

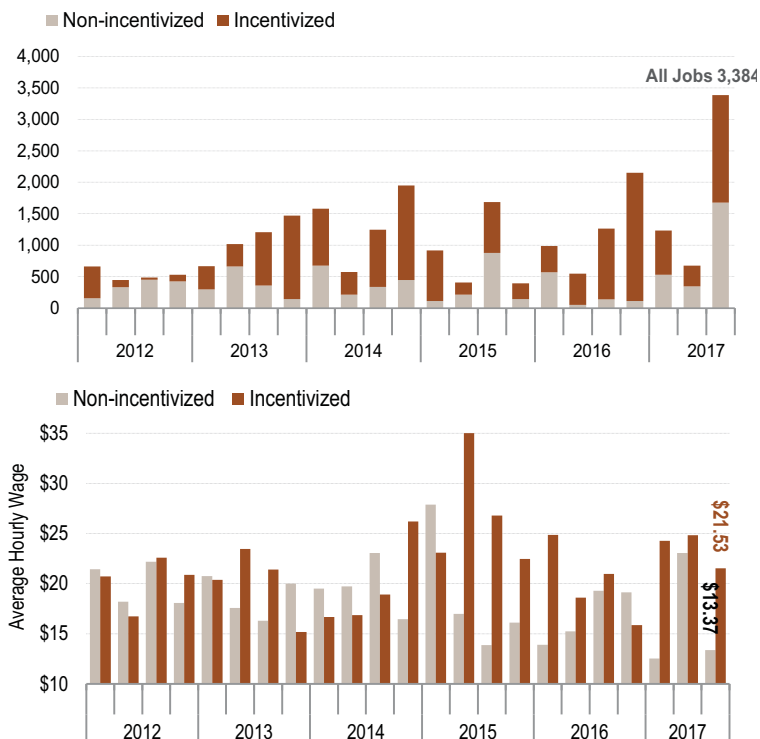
JOBS ANNOUNCED BY ASSISTED COMPANIES

There were 3,384 assisted jobs added to Nevada's economy in the third quarter of 2017. These jobs were brought in by 27 companies; eight are existing companies expanding operations and 19 are new to Nevada. Of the 27, ten were manufacturers, eight were logistics and operations related, and two each in aerospace and defense, business information technology ecosystems, and mining. The balance were in the healthcare and tourism sectors.

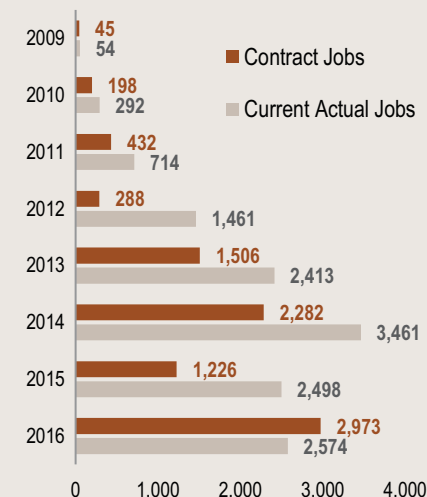
WAGES PAID BY ASSISTED COMPANIES

The average hourly wage paid by assisted companies in the second quarter was \$17.49. This reflects a \$6.40 hourly decrease from the previous quarter, and \$3.29 from a year ago. Worker pay for companies receiving incentives was \$21.53 per hour as compared to non-incentivized company pay of \$13.37 an hour.

ANNUAL ASSISTED COMPANY STATISTICS



CONTRACT AND ACTUAL JOBS BY NEW INCENTIVIZED COMPANIES



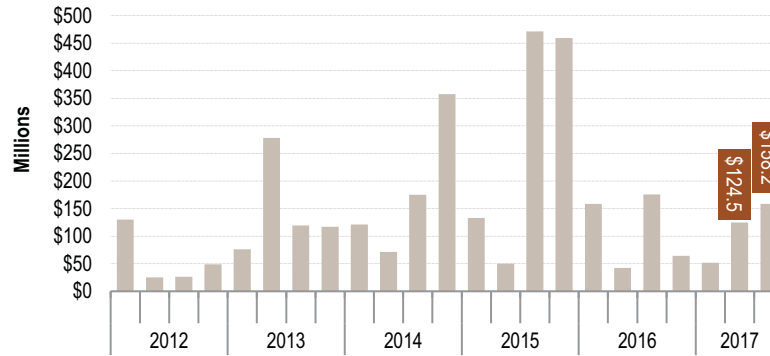
As new incentivized companies add staff, the number of actual jobs has exceeded those that were contracted.

