ECONOMY IN BRIEF

DETR RESEARCH & ANALYSIS BUREAU

September 2010

NEVADA'S PREMIER SOURCE OF WORKFORCE & ECONOMIC INFORMATION AND ANALYSIS

Economic Summary

Nevada's unemployment rate held steady at 14.4 percent in September, marking the first time since January that the rate failed to increase, and only the second time the rate did not increase since the recession began. In recent months, growth in unemployment has begun to subside, suggesting some stabilization. Since January, the unemployment rate increased 1.4 percentage points, but it has grown just two-tenths in the last three months. The slowing rate of increase suggests the labor market may finally be bottoming out, though September's nonfarm employment levels seem to suggest otherwise. Total nonfarm employment increased by 2,900 in September, thanks in large part to the return of seasonal workers in Nevada's educational system. The private sector on the other hand, failed to find traction, shedding 4,600 jobs over-the-month. In all, the recession continues to take its toll on Nevada's tourism and growth based economy.

For the most part, Nevada's employers had a rough September regardless of their industry type. Employment declined in all private sector industry groups except professional and business services, which added 400 jobs; and manufacturing, which held steady. The biggest job losers continue to be those most affected by the recession: leisure and hospitality and construction, which lost 1,600 and 1,500 jobs, respectively. Federal government employment continues to decline as the 2010 centennial census winds down. In September, an additional 600 temporary workers lost their jobs. Since peaking in May at 23,100 jobs, the federal government has reduced payrolls by 5,200 workers. Employment in Nevada's trade sectors remained flat, but with the holiday hiring season just around the corner, employers should start adding jobs over the next couple of months.

Unemployment Rate by County

Employment readings in Nevada's regional labor markets mirrored Statewide trends. Employers in the Las Vegas area added 2,900 workers in September. Government entities added 5,400 workers, while the leisure and hospitality and construction sectors shed 900 jobs each. In the Reno-Sparks area, employment increased by 100 jobs. Public sector employment increased by 1,600 jobs, while the private sector shed 1,500 jobs in total, led by losses in construction (-500) and leisure and hospitality (-300). Capital City employers bucked Statewide trends, where employers in government and professional and business services reduced employment levels by 100 jobs each, while all other major industry sectors remained unchanged.

Unemployment rates in each metropolitan area increased from August to September. The unemployment rate in

Economic Indicators

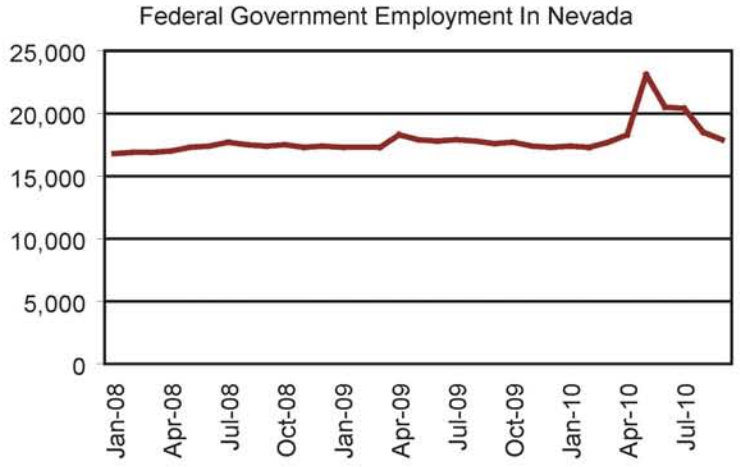
UNEMPLOYMENT RATES	Sep 2010
NEVADA *	14.4%
LAS VEGAS-PARADISE MSA	15.0%
RENO-SPARKS MSA	13.6%
CARSON CITY MSA	13.4%
ELKO MICROPOLITAN AREA	7.9%
UNITED STATES *	9.6%
CALIFORNIA *	12.4%
* Seasonally Adjusted	
JOB GROWTH (Y-O-Y)	
NEVADA	-2.1%
LAS VEGAS-PARADISE MSA	-2.4%
RENO-SPARKS MSA	-3.6%
CARSON CITY MSA	-2.4%
UNITED STATES	0.2%
CALIFORNIA	-0.4%
CONSUMER PRICE INDEX (Y-O-Y)	
UNITED STATES	1.1%
GAMING WIN (Y-O-Y)	
AUG 2009 - AUG 2010	
NEVADA	11.5%
CLARK COUNTY	13.9%
WASHOE COUNTY	-3.1%
TAXABLE SALES (Y-O-Y)	
AUG 2009 - AUG 2010	
NEVADA	4.8%
CLARK COUNTY	3.8%
WASHOE COUNTY	-1.4%

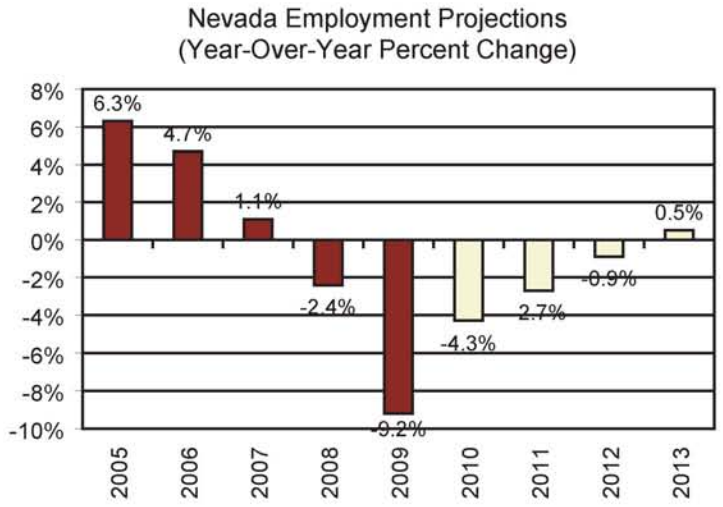
Economic Summary

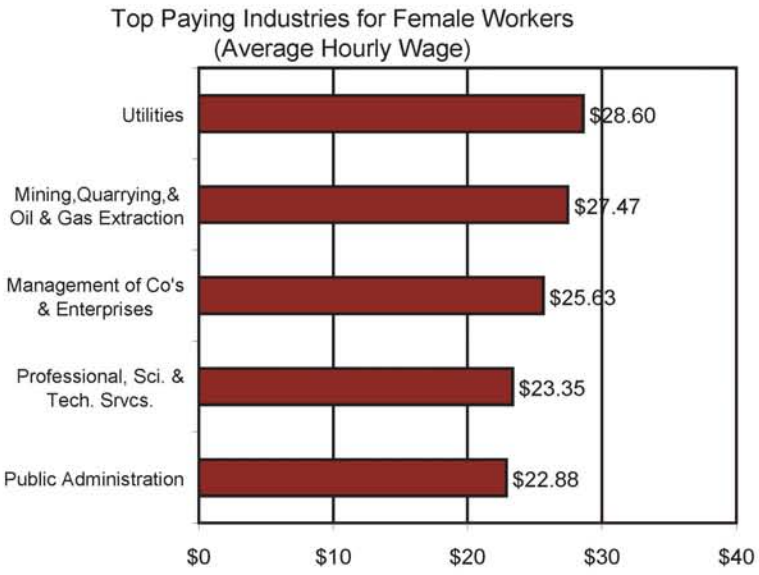
the Elko region (includes Elko and Eureka counties) increased three-tenths, growing to 7.9 percent. (Unemployment rates for the State's metropolitan areas are not adjusted for seasonality. For comparison purposes, the State's unadjusted unemployment rate was 14.5 percent in September, up from 14.2 percent in August.)

A number of economic indicators important to Nevada's fortunes have been showing signs of life in recent months. At the national level, personal income has improved, increasing nearly every month this year. Even in Nevada, incomes have seen growth. The question is: when and by how much will income growth translate to improvements in Nevada's tourism based economy? That translation has a lot to do with consumers' willingness and ability to pay for a trip to Nevada. While it's still early, we may be seeing some tentative signs of improvement. Visitation to Las Vegas has increased nearly every month in the last year. Also, in recent months, both taxable sales and gaming win recorded large over-the-year gains. In July, taxable sales surged 5.3 percent, driven by activity in food and beverage service and hotel accommodation. In August, gaming collections increased 11.5 percent. It is just the third increase since the start of the recession. While one month does not make a trend, following years of dismal tax collections, recent reports are step in the right direction.

