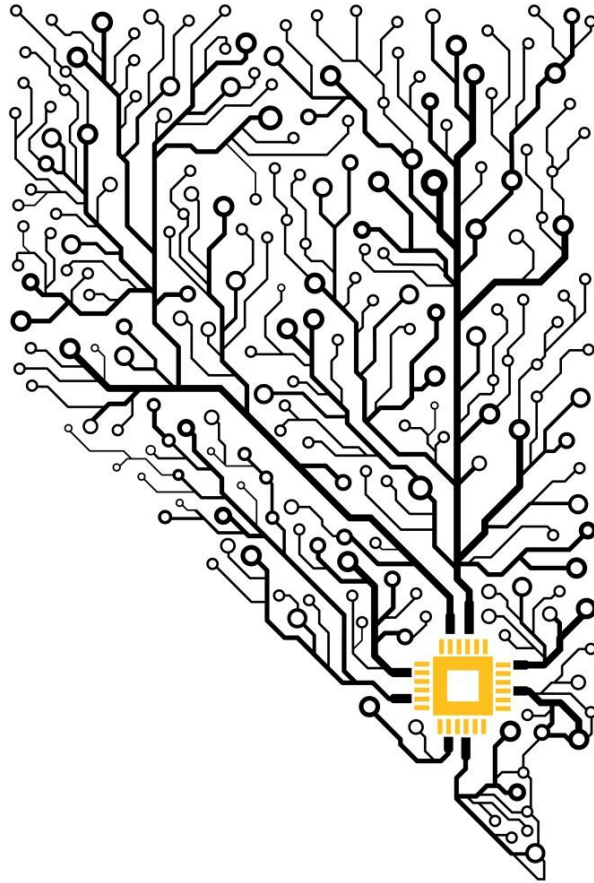
22.0%

Source: Kaiser Family Health Statistics



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28

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TH Foods, Inc.



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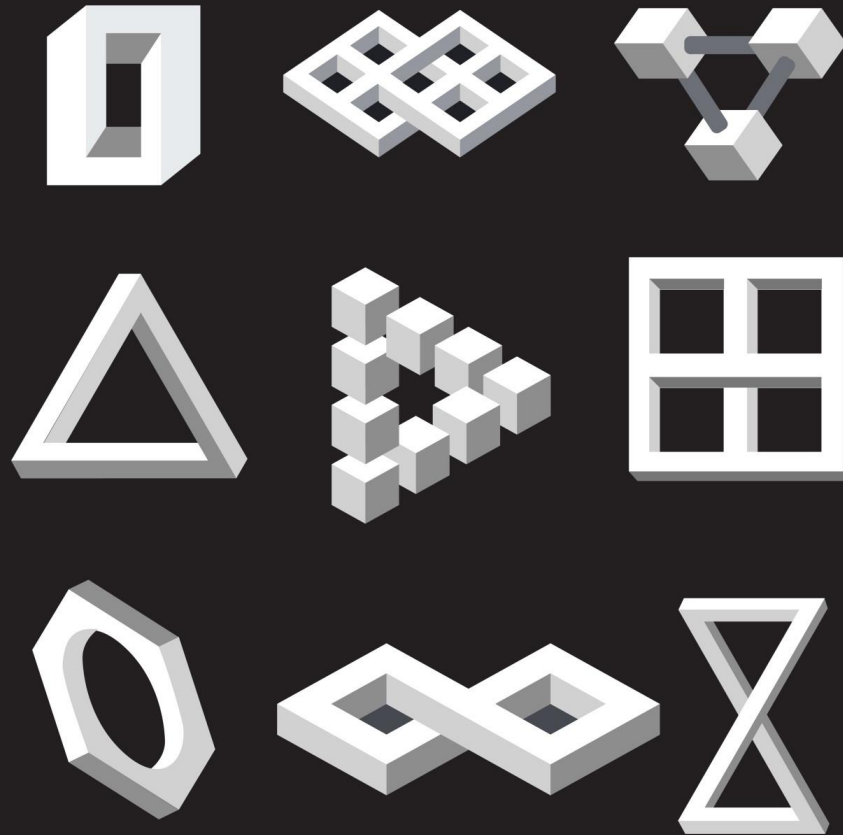
1,379