	ALL COMPANIES				INCENTIVIZED COMPANIES				NON-INCENTIVIZED COMPANIES						
	COMPANIES	INITIAL JOBS	BUILD-OUT JOBS	AVERAGE WAGE	CAPITAL INVESTMENT	COMPANIES	INITIAL JOBS	BUILD-OUT JOBS	AVERAGE WAGE	CAPITAL INVESTMENT	COMPANIES	INITIAL JOBS	BUILD-OUT JOBS	AVERAGE WAGE	CAPITAL INVESTMENT
2012	71	2,130	2,494	\$19.98	\$2,230,592,312	19	762	1,111	\$20.22	\$1,136,341,201	52	1,368	1,383	\$19.85	\$1,094,251,111
2013	105	4,363	9,602	\$18.50	\$590,733,144	47	2,902	7,867	\$18.68	\$469,574,739	58	1,461	1,735	\$18.14	\$121,158,405
2014	94	5,351	14,284	\$20.61	\$5,675,338,900	29	3,674	11,878	\$21.14	\$5,431,594,324	65	1,677	2,406	\$19.43	\$243,744,576
2015	86	3,406	7,186	\$22.62	\$5,116,142,613	53	2,056	5,465	\$27.15	\$5,061,620,607	33	1,350	1,721	\$15.77	\$54,522,006
2016	60	4,956	8,057	\$17.99	\$728,622,702	33	4,080	6,368	\$18.52	\$706,798,202	27	876	1,689	\$15.52	\$21,824,500
2017YTD	59	5,295	8,142	\$20.88	\$343,559,838	29	2,740	4,796	\$22.63	\$266,990,921	30	2,555	3,346	\$14.52	\$76,568,917

ASSISTED COMPANY INVESTMENT

Capital investment by assisted companies came in at \$158.2 million in the third quarter. This reflects a \$33.6 million, or 27.0 percent increase from the second quarter, and 9.8 percent, or \$17.2 million decline from what it was in the third quarter of last year.

Note: Excludes large scale projects like Boulder Solar Power (\$1B), Apple (\$1B), Tesla (\$5B), or companies that qualified for Aviation or Data Center abatements.



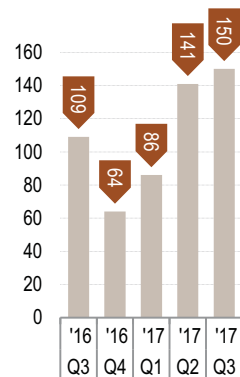
RECRUITMENT ACTIVITY

2016 Q3 - 2017 Q3

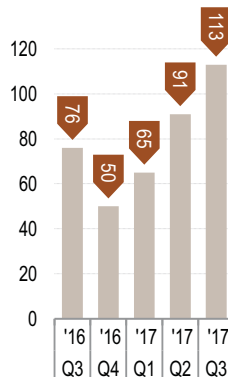
There were 27 wins in the third quarter. This represents a 58.8 percent increase from the second quarter, and 28.6 percent increase from the same quarter of last year.

The number of New Leads and Prospects as reported by RDA's across the state also grew over the period. New Leads were up by 6.4 percent, and Prospects by 24.2 percent when compared to the second quarter.

