



White Space & Market Analysis

📍 Las Vegas, NV

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EducatedAnalytics.com

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Las Vegas Market Overview

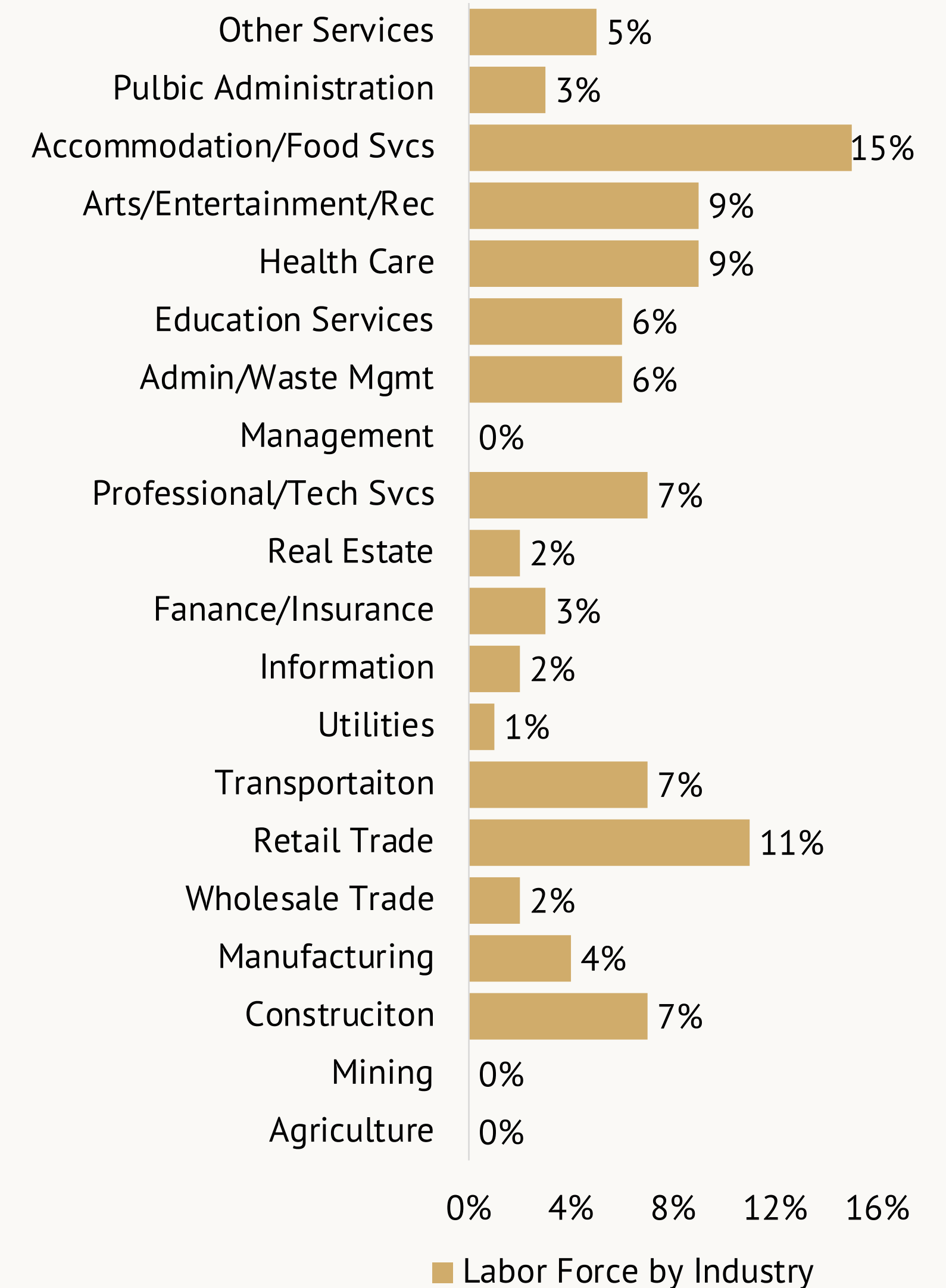
Contact Information

Economy and Infrastructure

Economy Summary

Las Vegas MSA has evolved from a tourism-driven economy into a more diversified market, with expanding sectors in **healthcare, logistics, technology, and film production**. While leisure and hospitality remain key employers, recent corporate relocations, infrastructure investments, and favorable tax policies continue to attract new businesses and support regional economic resilience.

Growth Trends – The Las Vegas MSA continues to experience strong growth, with a **2.1%** population increase in 2024 driven by domestic migration and expanding job opportunities across key sectors. While this growth reinforces long-term demand, it has also intensified challenges around housing affordability and infrastructure capacity.



Economy and Infrastructure



Major Employers

Top Employers: The Las Vegas economy is anchored by major employers such as MGM Resorts International, Las Vegas Sands, and Wynn Resorts.

New Companies: In recent years, Las Vegas has attracted companies like Sierra Space, PwC, and Coz Enterprise, contributing to a 13% growth in the tech sector over five years.

Relocation: The city has seen an influx of businesses and lower operating costs.



Infrastructure & Development

Brightline West High-Speed Rail: Construction began in 2024 on high-speed rail connecting Las Vegas to Southern California, which is expected to be operational by 2028.

New Las Vegas Stadium: The Oakland Athletics are relocating to Las Vegas, with a new \$1.75 billion stadium scheduled for completion by 2028.

Area15 Expansion: The immersive entertainment district is expanding to include new attractions and residential units, enhancing Las Vegas's appeal as a cultural hub.



Major Employers



Public Sector & Education

Clark County School District (CCSD)	~43,000	\$58,420–\$124,654
Clark County Government	10,000	Varies by department
Las Vegas Metropolitan Police Department (LVMPD)	5,000–9,999	Not specified
University of Nevada, Las Vegas (UNLV)	1,000–4,999	Varies by position



Hospitality & Gaming

MGM Resorts International	~63,000	\$13.42–\$31.37/hr \$37,000–\$176,000/yr
Caesars Entertainment	~54,000	\$12.65–\$30.52/hr \$39,387–\$113,656/yr
Wynn Resorts	~30,200	\$12.94–\$48.93/hr \$24,000–\$142,578/yr
Las Vegas Sands Corp.	5,000–9,999	\$17.21–\$19.00/hr \$50,000–\$133,999/yr
Boyd Gaming Corporation	~25,000	\$12.96–\$95.00/hr \$25,000–\$103,945/yr



Healthcare & Services

Valley Health System	~9,000	\$13.26–\$59.65/hr \$43,000–\$81,311/yr
University Medical Center (UMC)	Not specified	\$20.36–\$80.61/hr \$64,342–\$383,065/yr



Logistics & Transportation

Southwest Airlines	Not specified	\$15.64–\$30.75/hr \$44,392–\$270,815/yr
Allegiant Air	~4,000	\$13.96–\$40.51/hr \$47,847–\$137,301/yr
UPS	Not specified	\$13.00–\$27.84/hr \$474–\$1,399/wk.