Page: 106



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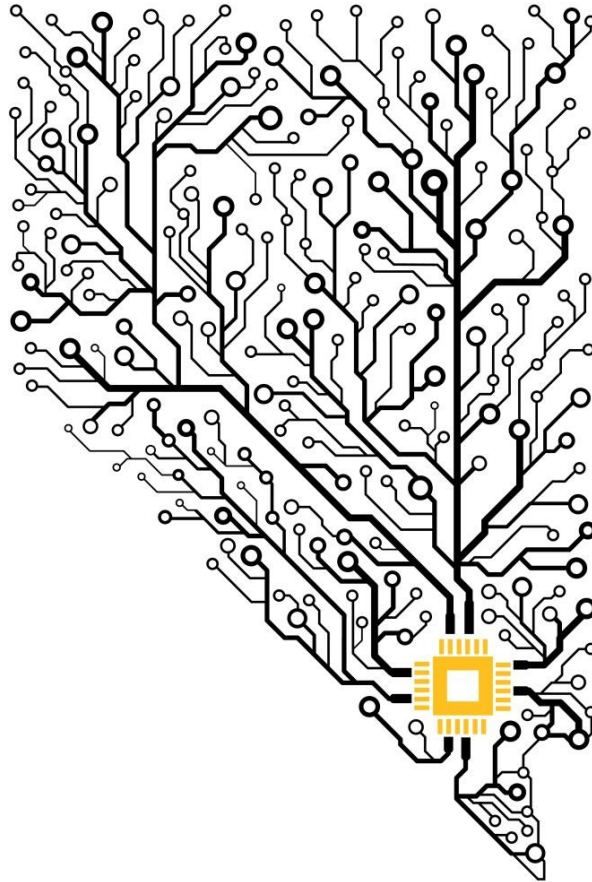


Pages: 105-120



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881,000

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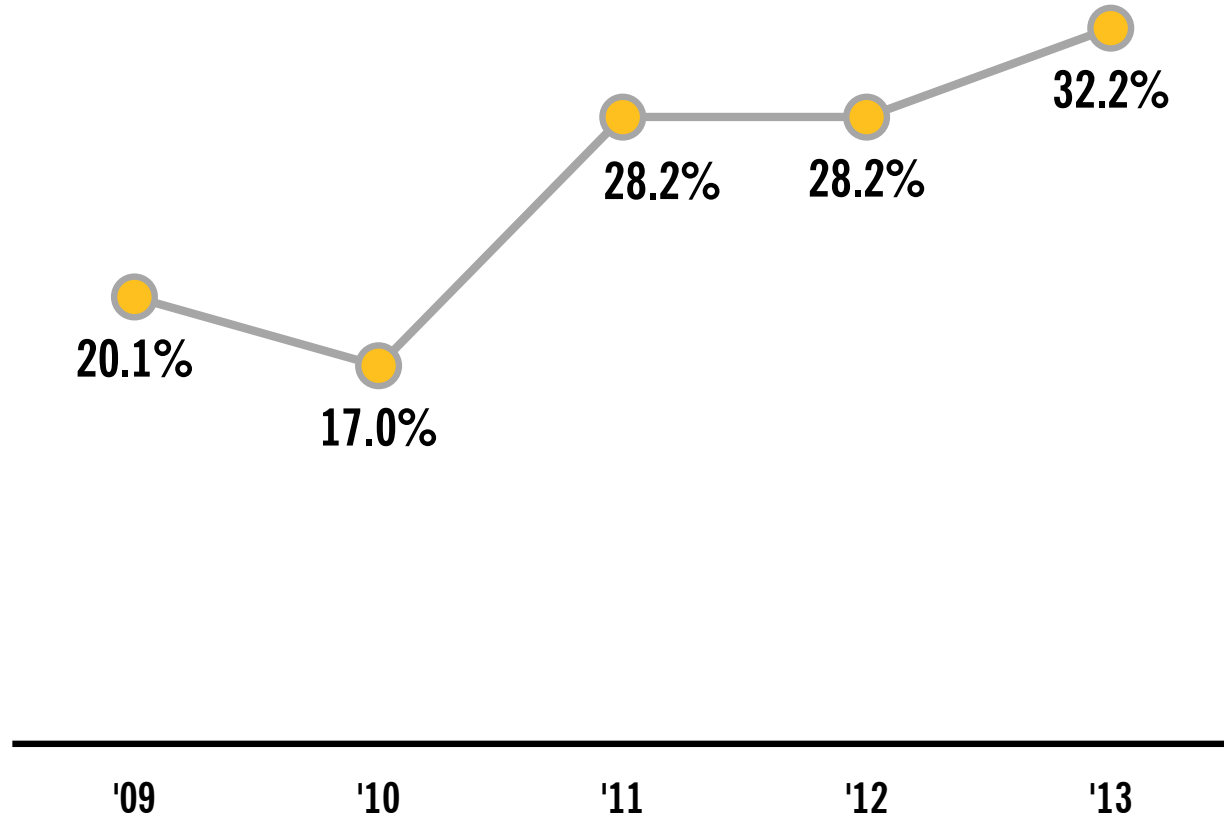
2013
LAS VEGAS
PERSPECTIVE