While a number of economic indicators have improved, expectations for employment growth remain bleak. Recently released employment projections show considerable job loss through 2011. In 2012, job loss will subside significantly, but a weak economic climate will keep outright growth in check. Not until 2013, will the State see broad employment growth. Even then, expectations are for weak employment growth at best. The recovery will most certainly differ from





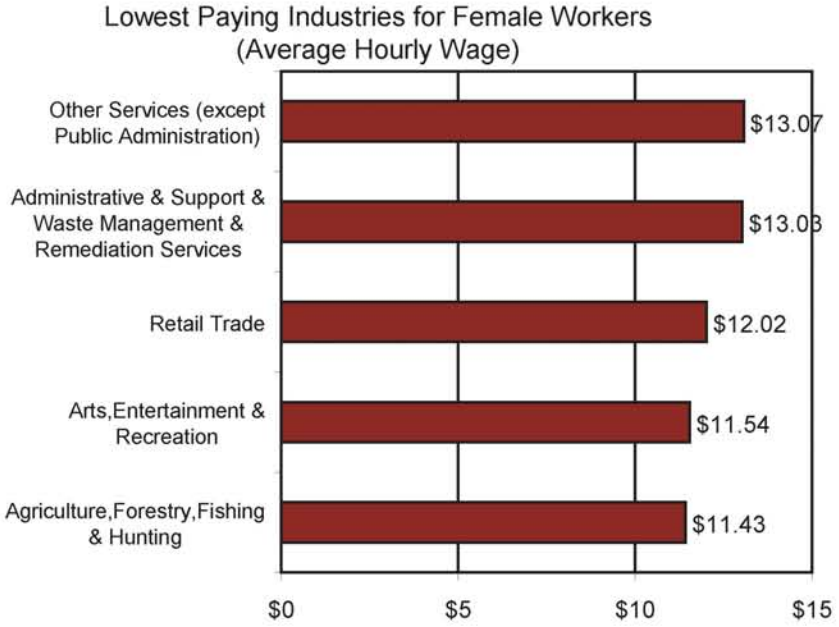


Economic Summary

typical rebounds, but this recession has been anything but typical. Following recent recessions, Nevada's economy boomed, driven by new growth and construction. Given its current state of high home foreclosures, falling prices and weak demand for new commercial development, new construction will not stimulate growth across the broader economy anytime soon.

Nevada's female workforce has been making progress in the workplace for some time. For instance, as noted in the March edition, the proportion of women in the workforce has increased over the years, so too have their income levels. Further analysis shows that some industries tend to pay better than others. Sectors paying top dollar to their female workers include utilities ($28.60 per hour); mining, quarrying, and oil and gas extraction ($27.47 per hour); and management of companies and enterprises ($25.63 per hour.) Occupations within these industries are generally professional in nature and require significant post secondary education and training. On the opposite end of the spectrum, industries paying the least tend to have occupations requiring little or no advanced training. These industries include agriculture, forestry, fishing and hunting ($11.43 per hour); arts, entertainment, and recreation ($11.54); and retail trade ($12.02 per hour.)

Another area female workers have seen improvement is in the pay they receive versus their male counterparts. In the last ten years, the proportion of female to male earnings grew by nearly 3 percent, rising from 68.6 percent to 71.5 percent. Despite the positive change though, there is still plenty of room for improvement. Men still earn $6.72 per hour more on average than their female counterparts. Regardless of the industry they work in, women earn less than men across the board. Industries with the largest discrepancies include management of companies and enterprises ($20.83 per hour); professional, scientific, and technical services ($16.68 per hour); and health care and social assistance ($16.40 per hour.) In the years ahead, the wages paid to male and female workers will likely converge as women continue to move into more high skilled occupations traditionally held by men.



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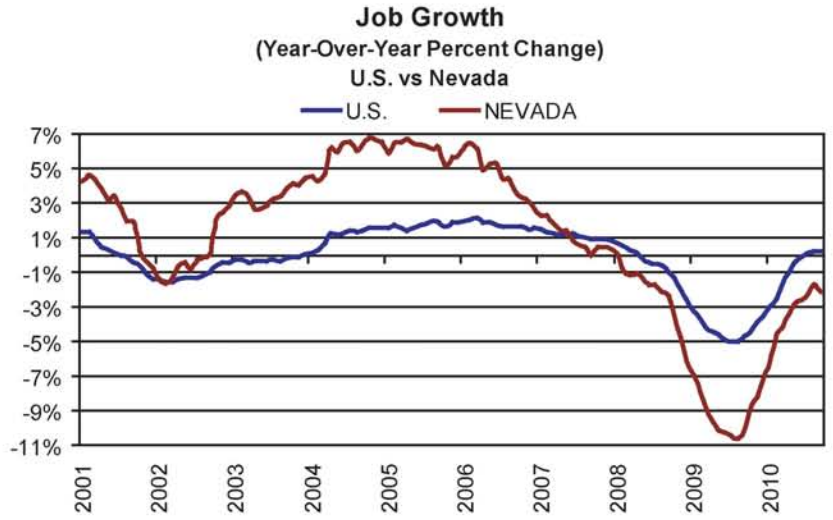
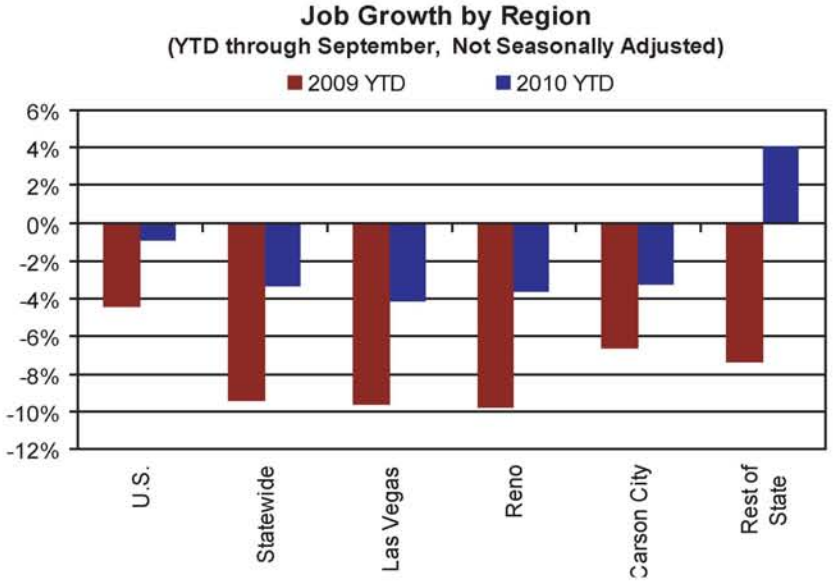
Trends at a Glance

Industrial Employment

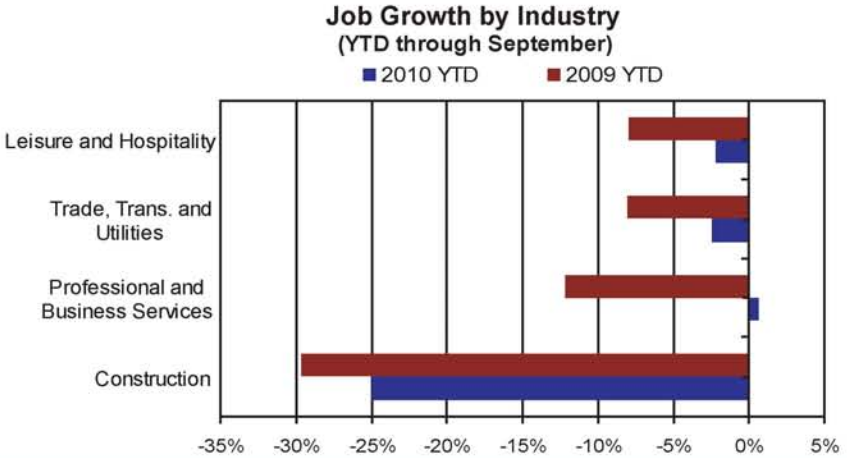
- Industrial employment in Nevada fell 2.1 percent in September relative to a year prior, equating to a loss of 23,700 jobs.
- September job readings were up 0.2 percent nationally relative to September 2009.



- The year-to-date annual growth rates remain higher than a year ago throughout all regions of the State.
- The Las Vegas MSA's job count fell 4.2 percent YTD in September relative to September 2009.
- In the Reno MSA, YTD job readings were down 3.6 percent in September 2010.
- In Carson City, employment fell 3.3 percent YTD from September 2009 to September 2010.
- Job growth was up 4.1 percent in non-metro areas of the State.



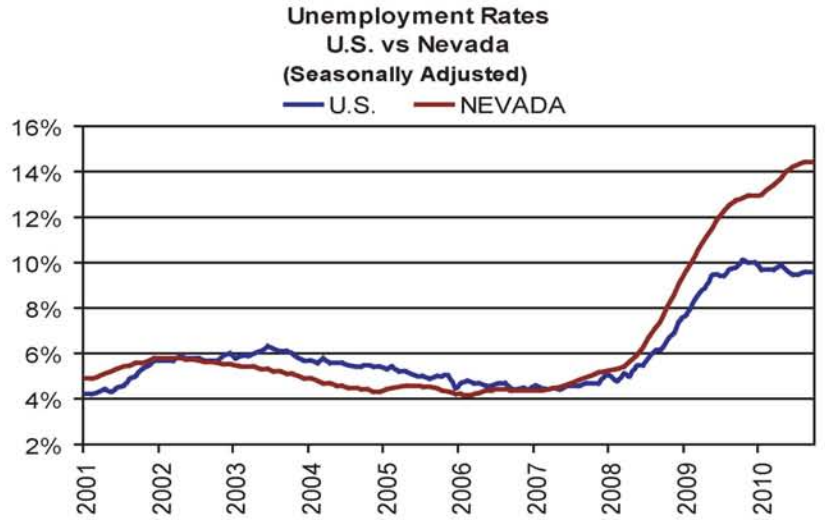
- Approximately 20,967 jobs have been lost in the construction industry YTD through September, a 24.9 percent annual decline, though the decline continued to slow for the fifth consecutive month. The YTD annual growth rate is higher relative to a year prior.
- Job losses in the State's largest industry, leisure and hospitality, continue to moderate. Industry employment was down 2.2 percent YTD through September relative to a year prior. A year earlier, job losses were down 8.0 percent over the same time frame.
- With the relative improvement of the past few months, professional and business services marked a positive figure at 0.7 percent YTD through September.