Finance & Retail

Wells Fargo	Not specified	\$20.00/hr \$88,452/yr
Amazon	Not specified	\$14.52–\$92.50/hr \$28,000–\$154,513/yr

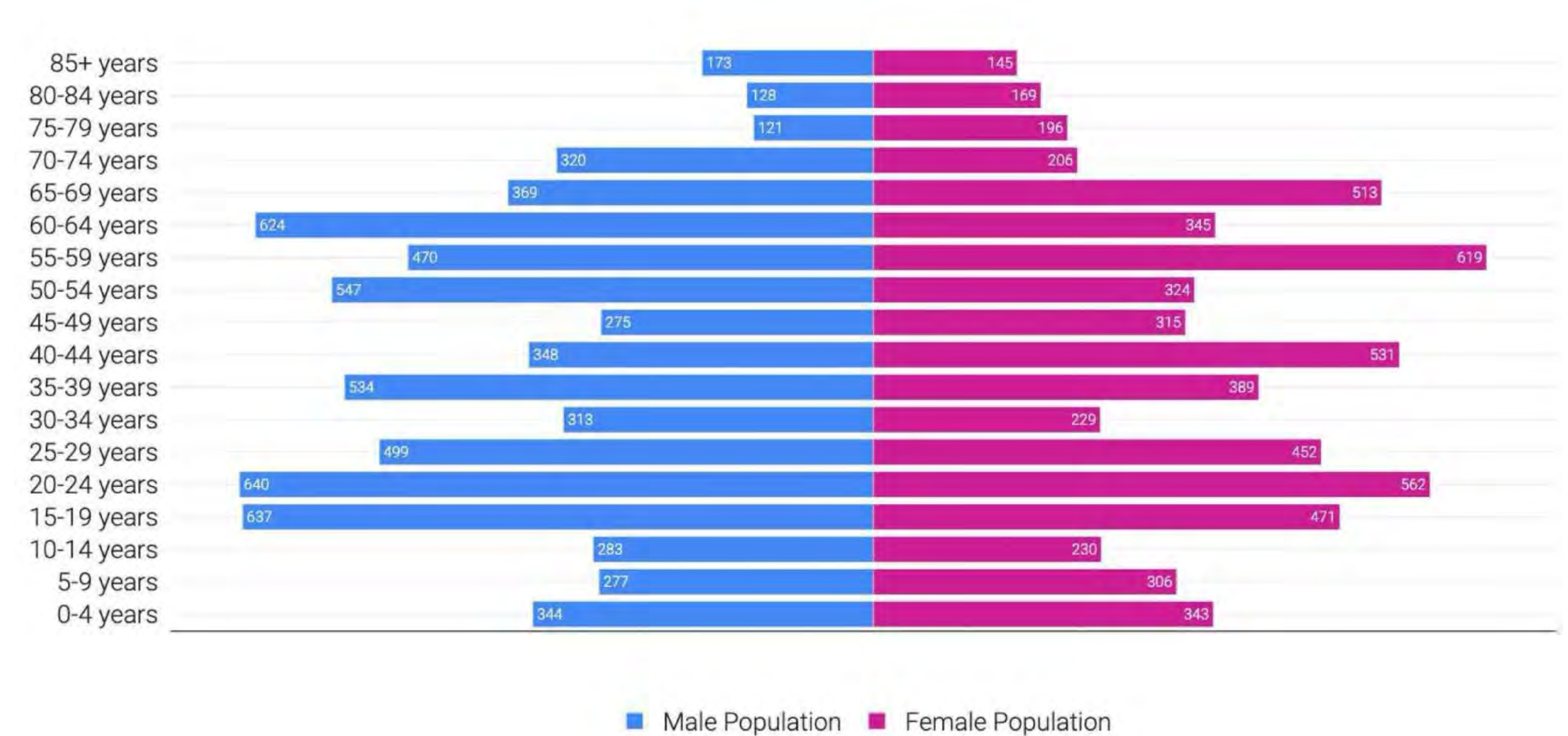
Demographics

MSA Metrics

	Median Income	\$76,033
	Average HH Income	\$103,246
	Avg Disposable Income	\$80,205
	Total Population	2,387,864
	Median Age	38.6
	Total Households	898,700
	Average Household Size	2.64
	Unemployment Rate	5.6%

Las Vegas, NM population pyramid

A wide base suggests population increase, narrow base indicates declining birth rates.



Source: U.S. Census Bureau, American Community Survey (ACS) 2017-2021 5-Year Estimates

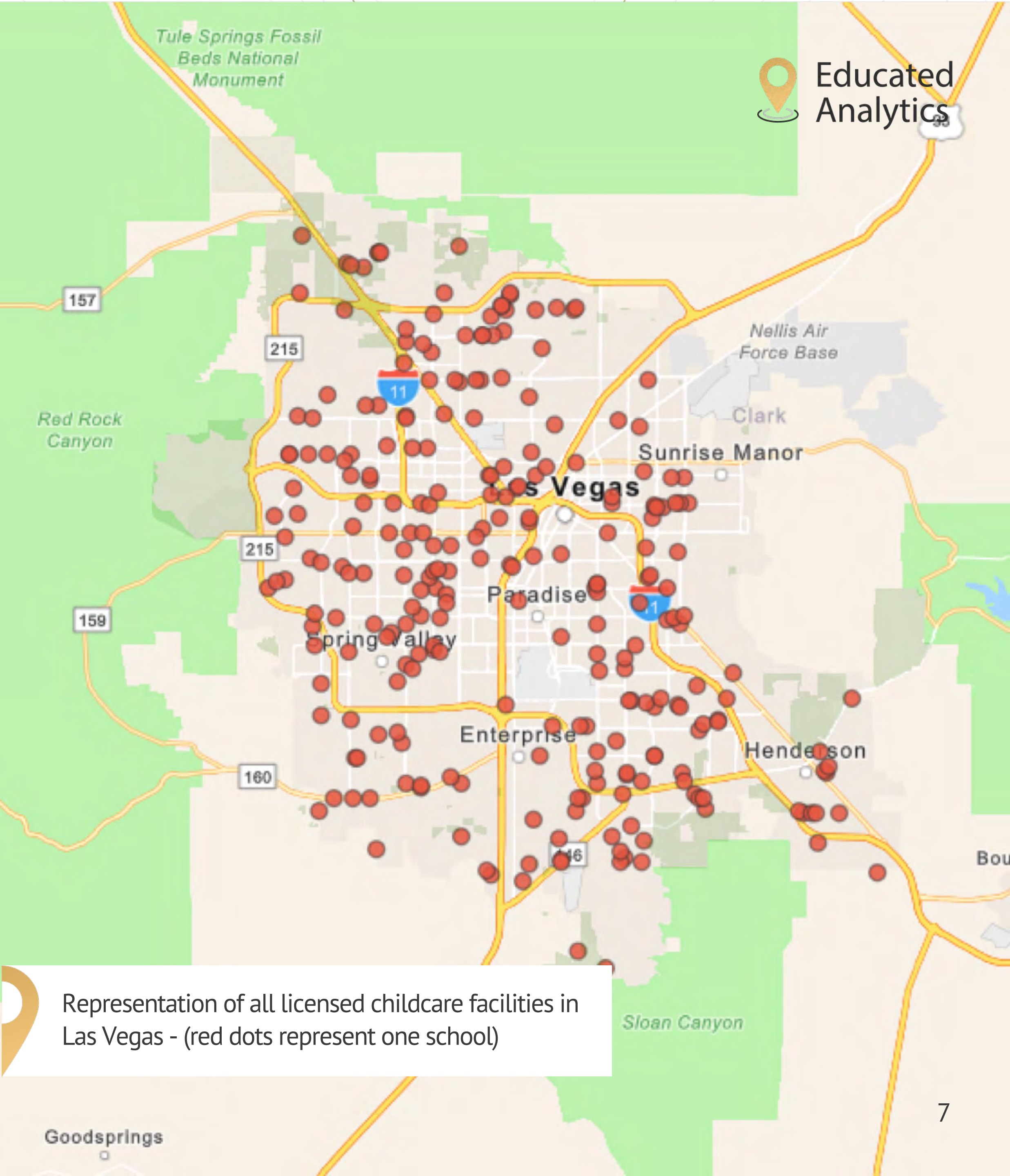
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Early Childhood Education

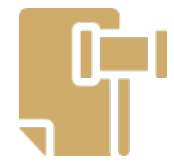
The early childhood education market in the Las Vegas MSA is supported by a growing and diversifying economy, driven by population influx and continued investment across key industries.