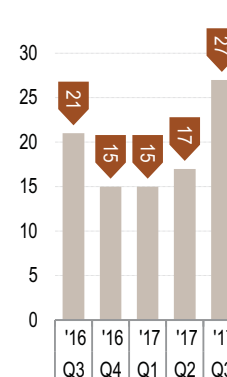
NEW LEADS



NEW PROSPECTS

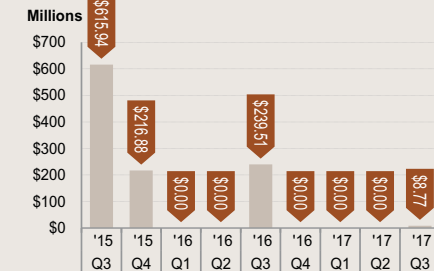


WINS



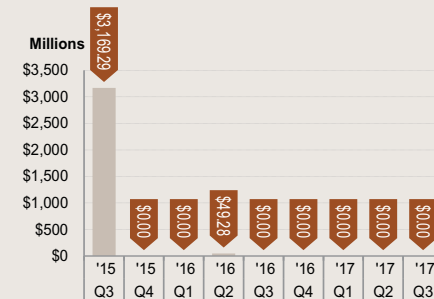
CAPITAL INVESTMENT BY ASSISTED AVIATION AND DATA CENTER COMPANIES

AVIATION COMPANIES



Capital investment made by companies approved for Aviation Tax Abatements in the third quarter came in at \$8,767,498. Since July 2015, there have been 16 aviation companies approved for the abatement. In total, these companies are expected to invest \$1.1 billion.

DATA CENTERS



No companies applied for the Data Center Tax Abatements in the second quarter. Since inception in July 2015, total capital investment by the four companies approved for Data Center abatements was \$3.2 billion.

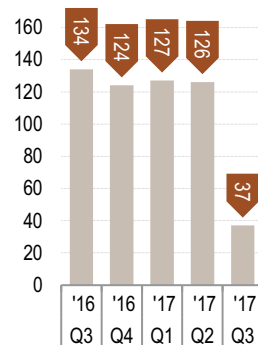
GLOBAL RECRUITING

In the third quarter, there was one lead and three prospects added to the Global Recruiting Pipeline.

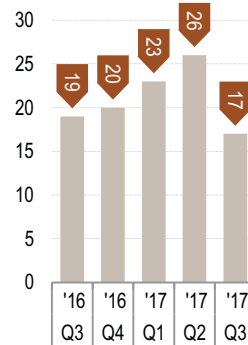
After removing those which have become inactive, the current inventory of all active global leads now stands at 37 and prospects at 17.

There were no new wins in the third quarter.

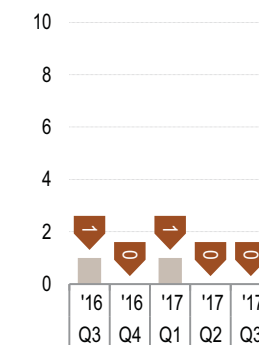
ACTIVE LEADS



ACTIVE PROSPECTS



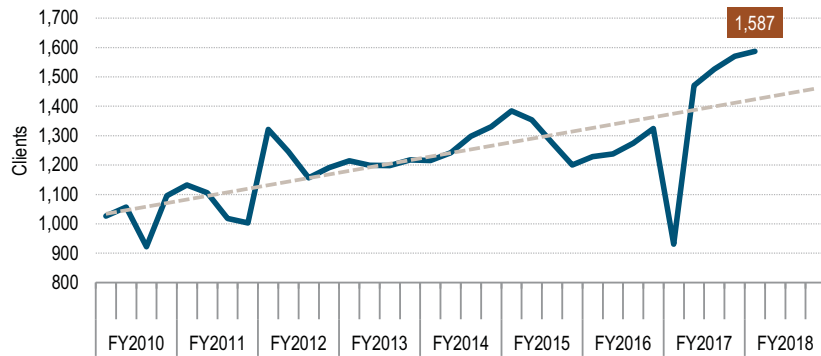
WINS



INTERNATIONAL TRADE

- » In July, Governor Sandoval led a State Trade Mission to South America with meetings in Panama, Peru, and Chile. The delegation included representatives from mining, higher education, and business.
- » In the third quarter, GOED sponsored 16 Nevada small businesses by awarding them over \$47,000 in financial assistance through the SBA State Trade Expansion Program (STEP) Grant. These funds were further leveraged to generate over \$1.2 million in export related sales.
- » In September, the International Trade Division conducted an advance planning and follow up mission to Poland, Finland, and the Czech Republic in preparation for the Governor's Trade Mission to Europe in October. During the visit, the Government of Finland indicated that Nokia would like to conduct testing and research operations in Nevada.
- » The International Trade Division also conducted a follow-up trip to Queensland, South Australia, and New South Wales in September to build on relationships established during the 2016 trade mission. During the trip, a sister-state agreement and a joint funding mechanism around the commercialization of water and mining technology with the Government of Queensland was pursued.
- » Two inbound delegations were also hosted by the International Trade Division in the third quarter. These included site visits by a steel microprocessing plant from India and a lithium-battery company from the Czech Republic.