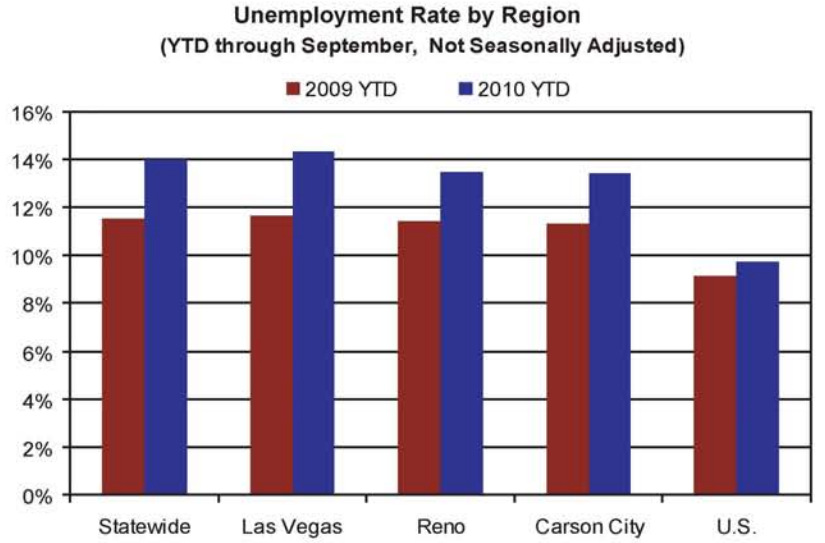
Trends at a Glance

Unemployment

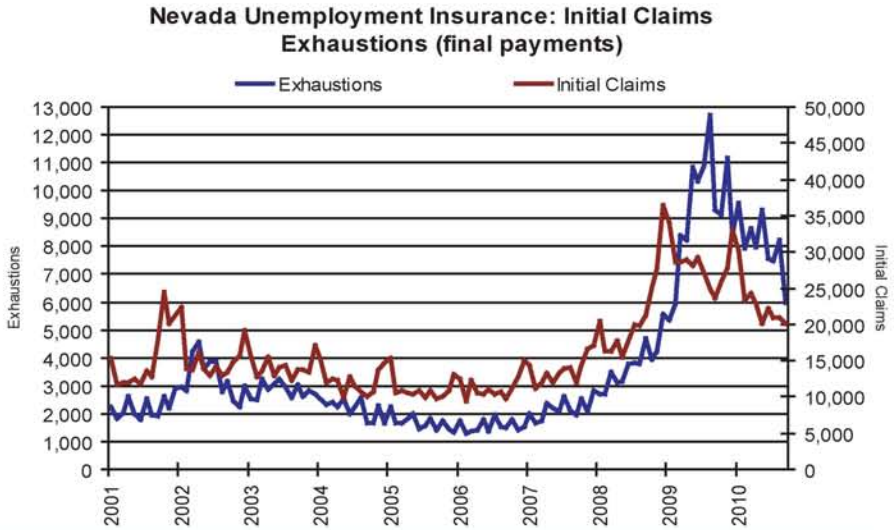
- Nevada's seasonally adjusted unemployment rate was 14.4 percent in September. Nevada has the highest unemployment rate in the nation. The next highest is Michigan with 13.0 percent.
- Nationally, the unemployment rate was unchanged at 9.6 percent in September. Nevada's jobless rate exceeded the national average by 4.8 percentage points.



- At 14.0 percent, the Statewide unadjusted unemployment rate is up 2.5 percentage points YTD from 2009 to 2010.
- The Las Vegas-Paradise MSA recorded an unemployment rate of 14.3 percent YTD through September, a 2.7 percentage point increase over-the-year.
- The Reno-Sparks MSA's jobless rate was 13.5 percent YTD through September. On an annual basis, the rate is up 2.0 percentage points over-the-year.
- The jobless rate in Carson City was 13.4 percent YTD in September, up 2.1 percentage points over-the-year.



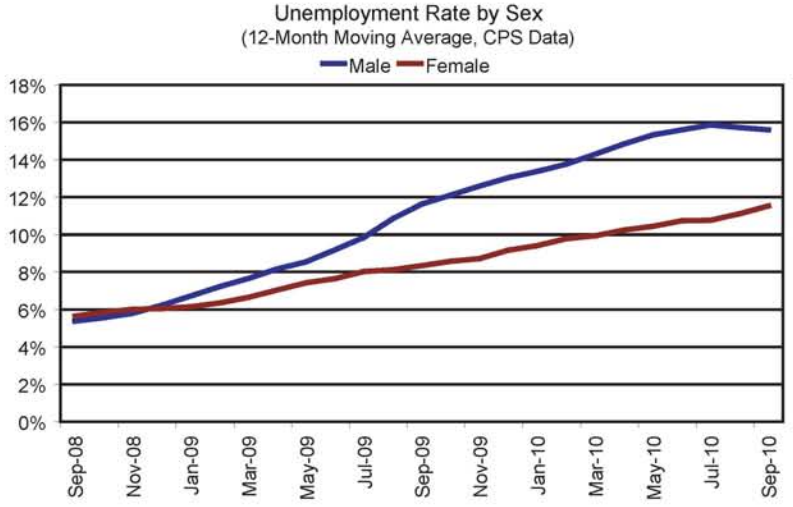
- Initial claims for unemployment insurance decreased in September from August by 766. Over-the-year, claims are down by 14.7 percent.
- Final payments, signifying an exhaustion of regular State benefits, decreased in September from August by 2,223. Over-the-year, final payments were down 35.7 percent.



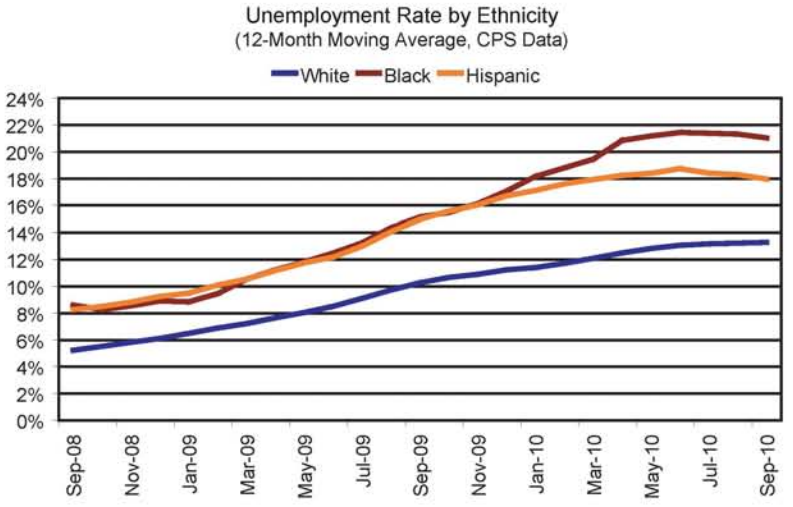
Trends at a Glance

Demographics of the Unemployed

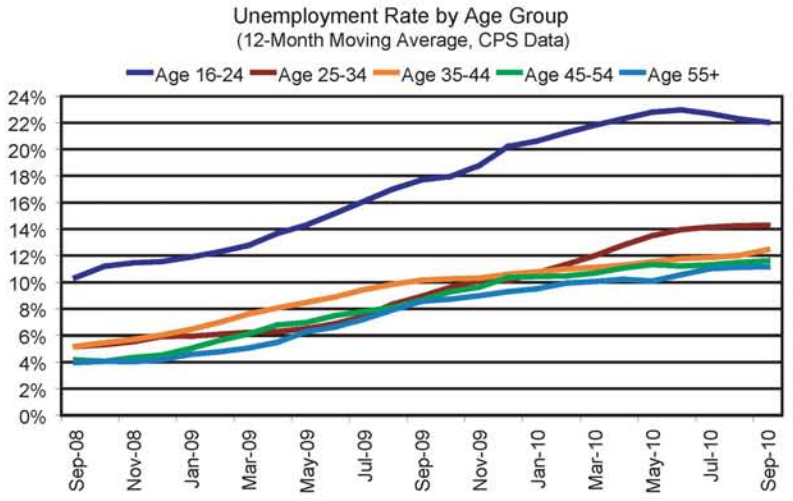
- The male unemployment rate decreased one-tenth of a percent to 15.6 percent.
- The female unemployment rate increased four-tenths of a percent to 11.5 percent.
- Traditionally male dominated industries, such as construction have lost the most jobs during the recession, while female dominated industries have fared better overall.