2.9%

Page: 122

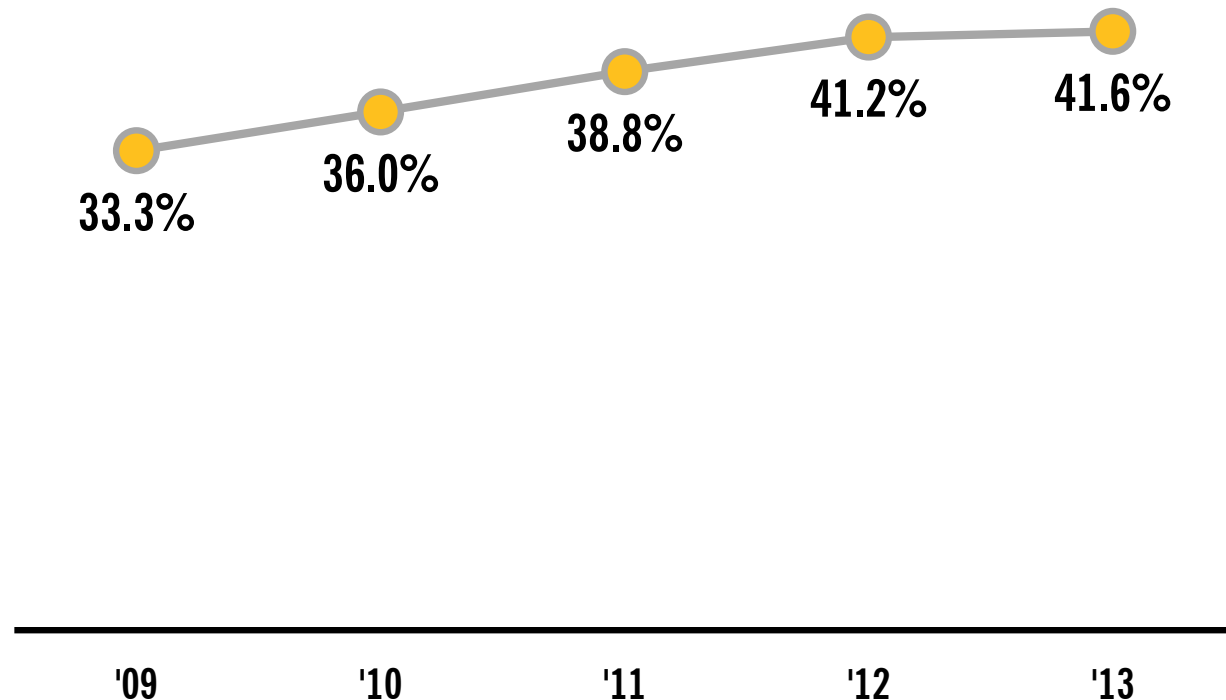


Are You Better Off Today?