PROCUREMENT TECHNICAL ASSISTANCE CENTER



	CLIENTS	PRIME CONTRACT AWARDS			SUBCONTRACT AWARDS		
		NO.	AMOUNT	AVERAGE	NO.	AMOUNT	AVERAGE
FY 2012	1,229	232	\$27,806,562	\$119,856	46	\$27,207,340	\$591,464
FY 2013	1,207	272	\$81,759,231	\$300,585	23	\$4,013,194	\$174,487
FY 2014	1,271	395	\$56,083,310	\$141,983	47	\$6,030,228	\$128,303
FY 2015	1,303	338	\$67,021,273	\$198,288	31	\$7,260,074	\$234,196
FY 2016	1,266	366	\$42,579,799	\$116,338	38	\$9,634,197	\$253,532
FY 2017	1,375	662	\$129,047,457	\$194,936	43	\$4,326,685	\$100,621
FYTD 2018	1,587	406	\$112,991,960	\$278,305	12	\$12,968,857	\$1,080,738

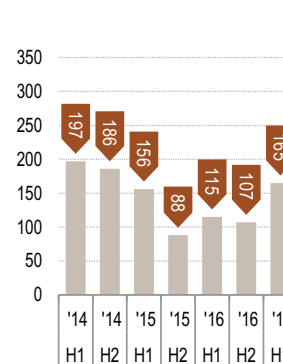
PROCUREMENT TECHNICAL ASSISTANCE CENTER

OVERVIEW FYTD2018

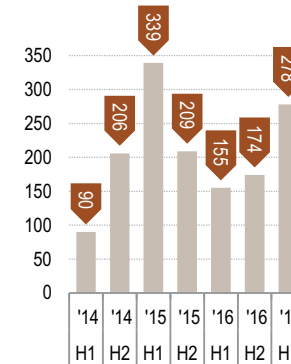
- » The Nevada Procurement Technical Assistance Center (PTAC) had a very successful quarter with the most clients, contracts, and contract amount on record. The number of clients had improved by 70.5 percent, contracts by 338.0 percent, and contract amount by 480.6 percent when compared to the same period a year ago.
- » At the end of July, Nevada PTAC was awarded another cost sharing cooperative agreement with the U.S. Defense Logistics Agency (DLA) to continue providing counseling services to Nevada businesses seeking local, state, and federal government contracts.

EMERGING SMALL BUSINESS PROGRAM

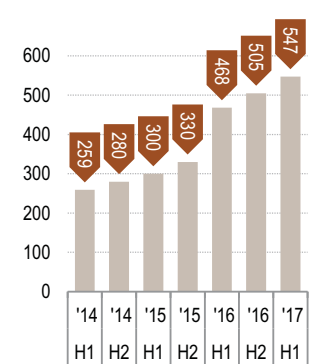
BUSINESSES CERTIFIED



BUSINESSES SOLICITED



CONTRACTS AWARDED



	BUSINESSES CERTIFIED	BUSINESSES SOLICITED	CONTRACTS NO.	CONTRACTS AMOUNT	CONTRACTS AVERAGE
January - June 2014	197	90	259	\$919,458	\$3,550
July - December 2014	186	206	280	\$1,847,251	\$6,597
January - June 2015	156	339	300	\$2,059,812	\$6,866
July - December 2015	88	209	330	\$2,897,894	\$8,781
January - June 2016	115	155	468	\$3,671,437	\$7,845
July - December 2016	107	174	505	\$5,721,589	\$11,330
January - June 2017	165	278	547	\$4,497,936	\$8,222

EMERGING SMALL BUSINESS PROGRAM

OVERVIEW

- » The current number of Certified Emerging Small Businesses (ESB's) has expanded by 19.4 percent since the end of last year to a total of 1,014.
- » The number of ESB's solicited to submit a quote, bid, or proposal on a contract in the first half of 2017 was up by 59.8 percent over the previous period.
- » The number of contracts grew by 8.3 percent while the amount slipped by 21.4 percent.
- » Average contract amount for the first half of 2017 is 2.3 percent above the historical average of \$8,038.