As the metro expands to the northwest, demand for early education services is rising, particularly in fast-growing areas like Southwest Las Vegas, Henderson, and North Las Vegas. While the market faces challenges related to affordability and limited provider capacity, these same gaps present meaningful opportunities for strategic expansion in underserved submarkets.

Market Size	
Preschools	248
LC > 50	214
LC > 100	165
LC > 150	101
Number of LC Seats	32,799
Supply & Demand	5.42x
Total Population	2,387,864
Number of Children 0-6	190,730
Number of Children 0-4	135,039
Number of Children 5-9	140,702



Policy & Grants



Nevada Preschool Regulatory Overview ([Preschool Teacher in NV](#))

- Child-to-Teacher Ratio: Maximum of 10:1 in preschool classrooms to ensure individualized attention and support.
- Health & Safety Standards: Classrooms must meet strict sanitation, safety, and supervision requirements; regular inspections are conducted.
- Licensing Requirements: Teachers must hold at least an Associate's degree in Early Childhood Education or a related field.
- Curriculum Guidelines: Programs must align with the Nevada Pre-Kindergarten Standards, focusing on cognitive, social, and emotional development.
- State Assessments: Preschools are required to assess and report student progress to inform instruction and meet accountability standards.



Childcare Grants and Financial Assistance

Available grants include:

- Start-Up Grants: Assist new family child care homes, group family child care homes, and centers with initial costs such as fees and classroom materials.
- Emergency Grants: Support providers in addressing licensing violations.
- CDA Training Support: Financial assistance for obtaining or renewing the Child Development Associate (CDA) credential.
- T.E.A.C.H. Early Childhood® Nevada: Offers scholarships for early childhood educators pursuing higher education.
([Children's Cabinet](#), <https://www.fox5vegas.com>)

Policy & Grants



Child Care Subsidy Programs Changes

As of October 1, 2024 the Nevada Division of Welfare and Supportive Services (DWSS) implemented new eligibility.

- New Applicants: Eligible if household income is at or below 41% of the State Median Income (SMI). For a family of four, this equates to an annual income of up to \$39,371.
- Renewal Applicants: Continue to be eligible if household income is at or below 49% of SMI, which is up to \$47,053 for a family of four.
- Monthly Family Copayment: Transitioned to a flat-rate system with amounts set at \$0, \$90, or \$150 per month, depending on household size and income (first5nevada.org) (<https://dwss.nv.gov/Childcare>).



Federal and State Funding

Nevada received a \$30 million Preschool Development Grant Birth through Five (PDG B-5) Renewal Grant, allocated at \$10 million per year from 2023 to 2025. This funding aims to strengthen the state's early childhood system through collaborative partnerships (<https://doe.nv.gov/offices/oeld/pdg-renewal-grant>).

Competition & Tuition



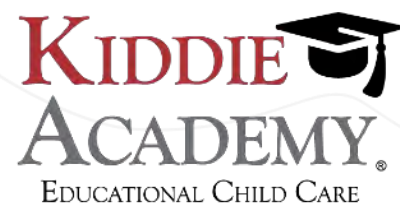
The Learning Experience

4 schools with an average tuition rate of \$1,600 for preschoolers & \$1271 for infants.



Primrose

5 schools with an average tuition rate of \$1,612 for preschoolers & \$1847 for infants.



Kiddie Academy

4 schools with an average tuition rate of \$1,688 for preschoolers & \$1516 for infants.



Goddard School

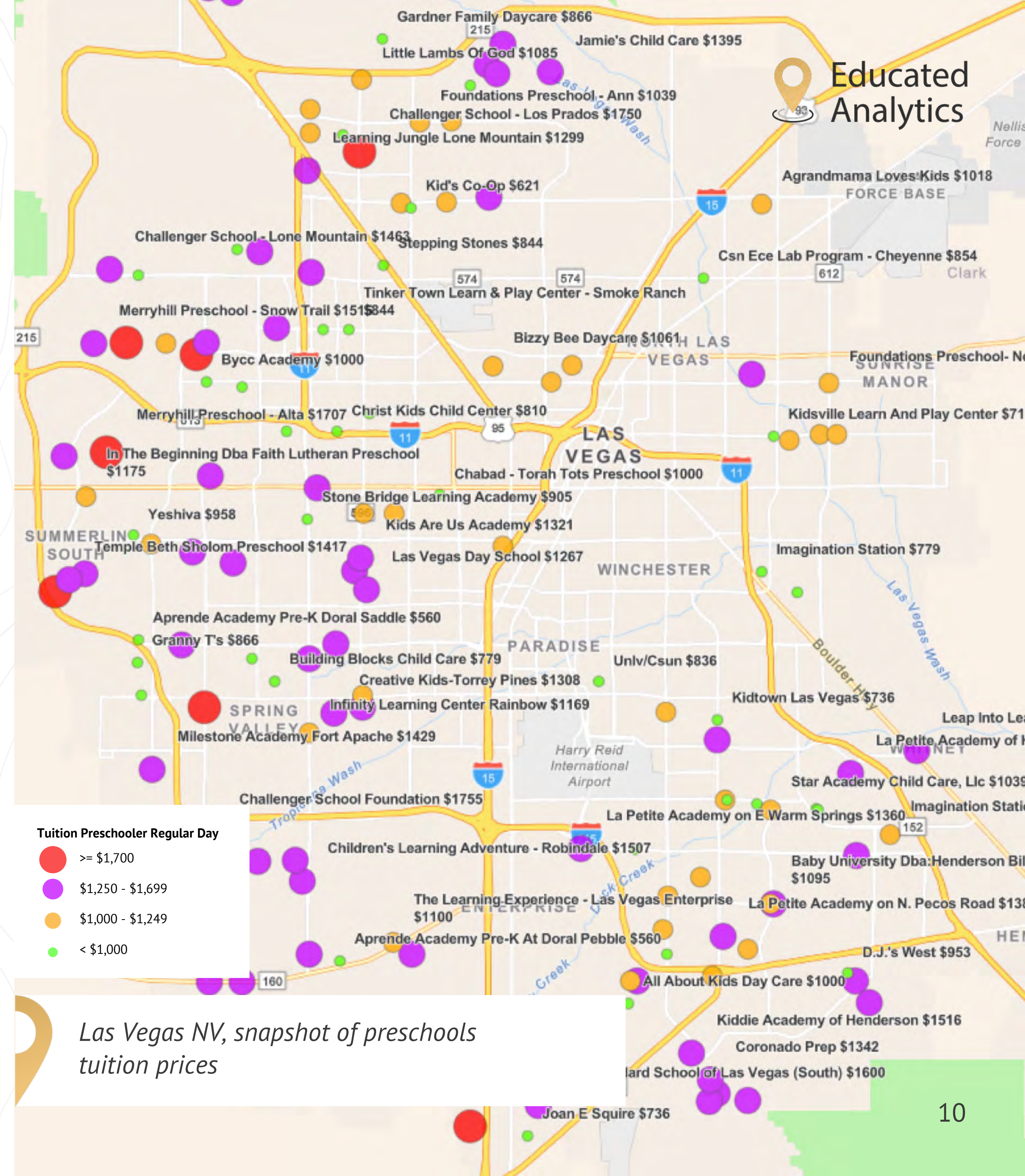
5 schools with an average tuition rate of \$1,546 for preschoolers & \$1845 for infants.