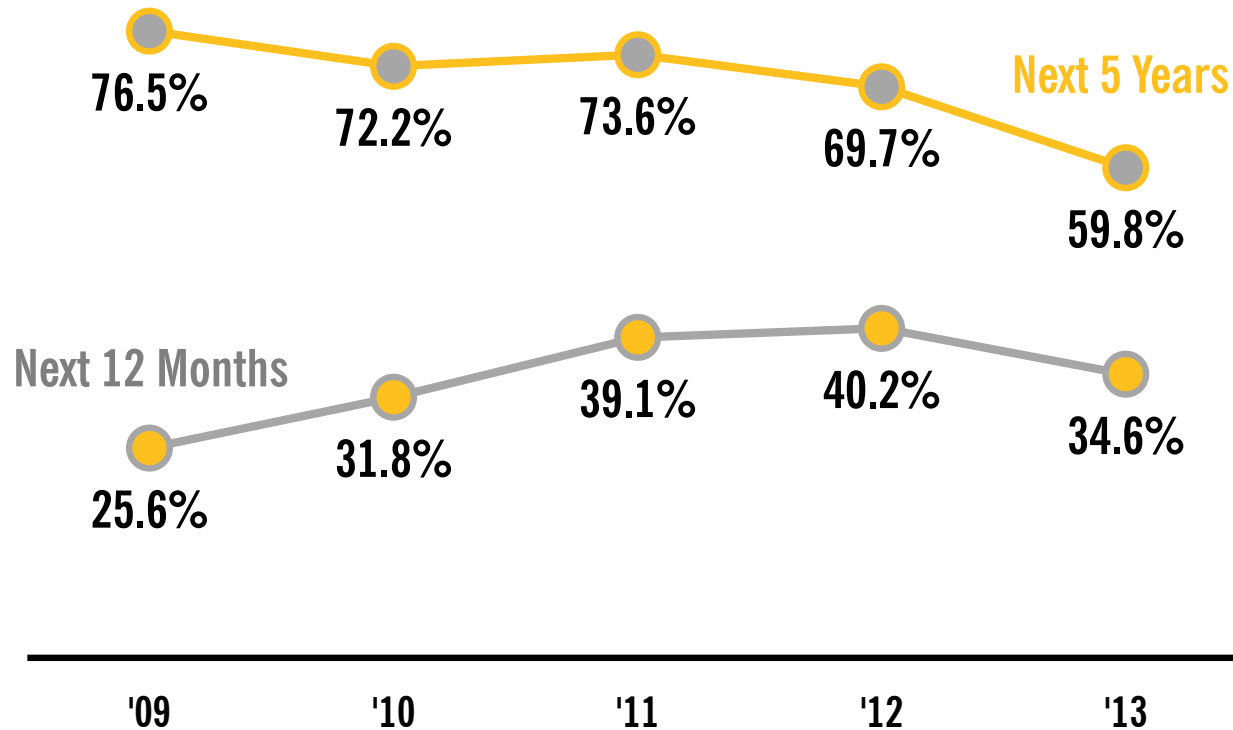


Will You Be Better Off In A Year?