NEVADA FILM OFFICE

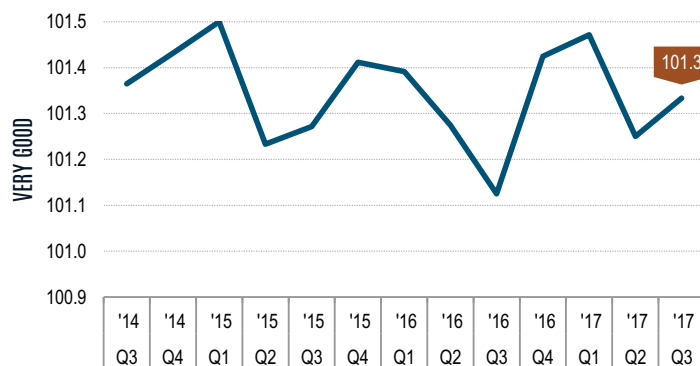
NEVADA FILM OFFICE
ANNUAL PRODUCTION REVENUE*

FISCAL YEAR	NUMBER OF PRODUCTIONS	REVENUE*
2005	789	\$120,208,978
2006	776	\$102,945,418
2007	425	\$113,748,400
2008	436	\$82,727,400
2009	361	\$91,900,600
2010	367	\$81,130,250
2011	479	\$102,525,600
2012	520	\$88,783,700
2013	559	\$67,571,708
2014	370	\$58,716,755
2015	500	\$65,159,732
2016	495	\$73,160,712
2017	501	\$40,134,588
2018YTD	94	15,118,140

*Revenue to Nevada, i.e. local production expenditures.

CLIENT SATISFACTION INDEX

100=AVERAGE



VERY GOOD = 101.5-100.9 | GOOD = 100.9-100.3 | AVERAGE = 100.3-99.7 | POOR = 99.7-99.1 | VERY POOR = 99.1-98.5

Customer responses to the Nevada Film Office Client Satisfaction Survey improved in the most recent quarter to 101.3 and is well within the “very good” range of 101.5 and 100.9.

The Index is an aggregate measure on how customers rated their experience on availability, responsiveness, knowledge, willingness to help, and overall level of service. Since 2014, customer satisfaction with the Nevada Film Office has consistently been very good.

NEVADA FILM OFFICE
SIGNIFICANT PROJECTS* FY2018 YTD

PROJECT	PROJECT TYPE
Who Wants To Be A Millionaire - Season 16	TV Series
Smiley Face Killers	Feature Film (Independent)
Asics "As I Move Me"	Commercial
Ultimate Fighter Season 26	TV Series
VMA's Remote Performance at Palms	TV Special
Intel Drone Light Show at Bellagio Fountains	Corporate / Industrial

*More than \$500,000 in local production expenditures.

COMMUNITY DEVELOPMENT BLOCK GRANTS

YEAR	NO. OF GRANTS	ALLOCATION	AVERAGE GRANT AWARD	PERCENT ECONOMIC DEVELOPMENT
2011	32	\$2,612,161	\$81,630	17%
2012	27	\$2,170,726	\$80,397	13%
2013	22	\$2,445,704	\$111,168	9%
2014	24	\$2,439,168	\$101,632	22%
2015	20	\$2,544,500	\$127,225	84%
2016	18	\$2,487,320	\$138,184	68%
2017	17	\$3,263,851	\$191,991	NA

2017 GRANTS

- » The 2017 grant cycle allocation increased to \$3,263,851 with Carson City reverting to the state.
- » With the recent increase in allocation, project recommendations for funding are under review for final approval, and will be reported in the fourth quarter.