KinderCare

13 schools with an average tuition rate of \$1,694 for preschoolers & \$1401 for infants.

[Las Vegas Data Set Link](#)

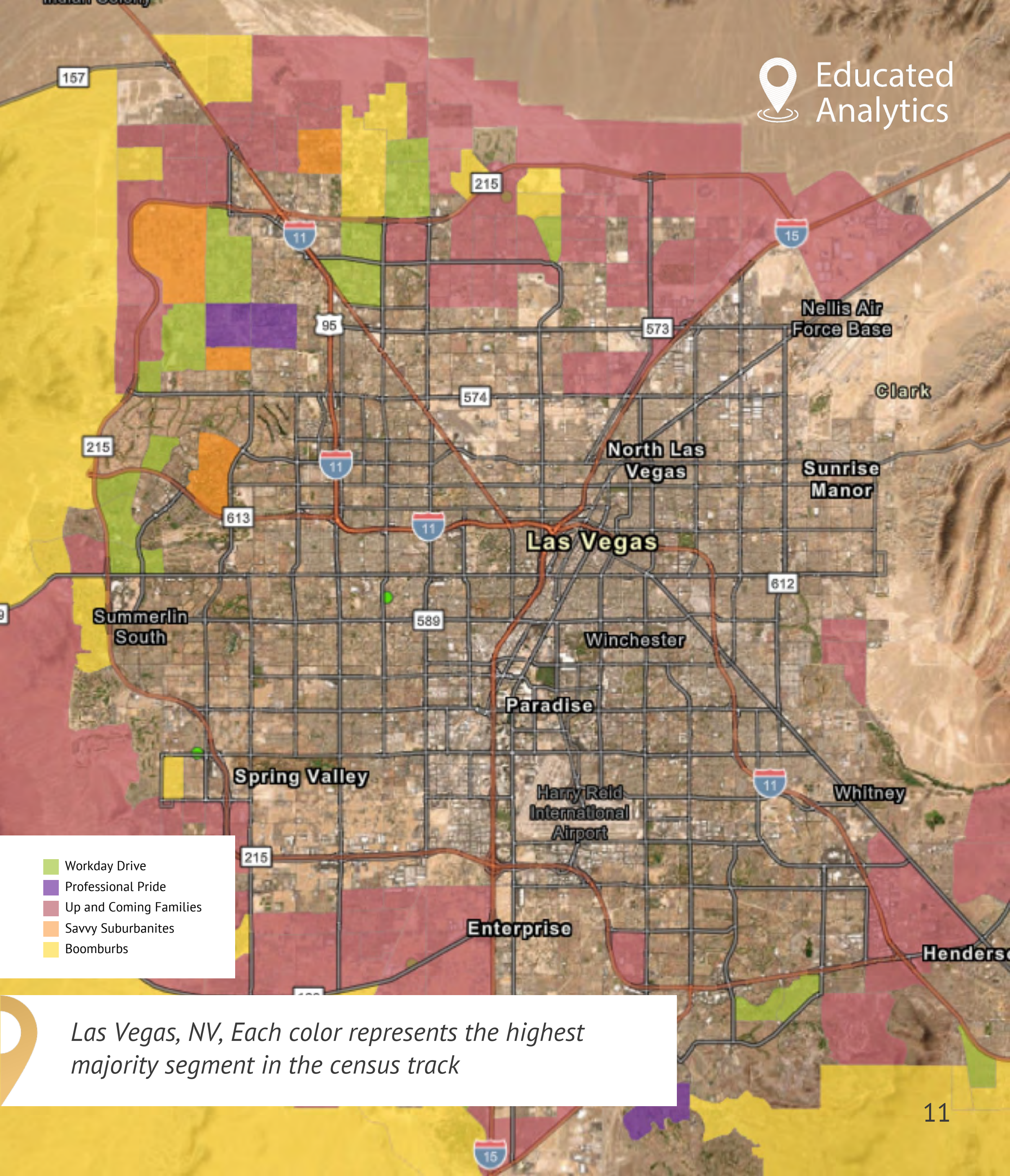


Locating Customer Profile w/ Tapestry Segments

Tapestry Demographics

To guide the operators understanding and expansion strategy in the Las Vegas MSA, we selected Esri Tapestry Segments that closely align with their core customer base—**Workday Drive, Professional Pride, Up and Coming Families, Savvy Suburbanites, and Boomburbs**. These segments represent dual-income households, career-focused parents, and upwardly mobile families seeking high-quality early education options. Each group is characterized by suburban living, strong labor force participation, and discretionary income—key indicators of demand for center-based childcare. By mapping where these segments are most concentrated across Las Vegas, we can identify high-opportunity neighborhoods where families both **live and commute**, allowing The Learning Care Group to prioritize locations with the strongest alignment to their customer profile and service model.

Tapestry Segments	Workday Drive	Professional Pride	Up and Coming	Savvy Suburbanites	Boomburbs
Median Age	37.0	40	31	45	34
Median HH income	\$90,500	\$138,000	\$72,000	\$108,700	\$113,400
Average House Size	2.97	3.13	3.21	2.85	3.25
Population Density per sq. mile	523	974	966	346	1,017
Home-Ownership	84.9%	91.6%	73.9	90.6%	84.0%