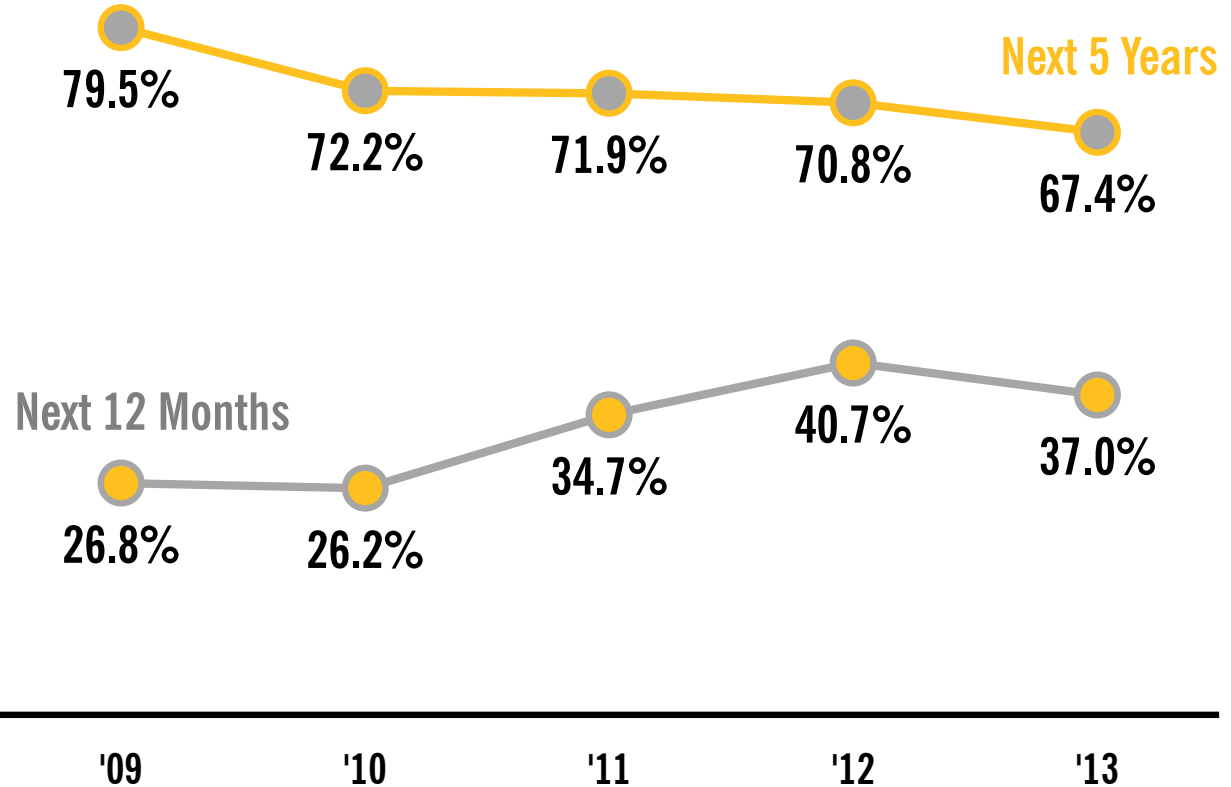


National Economic Expansion





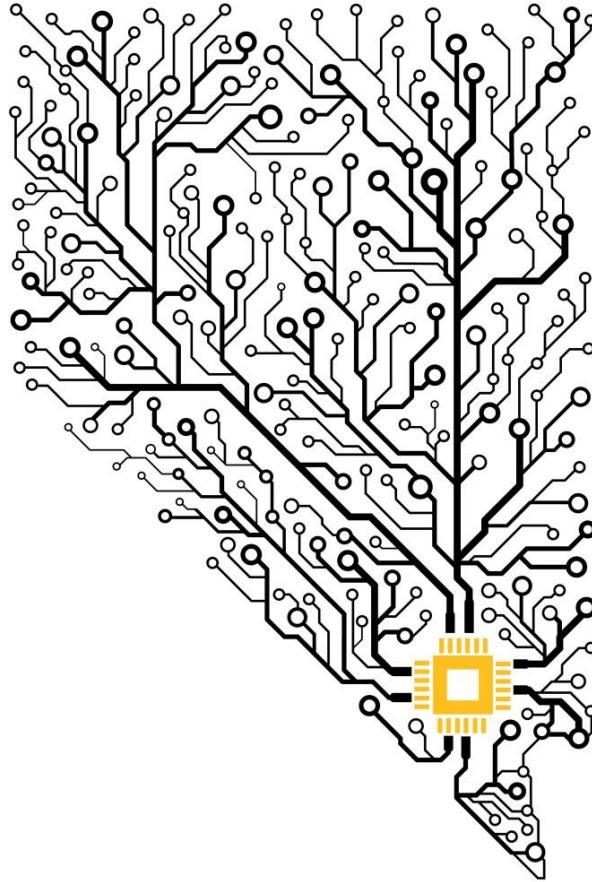
Southern Nevada Economic Expansion





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Real Estate