GRANT PROGRESS

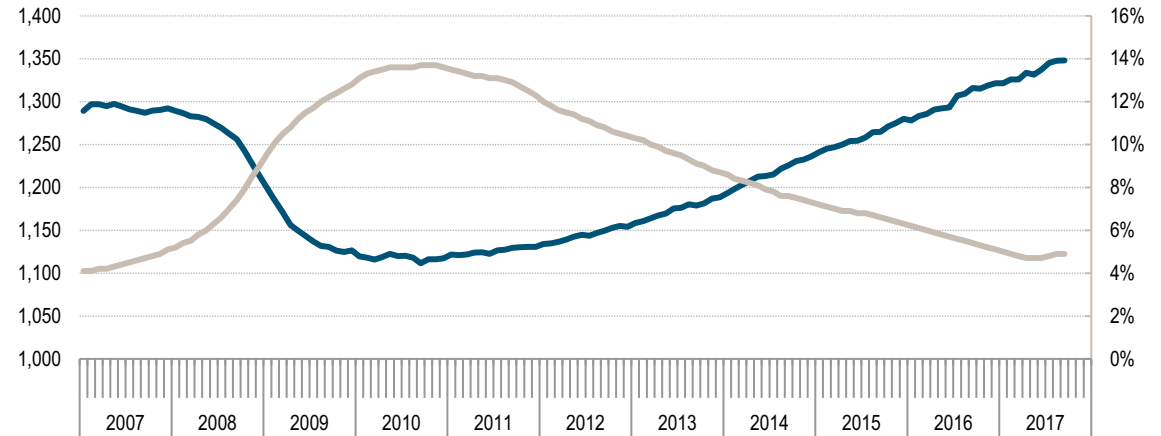
- » During the third quarter, \$85,345 was paid to three rural communities and two rural cities.
- » CDBG staff closed one grant in one rural community representing \$247,830 in CDBG funds. This project contributed an additional \$51,502 in leveraged funds.
- » Closed grants in the quarter impacted over 4,646 Nevadans, of which, 72 percent were considered Low to Moderate Income.
- » There are currently 33 open grants: 1 from 2015, 15 from 2016, and 17 from this year's program funds.

NEVADA JOBS AND UNEMPLOYMENT

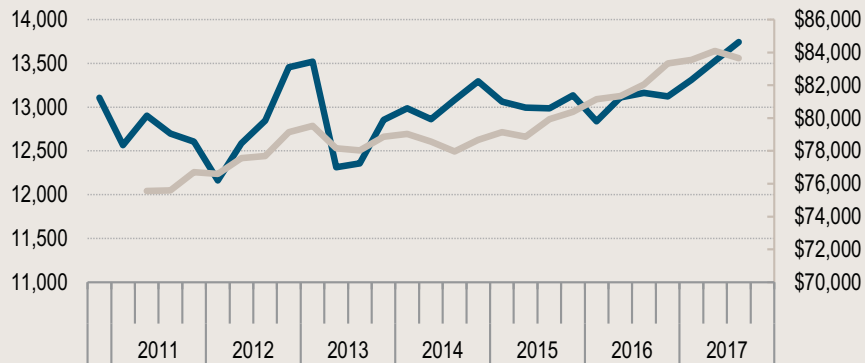
In September Nevada's job count was 50,800 above its pre-recession high and now stands at 1,348,000. This is an improvement of 236,500 positions over the same month seven years ago when the state's job count was at its recessionary low of 1,111,200.

Over the same period, the unemployment rate has dropped over 64 percent from the recessionary high of 13.7 percent to the current rate of 4.9 percent. The pre-recession unemployment low was 3.9 percent.

— Jobs (in thousands) — Unemployment Rate

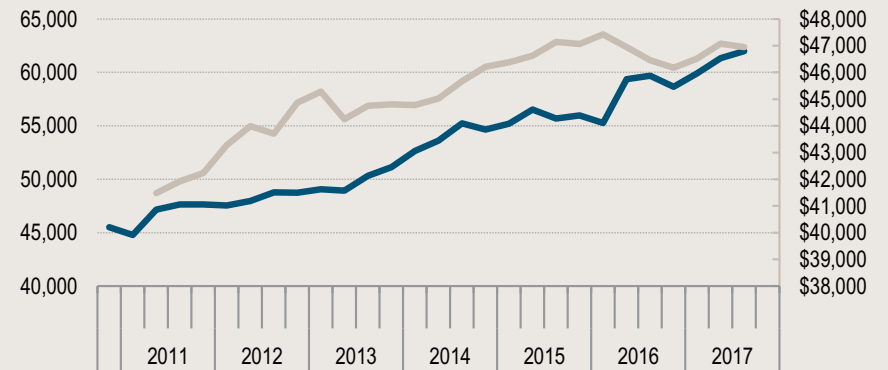


AEROSPACE AND DEFENSE



There are currently 13,700 workers in Nevada's Aerospace and Defense sector after the addition of 218 jobs to the industry group. Average annual earnings, however, fell by \$440 and now stand at \$83,700.