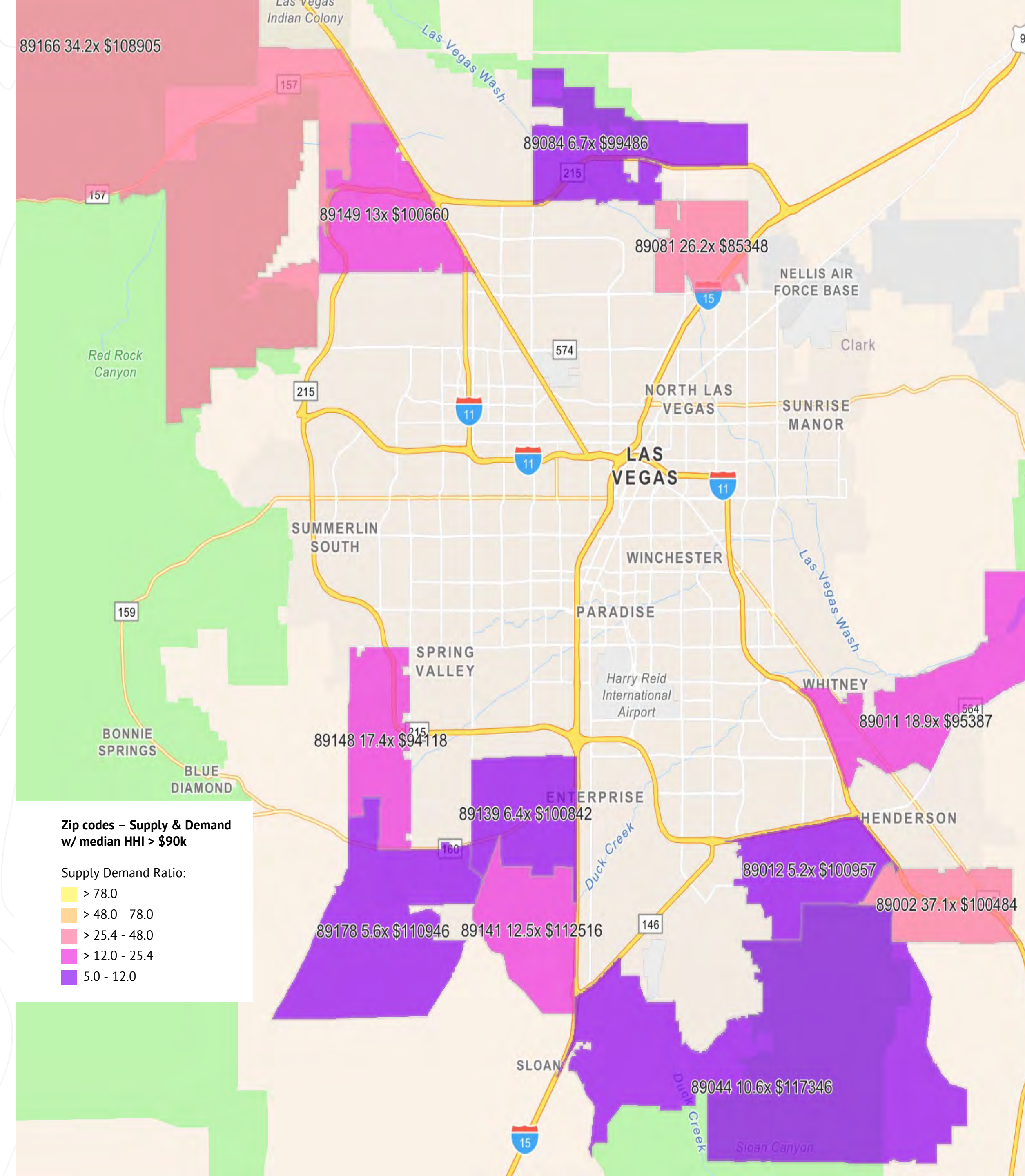


EDA ANALYSIS

Highest Demand By Zip Codes (Median HHI >\$90k)

Educated Analytics tracks the ratio of children ages 0–6 to licensed capacity within each ZIP code to uncover true demand. This analysis highlights only ZIP codes with a median household income above \$90,000 and a supply-to-demand ratio greater than 5:1 – indicating significant unmet need in affluent areas.

- Only ZIP codes with a **5x+ demand multiple** and **\$90K+ median income** are mapped
- A high ratio signals an **overwhelmed local supply** and an **opportunity to fill the gap**
- Operators can target families with **greater disposable income and demand for quality care**
- Ideal for **new center development, capacity expansions, or tuition optimization** strategies



New Residential & Elementary Growth Areas

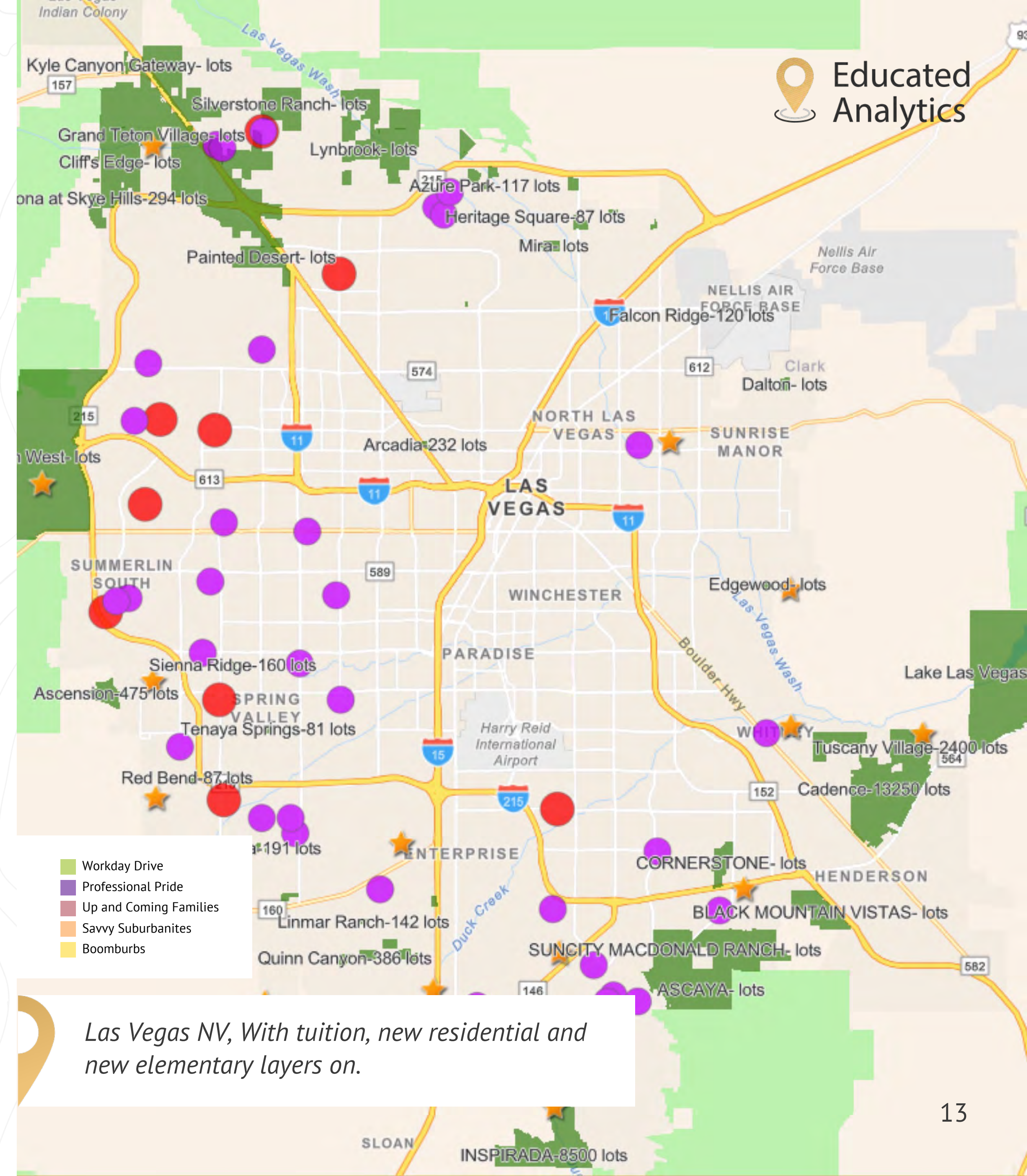
Lead-In: Pinpointing High-Growth Opportunity Zones

Before finalizing our white space strategy, we deepen our analysis by layering **high-quality, market-proven data** to reveal where family-driven growth is taking place.

Building on our tapestry segmentation, we integrate:

- **New Residential Developments** – signaling where families are actively moving and buying homes
- **Planned Elementary Schools** – strong indicators of long-term community and infrastructure investment
- **Top-Performing Childcare Centers** – helping us benchmark existing quality and identify supply gaps

This layered intelligence gives us a precise view of both current demand and future momentum, ensuring we recommend expansion areas where the customer profile, growth, and service gaps align.