- The unemployment rate for Nevada's Hispanic labor force decreased three-tenths of a percent to 18.0 percent in September.
- The rate for Nevada's unemployed Black labor force decreased two-tenths of a percentage point to 21.0 percent.
- The unemployment rate for Nevada's White labor force increased one-tenth from August to 13.3 percent.



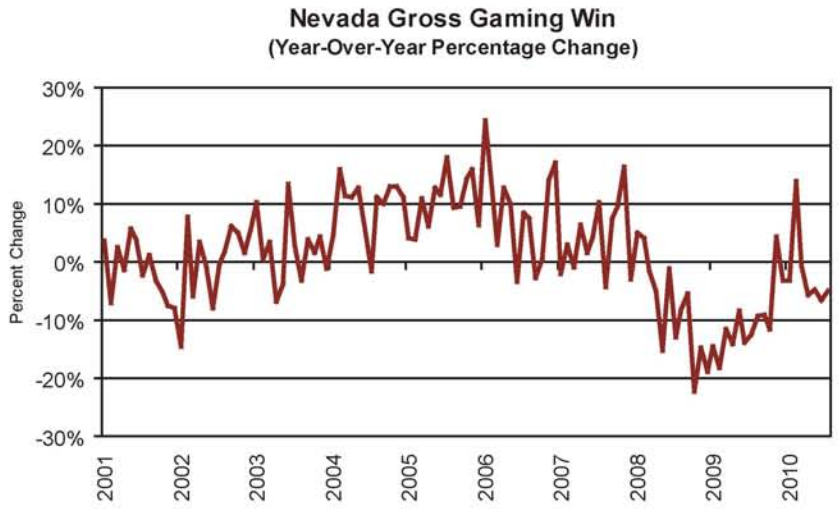
- At 22.0 percent, the unemployment rates for Nevada's youngest workers age 16-24 continued to trend higher than any other age group.
- The unemployment rate for workers age 25-34 remain unchanged from August at 14.3 percent.
- The unemployment rate for Nevada's oldest workers is 11.2 percent, up one-tenth from August.



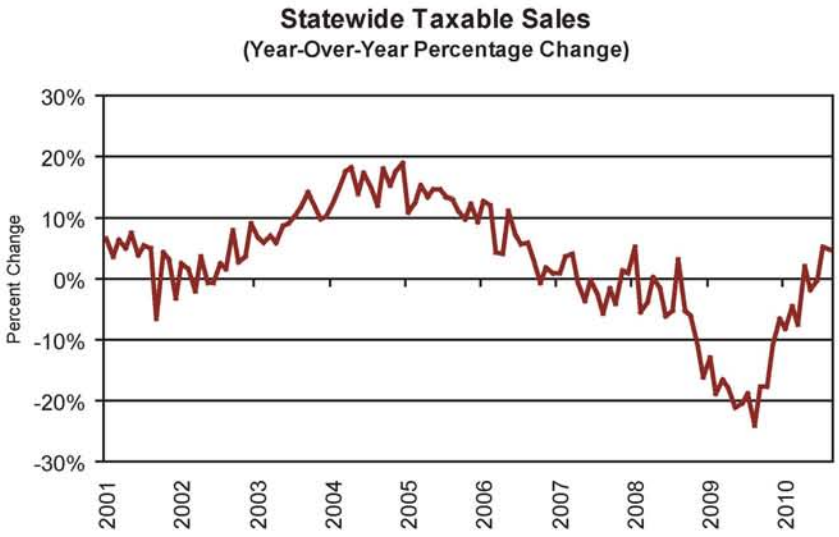
Trends at a Glance

Economic Indicators

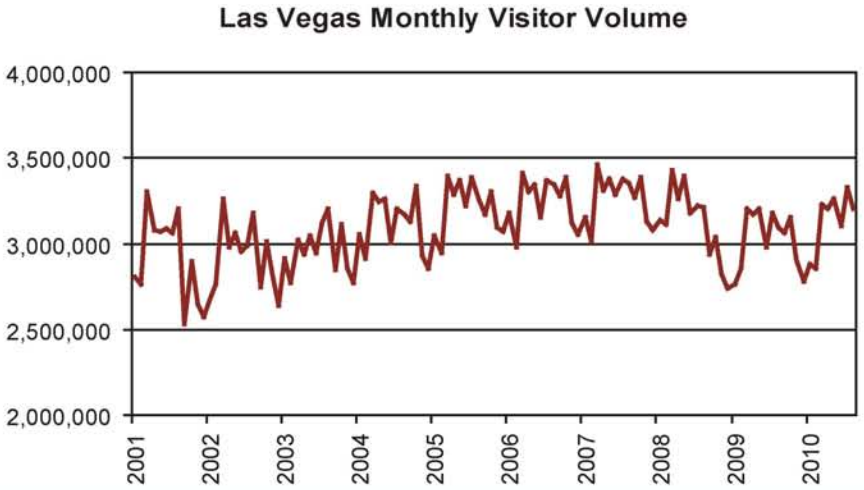
- Nevada gaming win was up 11.5 percent in August relative to the previous year.



- In August, taxable sales increased 4.8 percent over August 2009, with collections totalling $3,225,441,786.
- For the fiscal year-to-date, taxable sales are up 5.1 percent compared to the same period in 2009.



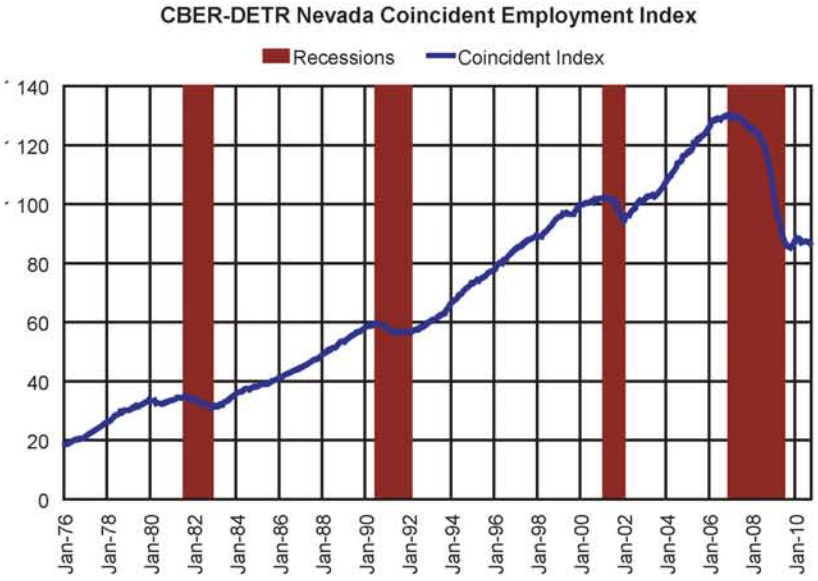
- Las Vegas visitor volume increased 109,259 in August relative to a year prior, a 3.5 percent increase. Year-to-date, visitor volume is up 2.5 percent in 2010 compared to a year earlier.



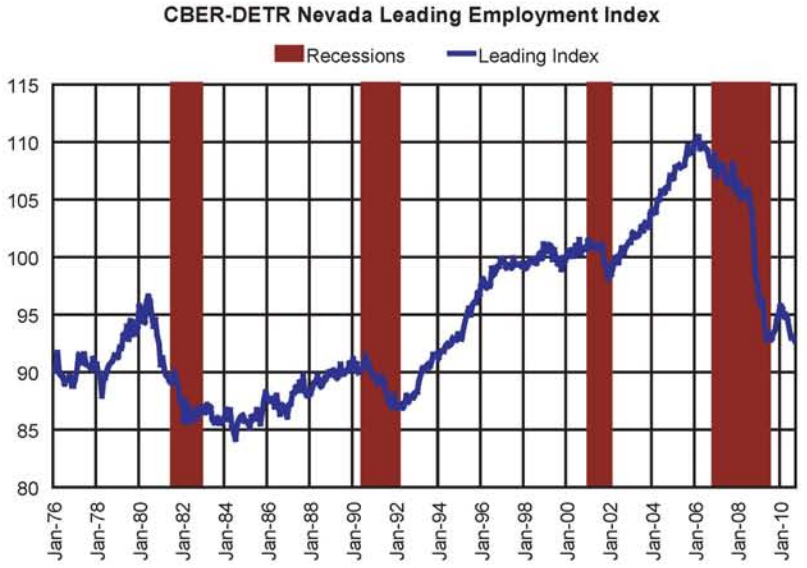
Trends at a Glance

CBER-DETR Nevada Coincident and Leading Employment Indices

- Although the National Bureau of Economic Research Business Cycle Dating Committee just called an end to the national recession in June 2009, the evidence that the current Nevada employment recession has ended gets shakier each month. Previous reports raised the question as to whether we saw a bottom to the coincident index. The chart still identifies that bottom tentatively as October 2009. But since reaching its most recent high value in January 2010, the coincident index fell each month through April. In the following months the index appears to have stabilized with minor increases and decreases from month-to-month.