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52,553

\$130,000

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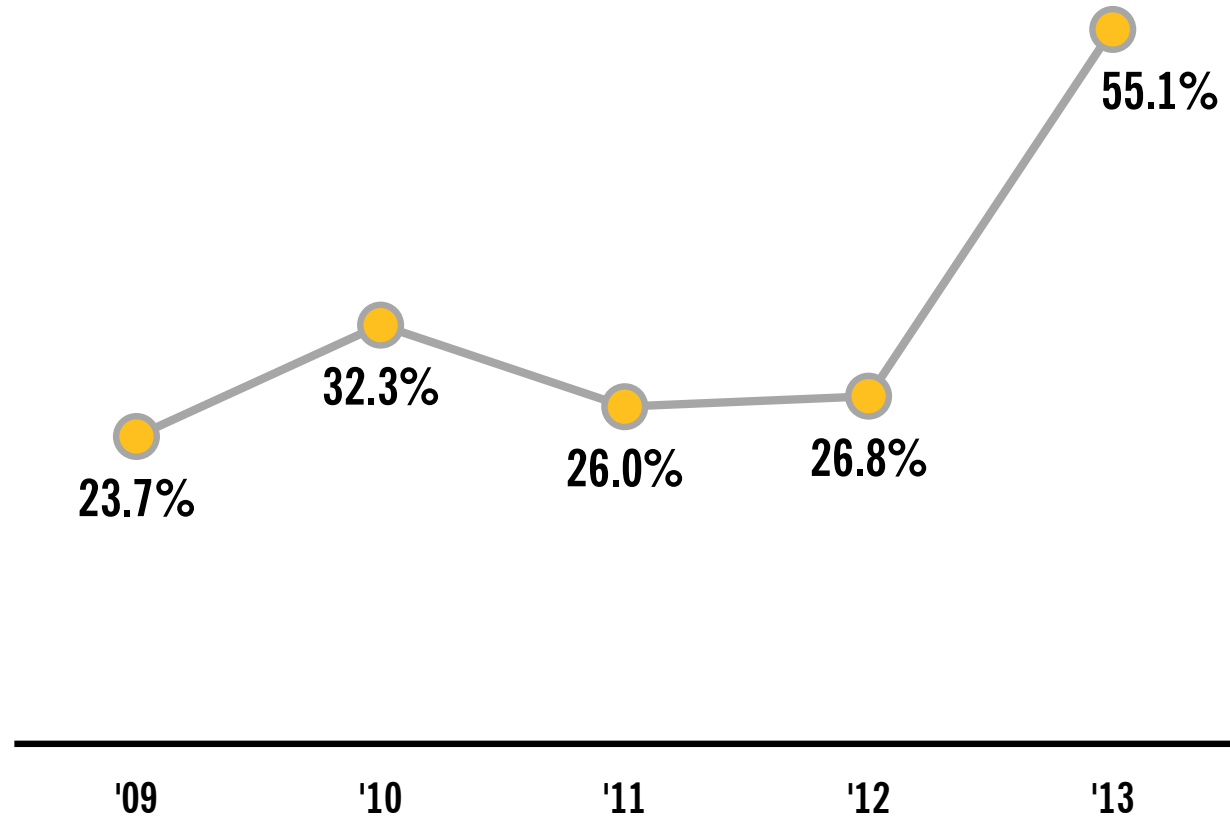
5,389

\$219,963

Page: 136



Will Housing Prices Increase?