White Space Analysis for Las Vegas

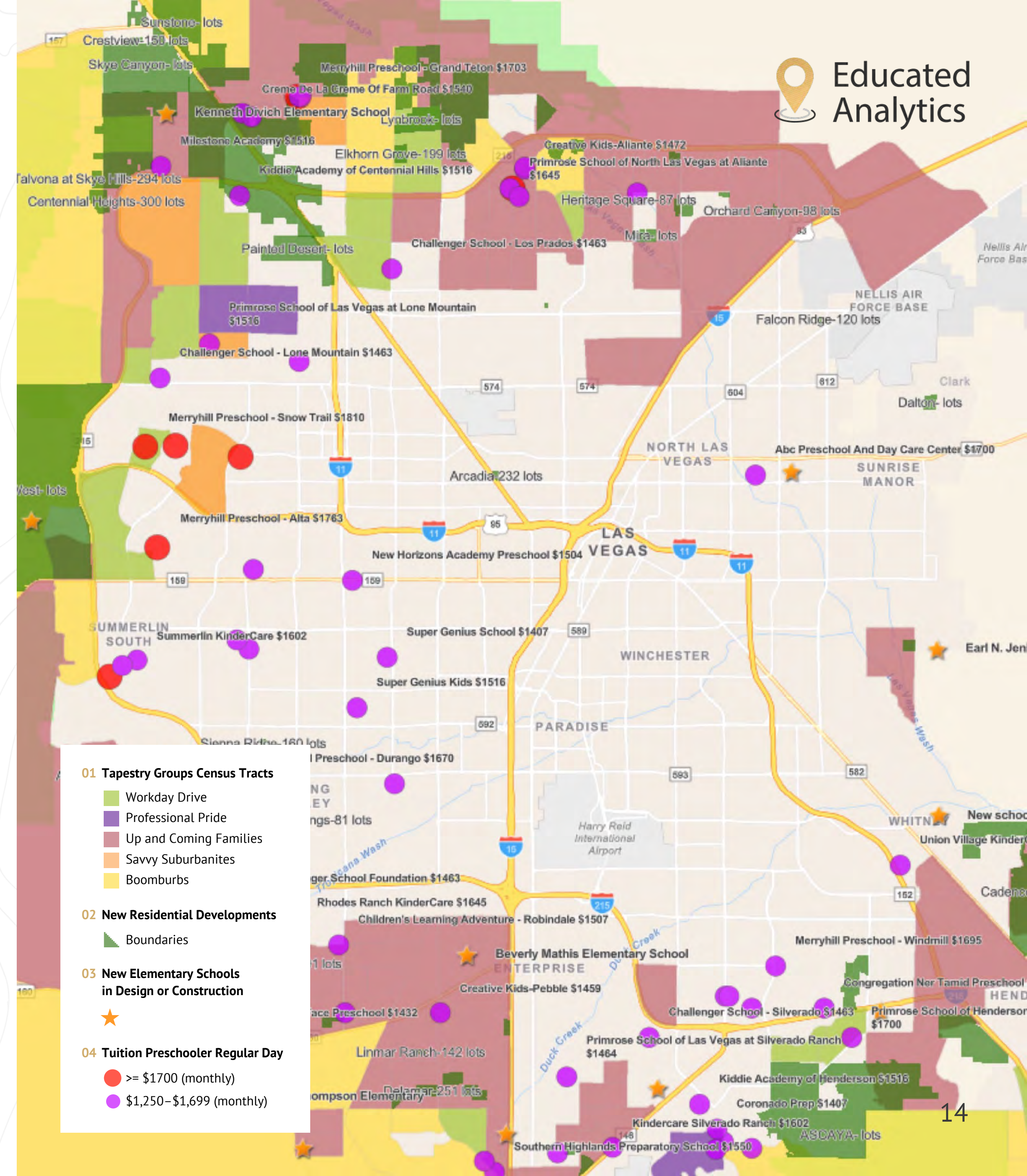
White Space Strategy: Where All Data Comes Together

Bringing all data layers together allows us to move beyond intuition and into precision. Each layer—on its own—is valuable, but when combined, they reveal clear, investable white space.

We align:

- **Target Tapestry Segments** – to find where ideal families live and work
- **New Residential Developments** – to identify where growth is accelerating
- **Planned Elementary Schools** – to highlight future hubs of family activity
- **Top-Performing Childcare Centers** – to benchmark supply and expose unmet demand

Together, these insights form a powerful framework for identifying high-potential, underserved areas. This strategic approach helps prioritize markets with the strongest alignment between customer need and growth opportunity, driving smarter, more successful expansion.



Defining Submarkets

Market Opportunities: Recommended Submarkets for Growth

After integrating all data layers—demographics, development activity, school investment, and childcare supply—we've identified the highest-potential submarkets for expansion.

On the map to the right, we highlight three strategic areas:

- **Skye Canyon & Providence** – strong growth and underserved by high-quality care
- **Summerlin West & South** – affluent, family-oriented, and rapidly expanding
- **Seven Hills & Anthem (Henderson)** – established communities with sustained demand and limited premium supply

These areas offer the strongest alignment of customer profile, growth trajectory, and unmet demand—positioning for successful, data-backed expansion.



Submarket Metrics

SUBMARKET 1 Sky Cannon & Providence

Median HH Income	\$103,331
Avg Supply & Demand	7.31x
Avg Preschooler Rate	\$1,241
Avg Infant Rate	\$1,443
% on Waitlist	~28%
Children 0-4	9,876
Children 5-9	10,829
# of Licensed Capacity Seats	1,928
Growth %	0.9%

SUBMARKET 2 Summerlin West & South

Median HH Income	\$155,723
Avg Supply & Demand	4.39x
Avg Preschooler Rate	\$1,502
Avg Infant Rate	\$1,802
% on Waitlist	~50%
Children 0-4	3,632
Children 5-9	4,472
# of Licensed Capacity Seats	1,225
Growth %	0.7%

SUBMARKET 3 Seven Hills & Anthem

Median HH Income	\$93,370
Avg Supply & Demand	3.97x
Avg Preschooler Rate	\$1,446
Avg Infant Rate	\$1,284
% on Waitlist	~55%
Children 0-4	10,558
Children 5-9	11,610
# of Licensed Capacity Seats	4,026
Growth %	0.8%

Sky Cannon & Providence

Skye Canyon / Providence – Northwest Las Vegas

 Market Snapshot

Median Home Price	Year-over-Year Growth	Median Household Income	Median Age
\$807,500	+6.6%	\$157,000	44.3