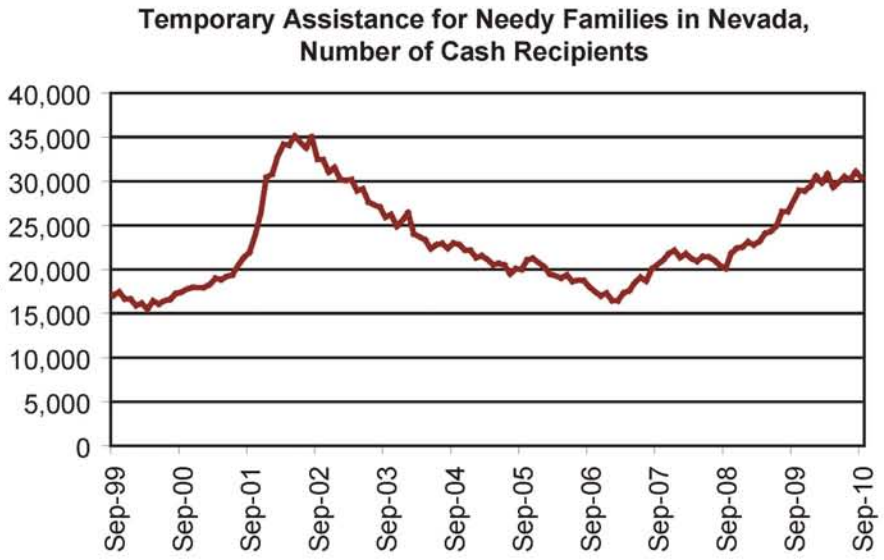
- The weakening of the national recovery does not bode well for the local economy. Although some signs of life appear in visitor volume, gaming revenue, and taxable sales, Nevada remains mired in its current employment recession. In September, the leading index reached a new local minimum, surpassing the low reached in October 2009. Based on seasonally adjusted data, household employment, nonfarm employment, and the unemployment rate moved in a negative direction while the insured unemployment rate moved in a positive direction. The same release shows that the components of the leading index experienced the following changes -- the real Moody's Baa bond rate moved in a positive direction. The remaining variables – initial claims for unemployment insurance, commercial permits, the short-duration unemployment rate, housing permits, and construction employment – moved in a negative direction.



Trends at a Glance

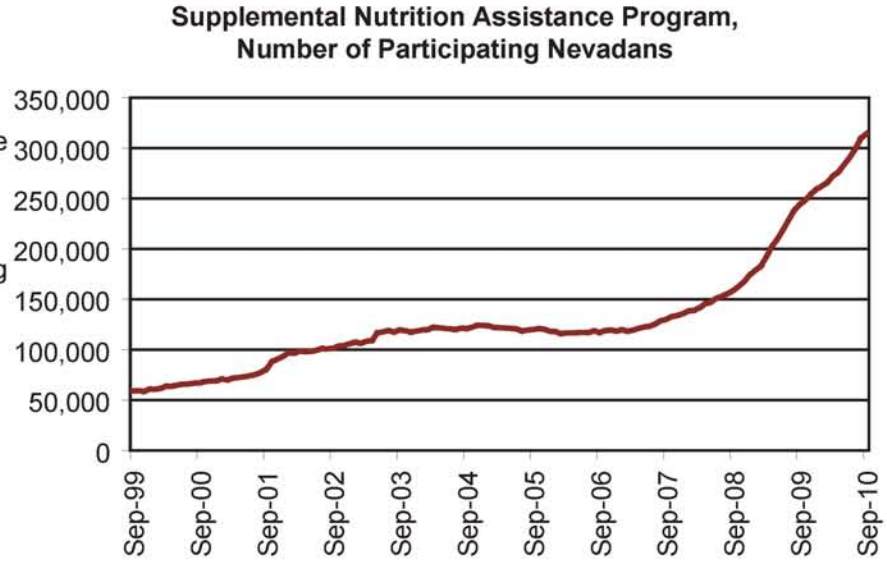
Welfare Indicators

- The Temporary Assistance for Needy Families (TANF) program provides time-limited cash assistance to low-income families with children so they can be cared for in their own home. TANF also seeks to reduce dependency by promoting job preparation, reduce out-of-wedlock pregnancies and encourage the formation and maintenance of two-parent families.
- As an economic indicator, TANF reveals information on the relative well-being of Nevada's low-income families. The number of recipients in the program is strongly influenced by the ups and downs of the business cycle. In September, 30,363 individuals were receiving assistance. Since September 2009, the level of assistance has increased 9.4 percent or 2,601 additional recipients.



Source: Nevada Department of Health and Human Services

- The Supplemental Nutrition Assistance Program (SNAP), formerly known as "food stamps", provides the means to increase food purchasing power to raise the nutritional level among low-income households and is the first line of defense against hunger for thousands of Nevadans.
- The number of Nevadans participating in SNAP has increased significantly in recent years, suggesting more and more families are struggling to make ends meet. In September, 314,253 Nevadans participated in the program, setting a new all-time high. Over-the-year, the number of participants receiving assistance has increased 28.7 percent.



Source: Nevada Department of Health and Human Services

Employment and Labor Force Summary

Nevada

Employment By Industry
(Estimates in Thousands)

	Sep10	Sep09	Aug10	Nominal Change Annual Sep09-Sep10	Nominal Change Monthly Aug10-Sep10	Nominal Change YTD 2009-2010	% Change Annual Sep09-Sep10	% Change Monthly Aug10-Sep10	% Change YTD 2009-2010
Total Nonfarm Employment	**1,110.9**	**1,134.6**	**1,108.0**	**-23.7**	**2.9**	**-38.4**	**-2.1%**	**0.3%**	**-3.3%**
Goods Producing Industries	**111.2**	**126.8**	**112.8**	**-15.6**	**-1.6**	**-22.8**	**-12.3%**	**-1.4%**	**-16.7%**
Natural Resources and Mining	**12.2**	**11.7**	**12.3**	**0.5**	**-0.1**	**0.0**	**4.3%**	**-0.8%**	**0.4%**
Construction	**60.4**	**76.0**	**61.9**	**-15.6**	**-1.5**	**-20.9**	**-20.5%**	**-2.4%**	**-24.9%**
Manufacturing	**38.6**	**39.1**	**38.6**	**-0.5**	**0.0**	**-1.8**	**-1.3%**	**0.0%**	**-4.5%**
Service Producing Industries	**999.7**	**1,007.8**	**995.2**	**-8.1**	**4.5**	**-15.7**	**-0.8%**	**0.5%**	**-1.5%**
Trade, Transportation & Utilities	**209.7**	**211.6**	**209.8**	**-1.9**	**-0.1**	**-5.2**	**-0.9%**	**0.0%**	**-2.5%**
Wholesale	35.8	34.2	35.6	1.6	0.2	0.1	4.7%	0.6%	0.3%
Retail	124.7	127.2	125.0	-2.5	-0.3	-3.5	-2.0%	-0.2%	-2.7%
Trans, Warehousing and Utilities	49.2	50.2	49.2	-1.0	0.0	-2.0	-2.0%	0.0%	-3.9%
Information	**12.1**	**12.8**	**12.3**	**-0.7**	**-0.2**	**-0.9**	**-5.5%**	**-1.6%**	**-7.1%**
Financial Activities	**52.5**	**54.3**	**52.7**	**-1.8**	**-0.2**	**-2.8**	**-3.3%**	**-0.4%**	**-5.0%**
Finance and Insurance	30.5	32.0	30.8	-1.5	-0.3	-1.8	-4.7%	-1.0%	-5.3%
Professional & Business Services	**135.7**	**133.6**	**135.3**	**2.1**	**0.4**	**0.9**	**1.6%**	**0.3%**	**0.7%**
Education & Health Services	**97.9**	**97.4**	**99.0**	**0.5**	**-1.1**	**2.5**	**0.5%**	**-1.1%**	**2.6%**
Health Care and Social Assistance	90.5	89.5	91.7	1.0	-1.2	2.6	1.1%	-1.3%	2.9%
Leisure & Hospitality	**303.0**	**306.7**	**304.6**	**-3.7**	**-1.6**	**-6.8**	**-1.2%**	**-0.5%**	**-2.2%**
Casino Hotels	172.1	175.1	172.2	-3.0	-0.1	-5.5	-1.7%	-0.1%	-3.1%
Food Services and Drinking Places	92.3	92.0	93.0	0.3	-0.7	-0.1	0.3%	-0.8%	-0.2%
Other Services	**35.3**	**34.1**	**35.5**	**1.2**	**-0.2**	**0.5**	**3.5%**	**-0.6%**	**1.3%**
Government	**153.5**	**157.3**	**146.0**	**-3.8**	**7.5**	**-3.8**	**-2.4%**	**5.1%**	**-2.4%**

Labor Force and Unemployment
(Estimates in Thousands)