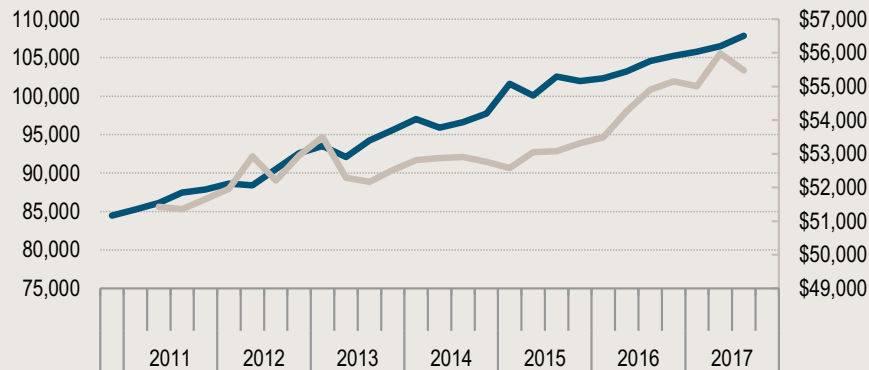
BUSINESS INFORMATION TECHNOLOGY



The number of jobs in Nevada's Business Information Technology sector expanded in the third quarter with the addition of 670 positions. Earnings were essentially unchanged with only a slight drop of \$140 per year. Currently, there are 62,000 people employed in the sector making an average annual wage of \$47,000.

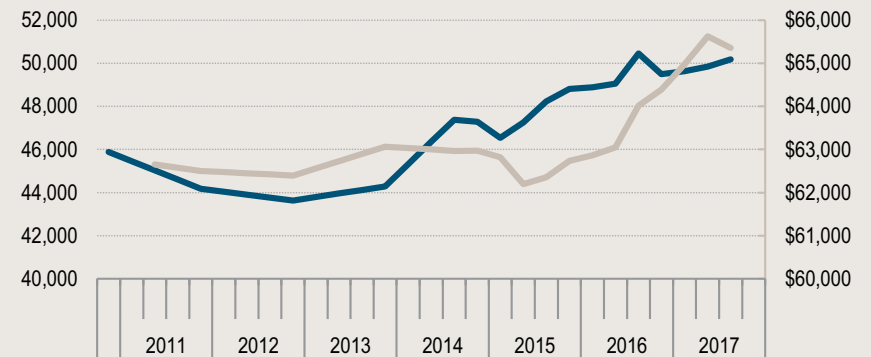
— Jobs — Average Earnings per Job

HEALTH AND MEDICAL



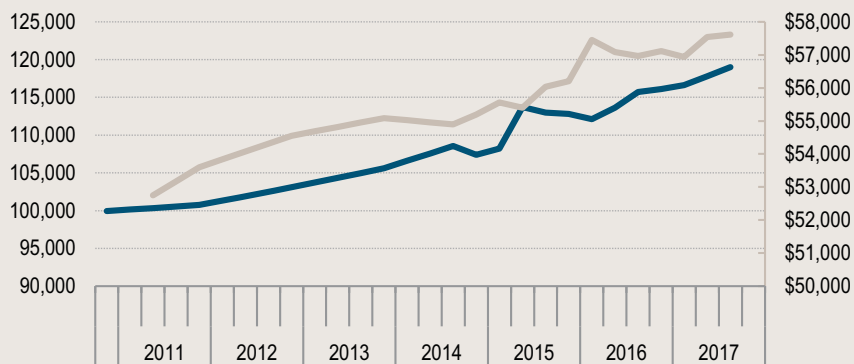
Jobs and earnings sent mixed signals in Nevada's Health and Medical sector with the addition of 1,400 workers and the loss of \$500 in annual earnings. Overall, Nevada's healthcare sector now employs 107,800 workers with average annual earnings of \$55,500.