Family Demographics

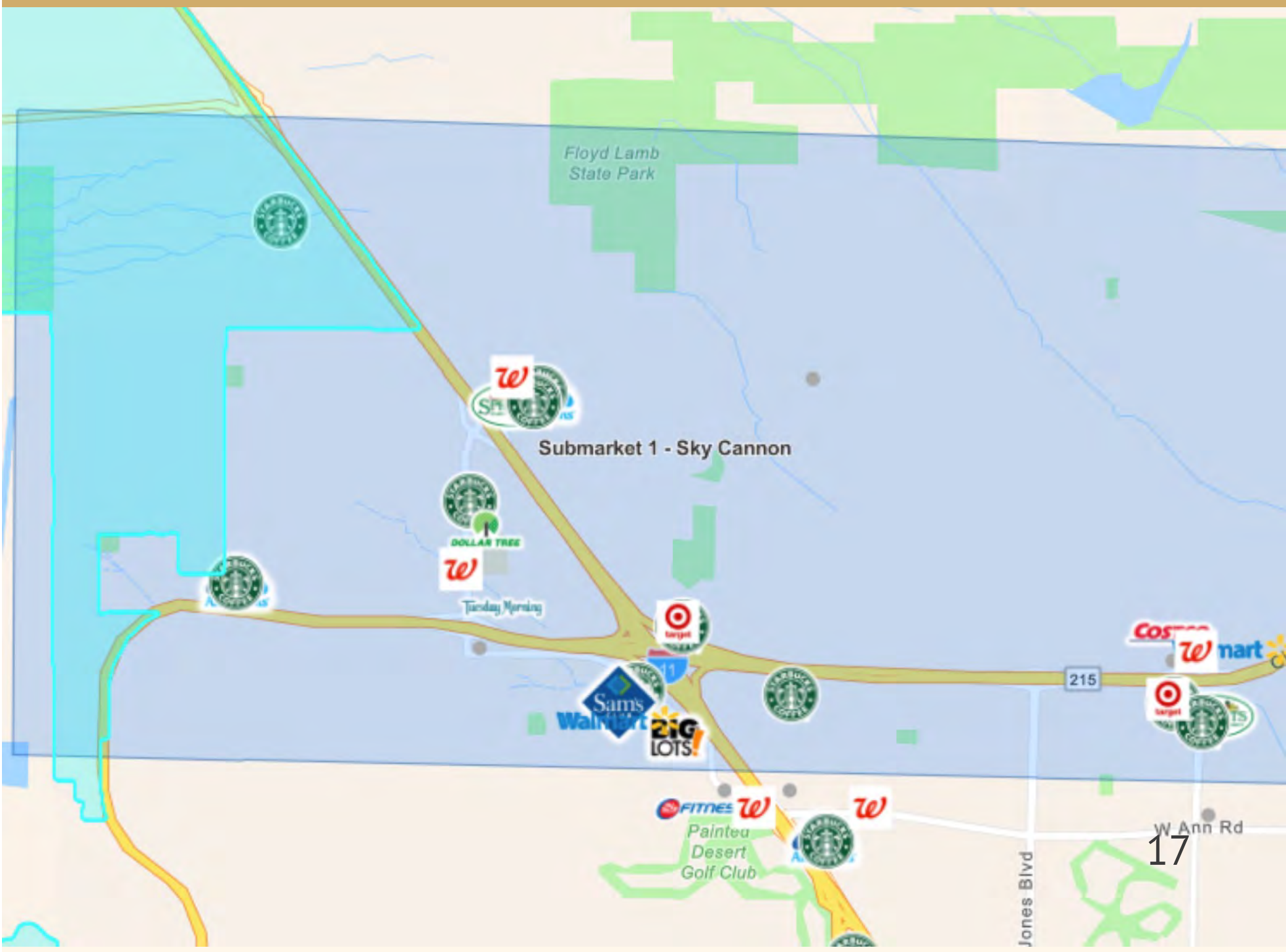
- Primarily married couples with children and millennial first-time buyers.
- High concentration of dual-income households and remote professionals relocating from California and Arizona.
- Strong demand for parks, early education, and outdoor amenities.

Residential Development Highlights

- Active homebuilders: Century Communities, Woodside Homes, and Pulte Homes.
- Mix of entry-level and move-up homes in gated neighborhoods with integrated trails and recreation.
- New phases planned for 2025 to meet ongoing demand.

Commercial & Lifestyle Growth

- Skye Canyon Marketplace is expanding with restaurants, fitness centers, and essential services.
- Proximity to Durango Drive retail corridor and new healthcare/urgent care centers.
- Opportunities for child care centers, coffee shops, and service-based retail tailored to young families.



SUBMARKET 2

Summerlin West & South

Summerlin West & South – Las Vegas' Premier Master-Planned Corridor

Market Snapshot

	Median Home Price:	Year-over-Year Growth:	Median Household Income:	Median Age:
Summerlin West (89138)	\$807,500	+6.6%	\$157,000	44.3
Summerlin South (89135)	\$729,333	+7.9%	\$156,000	45.0

Family Demographics

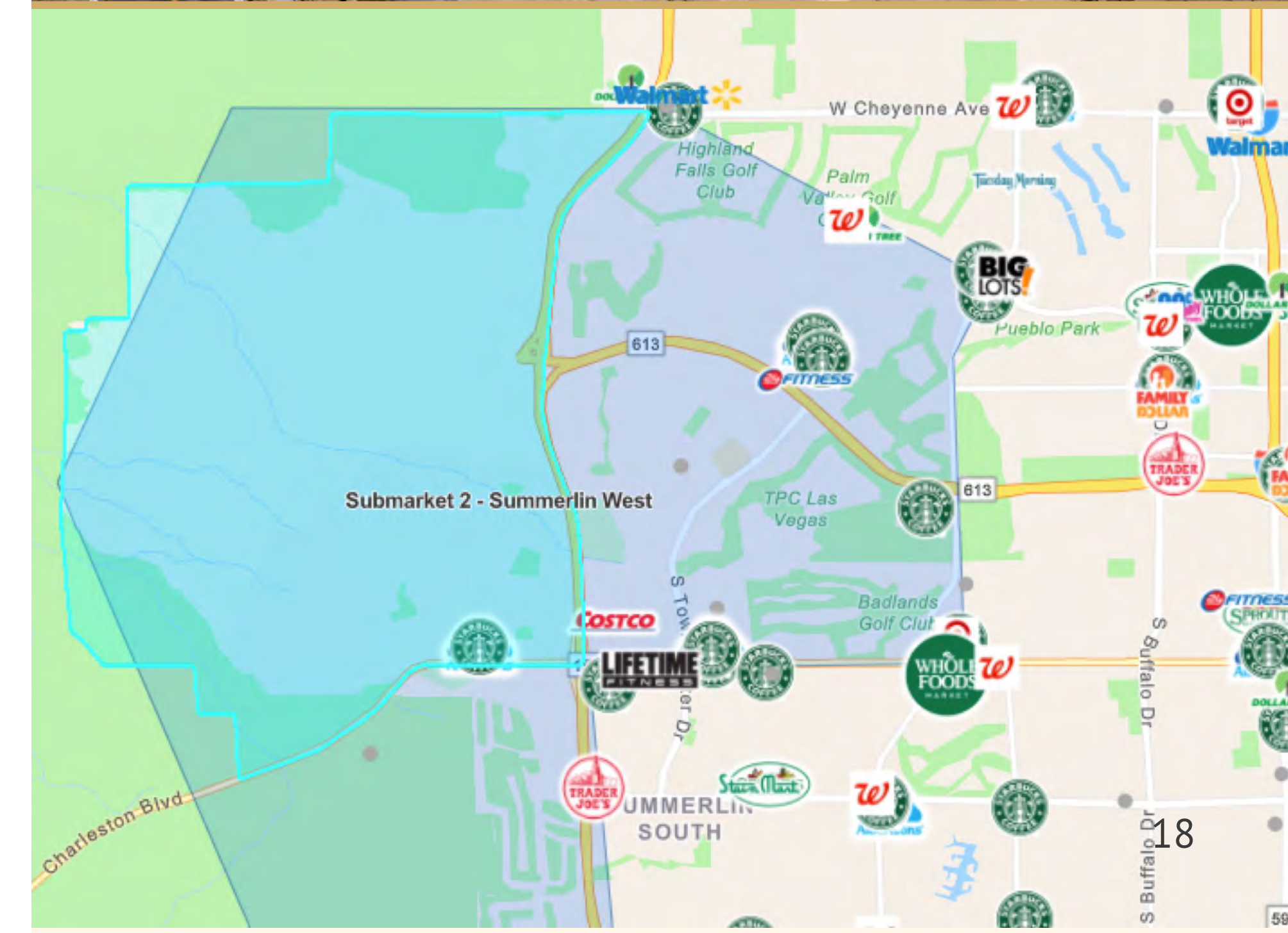
- Affluent, highly educated professionals and executives.
- High proportion of dual-income families, often with children in private or specialty schools.
- Strong appeal to California transplants seeking lifestyle quality, community security, and elite schooling.

Residential Development Highlights

- **Summerlin West:**
 - Active builders: Toll Brothers, Tri Pointe, KB Home, Woodside.
 - Redpoint & Redpoint Square offer high-density walkable living, while Stonebridge offers spacious family lots.
- **Summerlin South:**
 - Exclusive enclaves like The Ridges and The Cliffs with custom homes ranging \$2M–\$10M.
 - Ascension by Howard Hughes under construction, adding high-end single-family homes and new amenities.