	Sep10	Sep09	Aug10	Nominal Change Annual Sep09-Sep10	Nominal Change Monthly Aug10-Sep10	Nominal Change YTD 2009-2010	% Change Annual Sep09-Sep10	% Change Monthly Aug10-Sep10	% Change YTD 2009-2010
Total Labor Force	1,352.3	1,382.7	1,351.0	-30.4	1.3	-4.2	-2.2%	0.1%	-0.3%
Unemployment	196.2	180.7	192.3	15.5	3.9	33.7	8.6%	2.0%	21.3%
Unemployment Rate	14.5%	13.1%	14.2%	*	*	0.0	*	*	*
Unemployment Rate (SA)	***14.4%***	***12.7%***	***14.4%***	*	*		*	*	
Total Employment	1,156.1	1,202.0	1,158.7	-45.9	-2.6	-37.9	-3.8%	-0.2%	-3.1%

Size Class of Industries - First Quarter 2010
(Non-Government Worksites)

Size Class	Employees Per Worksite	Number of Worksites	Employment in Size Class	% of Total Employment
9	1000+	76	170,034	18.0%
8	500-999	105	71,201	7.5%
7	250-499	208	71,041	7.5%
6	100-249	884	122,908	13.0%
5	50-99	1,727	114,208	12.1%
4	20-49	5,140	149,831	15.8%
3	10-19	8,354	110,538	11.7%
2	5-9	11,499	77,936	8.2%
1	0-4	45,513	57853	6.1%
Total		73,506	945,550	100.0%

Largest Private Employers - March 2010

Employer	Employees	Industry
WYNN LAS VEGAS	8000 to 8499	Casino Hotels
BELLAGIO LLC	7500 to 7999	Casino Hotels
MGM GRAND HOTEL CASINO	7500 to 7999	Casino Hotels
ARIA RESORT & CASINO LLC	7000 to 7499	Casino Hotels
MANDALAY BAY RESORT AND CASINO	6000 to 6499	Casino Hotels
CAESARS PALACE	5000 to 5499	Casino Hotels
THE VENETIAN CASINO RESORT	4000 to 4499	Casino Hotels
THE MIRAGE CASINO-HOTEL	4000 to 4499	Casino Hotels
THE PALAZZO CASINO RESORT	3500 to 3999	Casino Hotels
FLAMINGO LAS VEGAS OPERATING	3000 to 3499	Casino Hotels
ENCORE LAS VEGAS	3000 to 3499	Casino Hotels
PARIS LAS VEGAS	3000 to 3499	Casino Hotels

Avg Wages By Industry - QCEW Data
First Quarter 2010

Industry	Avg. Weekly Wage
Total All Industries	$780
Natural Resources and Mining	$1,457
Construction	$1,001
Manufacturing	$881
Trade, Transportation & Utilities	$692
Information	$1,016
Financial Activities	$953
Professional & Business Services	$967
Education & Health Services	$859
Leisure & Hospitality	$543
Other Services	$580
Public Administration	$1,087
Unclassified	$1,042

Employment and Labor Force Summary

Las Vegas-Paradise

Employment By Industry
(Estimates in Thousands)

	Sep10	Sep09	Aug10	Nominal Change Annual Sep09-Sep10	Nominal Change Monthly Aug10-Sep10	Nominal Change YTD 2009-2010	% Change Annual Sep09-Sep10	% Change Monthly Aug10-Sep10	% Change YTD 2009-2010
Total Nonfarm Employment	**794.1**	**814.0**	**791.2**	**-19.9**	**2.9**	**-0.5**	**-2.4%**	**0.4%**	**-0.1%**
Goods Producing Industries	**66.3**	**80.3**	**67.2**	**-14.0**	**-0.9**	**-0.2**	**-17.4%**	**-1.3%**	**-0.3%**
Natural Resources and Mining	**0.3**	**0.3**	**0.3**	**0.0**	**0.0**	**-0.1**	**0.0%**	**0.0%**	**-30.4%**
Construction	**46.3**	**59.3**	**47.2**	**-13.0**	**-0.9**	**-0.3**	**-21.9%**	**-1.9%**	**-0.6%**
Manufacturing	**19.7**	**20.7**	**19.7**	**-1.0**	**0.0**	**0.1**	**-4.8%**	**0.0%**	**0.3%**
Service Producing Industries	**727.8**	**733.7**	**724.0**	**-5.9**	**3.8**	**-0.3**	**-0.8%**	**0.5%**	**0.0%**
Trade, Transportation & Utilities	**143.9**	**147.1**	**144.1**	**-3.2**	**-0.2**	**-1.7**	**-2.2%**	**-0.1%**	**-1.2%**
Wholesale	21.4	21.0	21.3	0.4	0.1	-0.1	1.9%	0.5%	-0.5%
Retail	88.6	91.5	88.9	-2.9	-0.3	-1.2	-3.2%	-0.3%	-1.4%
Trans, Warehousing and Utilities	33.9	34.6	33.9	-0.7	0.0	-0.4	-2.0%	0.0%	-1.1%
Information	**8.9**	**9.4**	**9.0**	**-0.5**	**-0.1**	**0.0**	**-5.3%**	**-1.1%**	**0.0%**
Financial Activities	**39.7**	**41.4**	**39.9**	**-1.7**	**-0.2**	**0.0**	**-4.1%**	**-0.5%**	**0.1%**
Finance and Insurance	22.5	23.9	22.8	-1.4	-0.3	0.2	-5.9%	-1.3%	0.8%
Professional & Business Services	**99.7**	**97.3**	**99.0**	**2.4**	**0.7**	**0.8**	**2.5%**	**0.7%**	**0.8%**
Education & Health Services	**67.3**	**67.7**	**68.1**	**-0.4**	**-0.8**	**0.5**	**-0.6%**	**-1.2%**	**0.7%**
Health Care and Social Assistance	62.1	61.8	63.1	0.3	-1.0	0.1	0.5%	-1.6%	0.2%
Leisure & Hospitality	**247.9**	**249.0**	**248.8**	**-1.1**	**-0.9**	**-1.3**	**-0.4%**	**-0.4%**	**-0.5%**
Casino Hotels	148.6	150.2	148.7	-1.6	-0.1	-0.4	-1.1%	-0.1%	-0.3%
Food Services and Drinking Places	72.9	72.2	73.4	0.7	-0.5	-0.5	1.0%	-0.7%	-0.7%
Other Services	**25.0**	**23.7**	**25.1**	**1.3**	**-0.1**	**-0.5**	**5.5%**	**-0.4%**	**-2.1%**
Government	**95.4**	**98.1**	**90.0**	**-2.7**	**5.4**	**1.9**	**-2.8%**	**6.0%**	**2.0%**

Labor Force and Unemployment
(Estimates in Thousands)

	Sep10	Sep09	Aug10	Nominal Change Annual Sep09-Sep10	Nominal Change Monthly Aug10-Sep10	Nominal Change YTD 2009-2010	% Change Annual Sep09-Sep10	% Change Monthly Aug10-Sep10	% Change YTD 2009-2010
Total Labor Force	970.8	987.7	968.7	-16.9	2.1	-2.1	-1.7%	0.2%	-0.2%
Unemployment	145.4	133.4	142.3	12.0	3.1	25.6	9.0%	2.2%	22.4%
Unemployment Rate	***15.0%***	***13.5%***	***14.7%***	*	*	0.0	*	*	
Total Employment	825.4	854.3	826.4	-28.9	-1.0	-27.8	-3.4%	-0.1%	-3.2%

Size Class of Industries - First Quarter 2010
(Non-Government Worksites)

Size Class	Employees Per Worksite	Number of Worksites	Employment in Size Class	% of Total Employment
9	1000+	58	145,263	20.8%
8	500-999	84	57,711	8.3%
7	250-499	146	51,129	7.3%
6	100-249	621	90,093	12.9%
5	50-99	1,231	84,694	12.1%
4	20-49	3,546	105,338	15.1%
3	10-19	5,482	74,181	10.6%
2	5-9	7,729	51,753	7.4%
1	0-4	29,518	36,949	5.3%
Total		48,415	697,111	100.0%

Largest Private Employers - March 2010

Employer	Employees	Industry
WYNN LAS VEGAS	8000 to 8499	Casino Hotels
BELLAGIO LLC	7500 to 7999	Casino Hotels
MGM GRAND HOTEL CASINO	7500 to 7999	Casino Hotels
ARIA RESORT & CASINO LLC	7000 to 7499	Casino Hotels
MANDALAY BAY RESORT AND CASINO	6000 to 6499	Casino Hotels
CAESARS PALACE	5000 to 5499	Casino Hotels
THE VENETIAN CASINO RESORT	4000 to 4499	Casino Hotels
THE MIRAGE CASINO-HOTEL	4000 to 4499	Casino Hotels
THE PALAZZO CASINO RESORT	3500 to 3999	Casino Hotels
FLAMINGO LAS VEGAS OPERATING	3000 to 3499	Casino Hotels
ENCORE LAS VEGAS	3000 to 3499	Casino Hotels
PARIS LAS VEGAS	3000 to 3499	Casino Hotels

Avg Wages By Industry - QCEW Data
First Quarter 2010

Industry	Avg. Weekly Wage
Total All Industries	$775
Natural Resources and Mining	$757
Construction	$1,045
Manufacturing	$872
Trade, Transportation & Utilities	$682
Information	$1,023
Financial Activities	$958
Professional & Business Services	$966
Education & Health Services	$872
Leisure & Hospitality	$573
Other Services	$570
Public Administration	$1,155
Unclassified	$951

