JOBS ANNOUNCED BY ASSISTED COMPANIES

There were 410 assisted jobs added to Nevada’s economy in the second quarter of 2015. These jobs were brought in by 13 companies; 11 are new to Nevada and two are existing companies expanding operations. Of the 13, seven are manufacturing operations.

WAGES PAID BY ASSISTED COMPANIES

The average hourly wage paid by assisted companies jumped by $9.72 to $33.39 in the second quarter. This increase was largely driven by the 20 very high-paying Fidelity National Financial jobs. If that company were removed from this quarter’s statistic, the average wage would have been $19.42.

PROJECTED JOBS FROM ASSISTED COMPANIES

For the year ending June 2015, there were 77 assisted companies slated to add 5,702 jobs to Nevada’s economy. These jobs are expected to come online within one year of announcing expansion or relocation. Once they are fully staffed, the five-year projected build-out job count is expected to be 15,023.

ANNUAL ASSISTED COMPANY STATISTICS

With the assistance of economic development agencies across the state, 34 companies added 1,326 jobs to Nevada’s economy in the first half of Calendar Year 2015. Although these metrics are below those measured in the same period last year, the average wage has improved significantly.

<table>
<thead>
<tr>
<th>YEAR</th>
<th>ASSISTED JOBS</th>
<th>AVG. WAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>29</td>
<td>$17.29</td>
</tr>
<tr>
<td>2010</td>
<td>32</td>
<td>$18.45</td>
</tr>
<tr>
<td>2011</td>
<td>42</td>
<td>$18.48</td>
</tr>
<tr>
<td>2012</td>
<td>74</td>
<td>$19.93</td>
</tr>
<tr>
<td>2013</td>
<td>113</td>
<td>$18.70</td>
</tr>
<tr>
<td>2014</td>
<td>97</td>
<td>$20.65</td>
</tr>
<tr>
<td>2015YTD</td>
<td>34</td>
<td>$26.68</td>
</tr>
</tbody>
</table>
ASSISTED COMPANY INVESTMENT

Capital investment by assisted companies came in at $50.2 million in the second quarter. Over 56 percent of that investment was made by Natural Resource companies, followed by Manufacturing at 18.5 percent.

RECRUITMENT ACTIVITY

2014 Q2 - 2015 Q2

The number of wins were down in the second quarter, while activity reported in the earlier stages of the recruitment pipeline continued to improve. This sends a positive signal for future job and investment growth.

GLOBAL RECRUITING

In the second quarter of 2015, there was a slight decline in the cumulative number of Global leads and prospects as there were less generated in the current period than became inactive from previous periods. In total there are currently 56 active leads and 12 verified prospects.

INTERNATIONAL TRADE

» In April, GOED’s Director of International Trade traveled to Ireland, England, Poland, Germany, and Italy to meet with representatives and delegates in preparation for the Governor’s European trade mission held in July. To date, this was the most complex trade mission facilitated by GOED.

» During the months of May and June, GOED’s International Division focused its attention on preparing the Governor’s European trade mission which included six different tracks and five countries: the Governor’s track, Education and Workforce Development, Nevada Commission on Tourism, Las Vegas Convention and Visitors Authority, the Nevada Water Center of Excellence, and international trade.
**PROCUREMENT TECHNICAL ASSISTANCE CENTER**

**ACCOMPLISHMENTS FY2015**

» The number of active Procurement Technical Assistance Center (PTAC) clients dropped by 9.8 percent from a year ago, while contract amounts have increased by 16.8 percent over the same period.

» PTAC met or exceeded all their current quarter and annual goals as established by the Defense Logistics Agency.

» Regular communication, consistent outreach, and quality events by PTAC staff continue to improve the active client base and their access to government markets.

<table>
<thead>
<tr>
<th>CLIENTS</th>
<th>PRIME CONTRACT AWARDS</th>
<th>SUBCONTRACT AWARDS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NO.</td>
<td>AMOUNT</td>
</tr>
<tr>
<td>FY 2012</td>
<td>1,191</td>
<td>215</td>
</tr>
<tr>
<td>FY 2013</td>
<td>1,217</td>
<td>247</td>
</tr>
<tr>
<td>FY 2014</td>
<td>1,330</td>
<td>325</td>
</tr>
<tr>
<td>FY 2015 YTD</td>
<td>1,200</td>
<td>300</td>
</tr>
</tbody>
</table>

**EMERGING SMALL BUSINESS PROGRAM**

**OVERVIEW**

» The current number of Certified Emerging Small Businesses has expanded by 40.7 percent since the end of last year and now stands at 539.

» Local Government agencies have until the end of September to report the number of solicitation or contract metrics. Soon after those are received the annual ESB activity report of both state and local agencies will be sent to the Governor’s Office, the Legislative Council Bureau, and posted on the GOED Web site.
Customer responses to the Nevada Film Office Client Satisfaction Survey were well above average in the second quarter. The majority of respondents, 85 percent, rated their experience as either “good” or “very good” on availability, responsiveness, knowledge, willingness to help, and overall level of service.
NEVADA JOBS AND UNEMPLOYMENT

Nevada’s job picture continues to show improvement. Both the number of workers and the unemployment rate continue to improve, and currently stand at 1,261,000 and 6.8 percent, respectively. This reflects a growth of almost 150,000 jobs and a drop of 6.9 percent in the unemployment rate since September 2010.

AEROSPACE AND DEFENSE

There was a loss of 70 jobs in Nevada’s Aerospace and Defense sector in the second quarter. Annual earnings also slipped slightly, falling by $300 mostly from the loss of a few, high paying aircraft manufacturing jobs. There are currently 13,000 Nevadans employed in this sector with average annual earnings of $78,900.

BUSINESS INFORMATION TECHNOLOGY

Both earnings and job counts improved in the Business Information Technology sector in the second quarter. An additional 1,300 jobs were added to the sector for a total of 56,500 employees making an average of $46,600 per year.
The number of jobs in Nevada’s Health and Medical sector dipped slightly in the second quarter with the loss of 1,300 positions. Wages, on the other hand, moved up by $240 per year. Currently, there are 56,500 people employed in the sector making an average annual wage of $46,600.

This is also the first quarter we will be tracking the Manufacturing and Logistics sector. It is an aggregation of what was the Manufacturing sector and the Logistics and Operations sector. This is now the second largest strategic growth sector representing 113,700 jobs which pay an average annual wage of $55,400.

This is the first quarter we will be tracking the Natural Resource Technologies sector. It is an aggregation of what was the Agriculture and Clean Energy sector, with the addition of Water Technologies. Currently, the sector represents 47,200 jobs that pay an average annual wage of $62,200.

The Manufacturing Sector makes up almost 37 percent of the Manufacturing and Logistics sector. Job growth and wages were essentially flat in the second quarter with a slight loss of 326 jobs and $327 in annual wages. Currently, there are 41,800 Nevadan’s employed in the sector making $53,000 per year.
MINING

Both earnings and jobs fell in Nevada’s Mining sector in the second quarter. These losses can be traced directly back to the drop in gold prices, with the loss of 1,800 jobs specific to gold mining. The sector currently employs 14,100 workers who make an average annual wage of $88,600.

TOURISM, GAMING, AND ENTERTAINMENT

There were an additional 3,300 jobs added to Nevada’s Tourism, Gaming, and Entertainment sector in the second quarter. This reflects an annualized growth rate of 3.2 percent and brings the total employment base to 406,000. Annual earnings, on the other hand, dropped slightly to $31,600; a $330 decrease from the previous quarter.