Commercial & Lifestyle Growth

- Anchored by Downtown Summerlin, a 400-acre urban core with:
- Class A offices, luxury shopping, Red Rock Casino, and City National Arena.
- Retail demand is strong for premium grocery, fitness, and enrichment-based youth services.
- Future Development: Ongoing expansion of walkable neighborhood centers and medical campuses.
- Ideal conditions for high-end preschools, Montessori, and language/STEM-based early education centers.



Sky Cannon & Providence

Seven Hills & Anthem – Henderson’s Prestige Residential Core (ZIP 89052)

 Market Snapshot

Median Home Price:	Year-over-Year Growth:	Median Household Income:	Median Age:	Days on Market:
\$750,000	+6.2%	\$120,000	42.3	~36 (as of April 2025)

Family Demographics

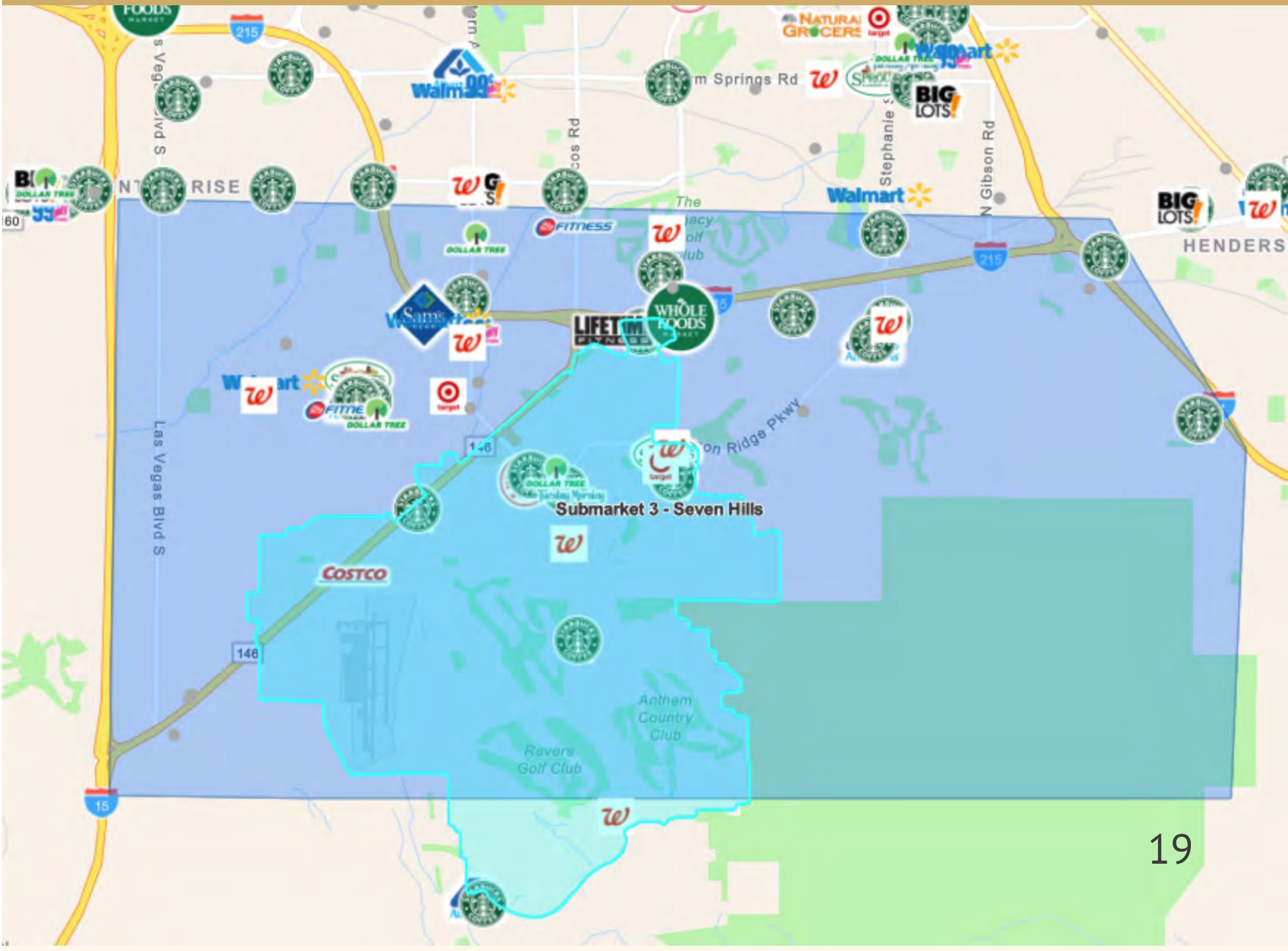
- Wealthy, stable population of professionals, retirees, and high-income families.
- High rates of home ownership, low transiency, and strong school engagement.
- Many residents work in healthcare, education, finance, or are semi-retired professionals.
- Strong demand for private education, extracurricular programs, and aftercare enrichment.

Residential Development Highlights

- Anthem Highlands: Large-lot homes with family-friendly layouts and access to parks.
- Sun City Anthem: Popular among affluent active seniors—adding intergenerational value to the area.
- Seven Hills: Luxury hillside homes surrounding the Rio Secco Golf Course, many with strip views and gated communities.
- Builders like Lennar, Beazer, and Century Communities continue limited infill with luxury and semi-custom options.

Commercial & Lifestyle Growth

- Close proximity to St. Rose Parkway medical corridor, home to hospitals, specialty care, and medical campuses.
- Retail anchored by The District at Green Valley Ranch, a premier shopping/dining destination.
- Strong mix of high-end fitness centers, wellness providers, and family services.
- **Preschool Opportunity Insight:**
- High demand for elite early learning—parents prioritize safety, academics, and brand reputation.
- Underserved by bilingual and Montessori options.
- Ideal for **Reggio Emilia, STEM-based, or enrichment-forward** models catering to discerning families.



Las Vegas Market Overview

Las Vegas Market Overview: Economic Stability, Population Growth & Early Education Opportunity

Las Vegas is undergoing a dynamic transformation from a tourism-centric economy to a diversified hub of innovation, healthcare, logistics, and entertainment. With a 2.1% population growth in 2024 and continued migration from high-cost states like California and Arizona, the metro area is rapidly expanding—especially across family-oriented suburban corridors. Major employers like MGM Resorts, UNLV, Valley Health, and Amazon anchor the job market, while infrastructure investments like the Brightline West high-speed rail and the \$1.75B A's stadium reinforce long-term economic momentum. Demographically, the Las Vegas MSA boasts a median household income of \$76,000 and nearly 900,000 households, many of whom are dual-income families seeking high-quality early childhood education. These families are concentrated in upwardly mobile neighborhoods that align closely with customer profile, such as Workday Drive, Up and Coming Families, and Professional Pride segments. Despite this growth, the early childhood education (ECE) sector remains fragmented and under-built in key areas. Rising demand—driven by population influx and limited provider capacity—has created significant whitespace, particularly in fast-growing submarkets like:



Skye Canyon & Providence

Young families, rising inventory, and new home construction make this a prime zone for mid-market childcare offerings.



Summerlin West & South

High-income, education-focused families are seeking elite preschool brands in a supply-constrained, master-planned community.



Seven Hills & Anthem

This affluent Henderson enclave has strong demand for bilingual, STEM, and Montessori programs among professional and semi-retired families.

When combining economic momentum, favorable demographics, aggressive residential development, and updated policy incentives—including Nevada's \$30M PDG B-5 grant—the result is a highly investable ECE landscape.



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