Employment and Labor Force Summary

Reno-Sparks

Employment By Industry
(Estimates in Thousands)

	Sep10	Sep09	Aug10	Nominal Change Annual Sep09-Sep10	Nominal Change Monthly Aug10-Sep10	Nominal Change YTD 2009-2010	% Change Annual Sep09-Sep10	% Change Monthly Aug10-Sep10	% Change YTD 2009-2010
Total Nonfarm Employment	**187.1**	**194.1**	**187.0**	**-7.0**	**0.1**	**0.0**	**-3.6%**	**0.1%**	**0.0%**
Goods Producing Industries	**19.4**	**22.2**	**20.0**	**-2.8**	**-0.6**	**-0.2**	**-12.6%**	**-3.0%**	**-0.9%**
Natural Resources and Mining	**0.3**	**0.3**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0%**	**0.0%**	**0.0%**
Construction	**8.2**	**10.8**	**8.7**	**-2.6**	**-0.5**	**0.1**	**-24.1%**	**-5.7%**	**1.3%**
Manufacturing	**10.9**	**11.1**	**11.0**	**-0.2**	**-0.1**	**-0.3**	**-1.8%**	**-0.9%**	**-2.8%**
Service Producing Industries	**167.7**	**171.9**	**167.0**	**-4.2**	**0.7**	**0.2**	**-2.4%**	**0.4%**	**0.1%**
Trade, Transportation & Utilities	**42.6**	**43.4**	**42.7**	**-0.8**	**-0.1**	-0.4	**-1.8%**	**-0.2%**	-1.0%
Wholesale	9.5	9.3	9.6	0.2	-0.1	-0.1	2.2%	-1.0%	-1.1%
Retail	21.2	22.0	21.2	-0.8	0.0	-0.2	-3.6%	0.0%	-1.1%
Trans, Warehousing and Utilities	11.9	12.1	11.9	-0.2	0.0	-0.1	-1.7%	0.0%	-0.9%
Information	**2.3**	**2.4**	**2.3**	**-0.1**	**0.0**	**0.0**	**-4.2%**	**0.0%**	**-0.5%**
Financial Activities	**8.8**	**9.0**	**8.8**	**-0.2**	**0.0**	0.0	**-2.2%**	**0.0%**	0.4%
Finance and Insurance	5.5	5.6	5.5	-0.1	0.0	0.1	-1.8%	0.0%	1.1%
Professional & Business Services	**23.4**	**24.4**	**23.6**	**-1.0**	**-0.2**	**-0.1**	**-4.1%**	**-0.8%**	**-0.3%**
Education & Health Services	**21.9**	**21.5**	**22.1**	**0.4**	**-0.2**	**0.1**	**1.9%**	**-0.9%**	**0.4%**
Leisure & Hospitality	**33.2**	**34.9**	**33.5**	**-1.7**	**-0.3**	**-0.3**	**-4.9%**	**-0.9%**	**-1.0%**
Casino Hotels	14.8	15.4	14.9	-0.6	-0.1	-0.2	-3.9%	-0.7%	-1.1%
Food Services and Drinking Places	12.4	12.7	12.6	-0.3	-0.2	-0.1	-2.4%	-1.6%	-0.8%
Other Services	**7.1**	**7.0**	**7.2**	**0.1**	**-0.1**	**-0.2**	**1.4%**	**-1.4%**	**-2.5%**
Government	**28.4**	**29.3**	**26.8**	**-0.9**	**1.6**	**1.1**	**-3.1%**	**6.0%**	**3.9%**

Labor Force and Unemployment
(Estimates in Thousands)

	Sep10	Sep09	Aug10	Nominal Change Annual Sep09-Sep10	Nominal Change Monthly Aug10-Sep10	Nominal Change YTD 2009-2010	% Change Annual Sep09-Sep10	% Change Monthly Aug10-Sep10	% Change YTD 2009-2010
Total Labor Force	221.5	229.4	221.8	-7.9	-0.3	-1.1	-3.4%	-0.1%	-0.5%
Unemployment	30.1	28.4	29.6	1.7	0.5	4.4	6.0%	1.7%	17.0%
Unemployment Rate	***13.6%***	***12.4%***	***13.4%***	*	*	0.0	*	*	
Total Employment	191.4	201.0	192.2	-9.6	-0.8	-5.5	-4.8%	-0.4%	-2.7%

Size Class of Industries - First Quarter 2010
(Non-Government Worksites)

Size Class	Employees Per Worksite	Number of Worksites	Employment in Size Class	% of Total Employment
9	1000+	11	18,690	12.2%
8	500-999	8	5,043	3.3%
7	250-499	32	11,086	7.2%
6	100-249	147	21,625	14.1%
5	50-99	287	19,261	12.6%
4	20-49	954	27,956	18.3%
3	10-19	1,676	22,683	14.8%
2	5-9	2,289	15,162	9.9%
1	0-4	8,472	11,608	7.6%
Total		13,876	153,114	100.0%

Largest Private Employers - March 2010

Employer	Employees	Industry
RENOWN REGIONAL MEDICAL CENTER	2000 to 2499	Hospitals
PEPPERMILL HOTEL CASINO - RENO	2000 to 2499	Casino Hotels
INTERNATIONAL GAME TECHNOLOGY	2000 to 2499	Manufacturing
SILVER LEGACY RESORT CASINO	1500 to 1999	Casino Hotels
ST. MARYS	1500 to 1999	Hospitals
ATLANTIS CASINO RESORT	1500 to 1999	Casino Hotels
GRAND SIERRA RESORT AND CASINO	1500 to 1999	Casino Hotels
ELDORADO HOTEL & CASINO	1000 to 1499	Casino Hotels
CIRCUS CIRCUS CASINOS INC-RENO	1000 to 1499	Casino Hotels
SPARKS NUGGET INC.	1000 to 1499	Casino Hotels
UNITED PARCEL SERVICE	1000 to 1499	Couriers
HARRAH'S RENO	900 to 999	Casino Hotels
HIRE DYNAMICS LLC	600 to 699	Temp.Help Svcs

Avg Wages By Industry - QCEW Data
First Quarter 2010

Industry	Avg. Weekly Wage
Total All Industries	$768
Natural Resources and Mining	$2,212
Construction	$836
Manufacturing	$899
Trade, Transportation & Utilities	$695
Information	$1,009
Financial Activities	$1,008
Professional & Business Services	$917
Education & Health Services	$881
Leisure & Hospitality	$402
Other Services	$601
Public Administration	$1,086
Unclassified	$1,343

Employment and Labor Force Summary

Carson City

Employment By Industry
(Estimates in Thousands)

	Sep10	Sep09	Aug10	Nominal Change Annual Sep09-Sep10	Nominal Change Monthly Aug10-Sep10	Nominal Change YTD 2009-2010	% Change Annual Sep09-Sep10	% Change Monthly Aug10-Sep10	% Change YTD 2009-2010
Total Nonfarm Employment	**28.9**	**29.6**	**29.2**	**-0.7**	**-0.3**	**-0.1**	**-2.4%**	**-1.0%**	**-0.4%**
Goods Producing Industries	**3.4**	**3.8**	**3.5**	**-0.4**	**-0.1**	**-0.1**	**-10.5%**	**-2.9%**	**-2.2%**
Manufacturing	**2.4**	**2.5**	**2.4**	**-0.1**	**0.0**	**0.0**	**-4.0%**	**0.0%**	**-1.0%**
Service Producing Industries	**25.5**	**25.8**	**25.7**	**-0.3**	**-0.2**	**0.0**	**-1.2%**	**-0.8%**	**-0.2%**
Trade, Transportation & Utilities	**3.8**	**4.0**	**3.8**	**-0.2**	**0.0**	**0.0**	**-5.0%**	**0.0%**	**-0.7%**
Retail	2.8	3.0	2.9	-0.2	-0.1	0.0	-6.7%	-3.4%	0.4%
Professional & Business Services	**1.9**	**1.9**	**2.0**	**0.0**	**-0.1**	**0.0**	**0.0%**	**-5.0%**	**-1.3%**
Leisure & Hospitality	**3.4**	**3.5**	**3.4**	**-0.1**	**0.0**	**0.0**	**-2.9%**	**0.0%**	**-0.4%**
Government	**11.5**	**11.4**	**11.6**	**0.1**	**-0.1**	**0.0**	**0.9%**	**-0.9%**	**0.3%**

Labor Force and Unemployment
(Estimates in Thousands)

	Sep10	Sep09	Aug10	Nominal Change Annual Sep09-Sep10	Nominal Change Monthly Aug10-Sep10	Nominal Change YTD 2009-2010	% Change Annual Sep09-Sep10	% Change Monthly Aug10-Sep10	% Change YTD 2009-2010
Total Labor Force	28.5	29.5	28.7	-1.0	-0.2	-0.5	-3.4%	-0.7%	-1.6%
Unemployment	3.8	3.6	3.8	0.2	0.0	0.6	5.6%	0.0%	17.0%
Unemployment Rate	***13.4%***	***12.3%***	***13.1%***	*	*	0.0	*	*	
Total Employment	24.7	25.9	24.9	-1.2	-0.2	-1.0	-4.6%	-0.8%	-4.0%