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6,225

Page: 142



18.3%

25.3%

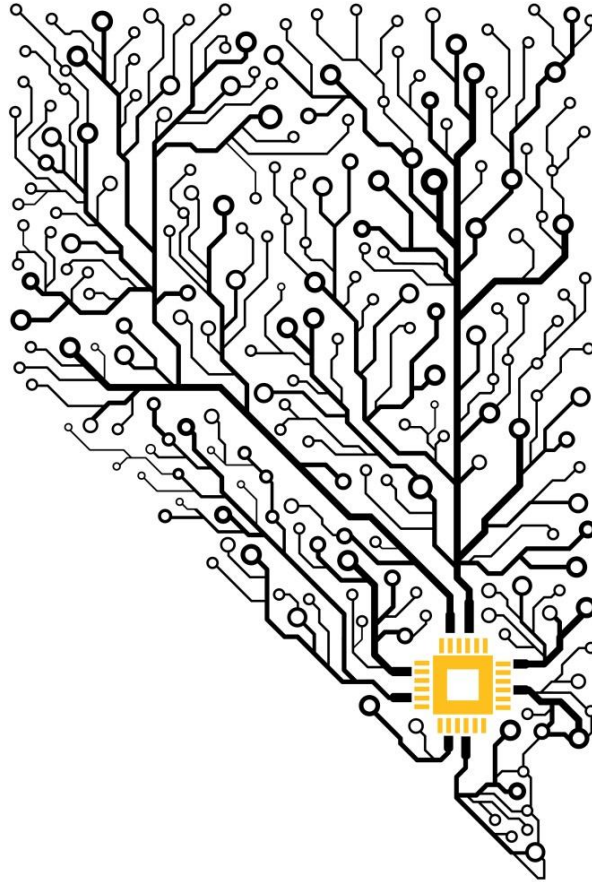
9.9%

Page: 147-148, 159



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Tourism

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39.7M

Page: 164



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\$9.4B