NATURAL RESOURCE TECHNOLOGIES



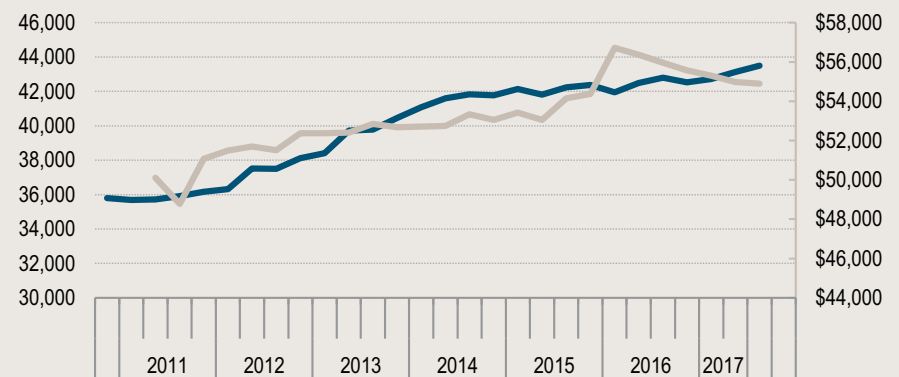
There are currently 50,100 workers in Nevada's Natural Resource Technologies sector after the addition of 350 jobs to the industry group. Average annual earnings, however, dipped by \$300 and now stand at \$65,400.

MANUFACTURING AND LOGISTICS



The number of jobs and average annual earnings in Nevada's Manufacturing and Logistics sector both improved in the third quarter. Job counts grew by almost 1,200 for a total of 119,000 workers employed in the sector. Average annual earnings also grew to \$57,600 with the addition of \$200 per year.

MANUFACTURING

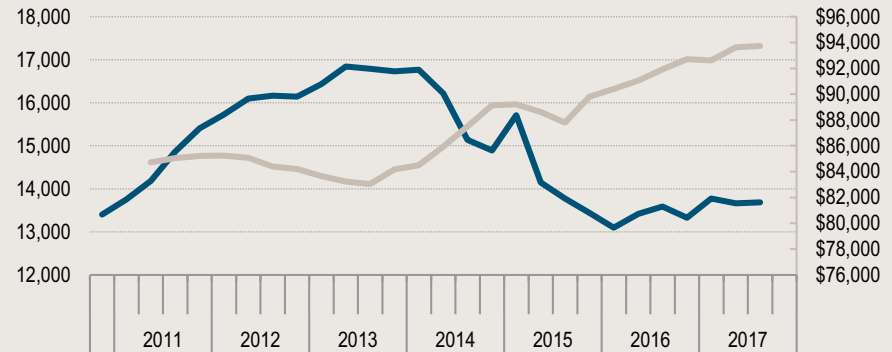


Average annual earnings in Nevada's Manufacturing sector were unchanged in the third quarter and currently stand at \$54,900. Jobs, however, bumped up with the addition of 400 workers bringing total employment in the sector to 43,500.

— Jobs — Average Earnings per Job

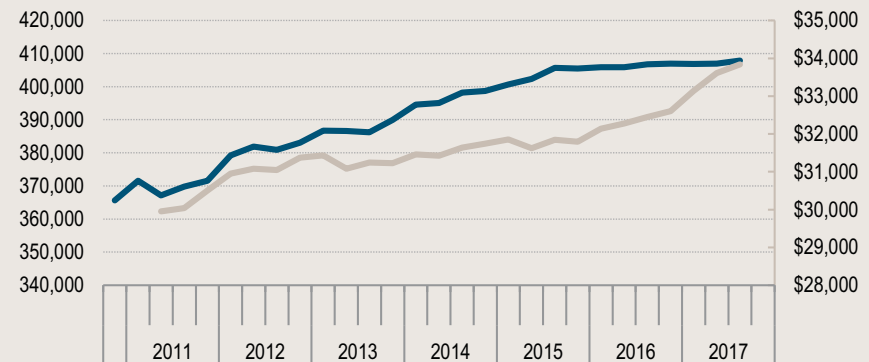
MINING

Both job counts and average annual earnings in Nevada's Mining sector were unchanged in the third quarter. Currently there 13,700 workers employed in the sector making, on average, \$93,700.



TOURISM, GAMING, AND ENTERTAINMENT

Both the number of jobs and annual earnings grew in Nevada's Tourism, Gaming, and Entertainment sector in the third quarter. When compared to last quarter an additional 900 jobs were added to the sector, with average earnings improving \$270 a year. In total, Nevada's largest industry sector now employees 408,000 workers who make, on average, \$33,800 per year.



— Jobs — Average Earnings per Job