Page: 164



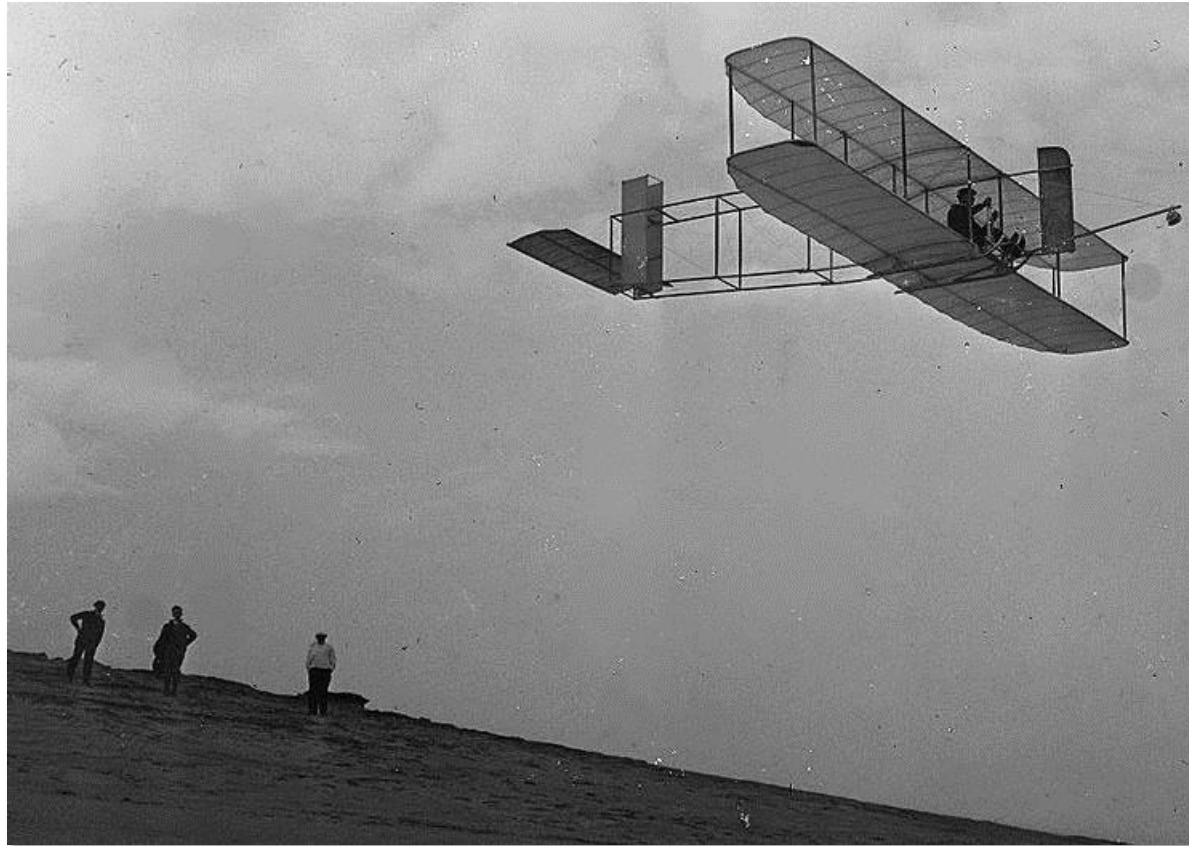
150,481

84.4%



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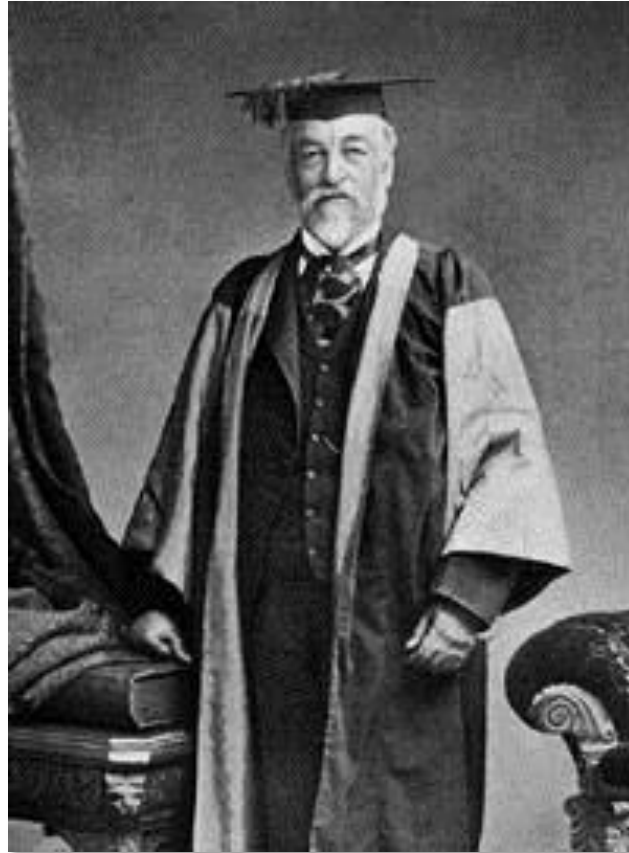
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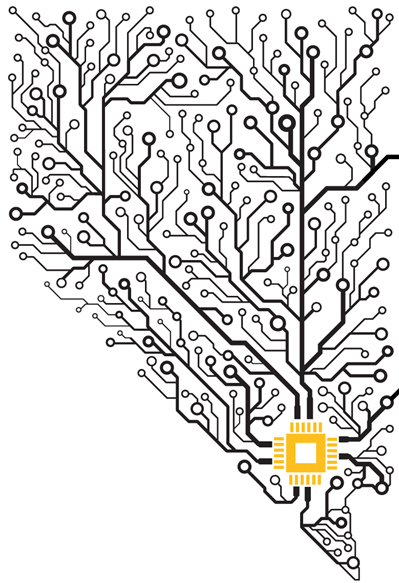
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