Size Class of Industries - First Quarter 2010 (Non-Government Worksites)

Size Class	Employees Per Worksite	Number of Worksites	Employment in Size Class	% of Total Employment
9	1000+	0	0	0.0%
8	500-999	0	0	0.0%
7	250-499	4	1,388	8.3%
6	100-249	15	2,257	13.5%
5	50-99	33	2,304	13.7%
4	20-49	132	3,903	23.3%
3	10-19	209	2,766	16.5%
2	5-9	343	2,288	13.6%
1	0-4	1,288	1,870	11.1%
Total		2,024	16,776	100.0%

Largest Private Employers - March 2010

Employer	Employees	Industry
CHROMALLOY NEVADA	400 to 499	Manufacturing
WAL-MART SUPERCENTER	300 to 399	Retail
CASINO FANDANGO	300 to 399	Manufacturing
CARSON CITY NUGGET	200 to 299	Casinos
CLICK BOND INC	200 to 299	Manufacturing
GOLD DUST WEST CARSON CITY	200 to 299	Casinos
PCC STRUCTURALS CARSON CITY	100 to 199	Manufacturing
COSTCO WHOLESALE CORP	100 to 199	Retail

Avg Wages By Industry - QCEW Data First Quarter 2010

Industry	Avg. Weekly Wage
Total All Industries	$774
Natural Resources and Mining	*
Construction	$690
Manufacturing	$887
Trade, Transportation & Utilities	$660
Information	$936
Financial Activities	$791
Professional & Business Services	$725
Education & Health Services	$782
Leisure & Hospitality	$342
Other Services	$604
Public Administration	$1,002
Unclassified	$860

Macroeconomic Fundamentals

Employment

The nation's economy is moving sideways. Unemployment claims have climbed to January levels. Underemployment, those who dropped out of the labor market or are working part-time, has been increasing. Employers have enormous purchasing power in the labor market and they are offering workers only part-time positions. This phenomenon is stablizing the unemployment rate even though the private sector is not hiring enough to satisfy population growth. State and local governments are strapped with inadequate finances and labor force reductions are the consequence. The Fed appears poised to provide more quantitative easing but its effectiveness is uncertain. The existence of a liquidity trap, where corporations are flush with cash but unwilling to invest, is undeniable. Lack of growth in leading industry sectors, like finance and professional services, indicate the expected employment rebound is many quarters in the future. Overcapacity in housing, industrial and commercial structures will inhibit the historical growth engine of development and construction from boosting the economy and employment anytime soon.

Consumption & Income

Personal savings are hovering near 6%, marking a fundamental paradigm shift from the borrowing and spending lifestyles of previous decades. Incomes are currently propped up with government transfer payments. Spending is lately being directed toward higher energy costs. When unemployment insurance benefits were reinstated, they were immediately spent in the third quarter to catch up with overdue bills. Surveys indicate that wages and salaries are rising modestly but do not include the unemployed and are skewed toward managers and other high-income earners. The average consumer is losing income. This picture will persist until the private sector once again drives economic activity. Because overcapacity will persist through this year and into 2011, we cannot expect consumer income growth to help fuel the recovery.

Manufacturing

The inventory correction is behind us and manufacturing activity is proceeding at the expected pace reflective of a deep recession. Record low interest rates are allowing capital investment by manufacturing firms. This should create an industry sector poised to rebound when overcapacity is sufficiently purged from the system. However, businesses will not hire because capital improvements provide labor savings that translate into bottom line profits. Exports, which had been a bright spot, have now slowed due to the success of low cost production facilities in more favorable overseas locations. Aerospace is one subsector with healthy demand if not robust growth. Mining and agriculture equipment manufacturing is holding firm due to investment from industrializing nations, particularly China. Significant growth in this sector remains ellusive.

Commodities

Copper prices are reacting to dollar valuations and market shortages. Demand from China appears to be underpinning the market while currency fluctuations are affecting prices only on the margins. Demand from growing countries like India and China is driving production of base metals around the world. Fear of inflation is pushing gold prices into record territory. Fed action affecting hundreds of billions of dollars on its balance sheet is one reason behind the rise in gold value. Fed quantitative easing practices will be a driver in world gold prices while the economy teeters. Another interesting yet understandable quirk is gold bullion purchases by the ultra wealthy. Wealth hedging is spurring bullion purchasing, thus funding the precious metals storage industry. Also fueling the run-up in commodities is the suspected bond bubble and uncertainty over equities valuations. With the industrializing world expanding, raw materials were an opportunity to create some market momentum and retail purchasers were willing to oblige. Regardless of the forces, metal producing entities are benefiting enormously from increasing prices.

Currencies

A global debate is evolving between established industrial nations and emerging economies. Currency valuations are under scrutiny as emerging economies benefit from selling cheaper goods even while middle class consumers in the developed world see shrinking incomes. The industrial world remains mired in recession because production facilities continue to relocate to countries with favorable currency exchange rates. The industrial world contends that the currencies are unfairly manipulated by emerging market governments. The growing economic influence of industrializing nations can not be discounted. Emerging Asian and Latin American countries have weathered the recession much better than the US, Europe and Japan. The argument from America is that unrestrained Chinese growth creates a massive asset bubble. Allowing their currency to float would diffuse the overheating development while reducing unemployment in the US.

Macroeconomic Fundamentals

Outlook

Based on past business cycle behavior, the expected expansion should materialize by mid-to-late 2011. Experiences from the Great Depression may provide some insight on the current recovery. Massive demand side stimulus through war production or other government investment is absent this time around. Additionally, China's hyper-economic engine introduces an unprecedented variable in the existing equation. Domestic production is facing significant headwinds from low-wage overseas operations and an unfavorable currency regime. Current domestic overcapacity is endemic and equilibrium pricing has not yet been established. In summary, expectations are weak economic and employment growth for the foreseeable future.

Industry Profile

Leisure and Hospitality

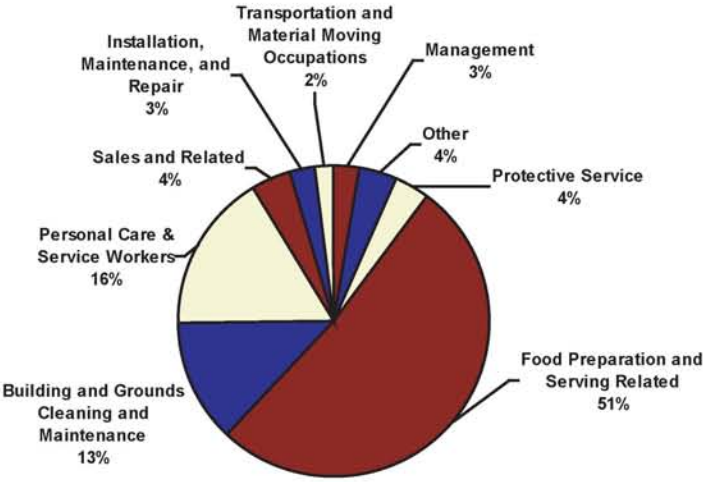
The leisure and hospitality sector includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, recreational, lodging and food service needs. This sector includes employers involved in producing, promoting, or participating in live performances events or exhibits. It also includes purveyors of gaming establishment, hotel casinos and bars and restaurants. In Nevada, the leisure and hospitality industry is an extremely important sector of the State's economy. In fact, the sector is by far the largest, making up over 27 percent of the industry base. As of September 2010, there were 302,500 Nevadans employed in leisure and hospitality.

It is no surprise that there is a somewhat narrow spectrum of occupations within this industry; with over half being defined as food preparation and serving related jobs. Other large occupational sub-groups include, buildings and grounds, cleaning and maintence, personal care and service workers.

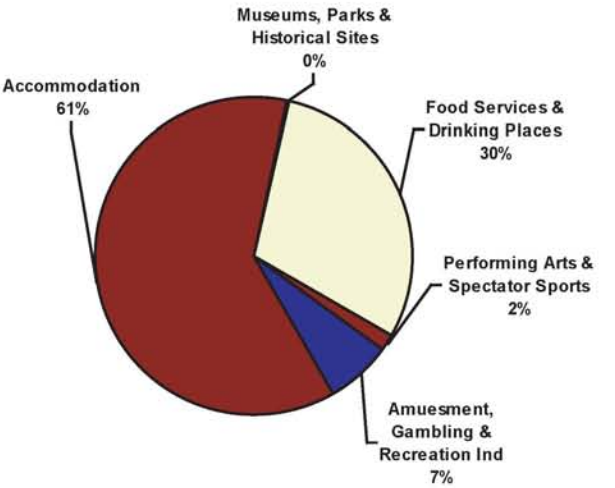
The leisure and hospitality industry in Nevada is dominated by two primary industries: accommodation, and food and beverage operations. At 61 percent, accommodation makes up the largest portion of the leisure and hospitality industry. These establishments consist of Nevada's most well-known employers including world renowned mega resort operators located on the Las Vegas strip. Employment in the accommodation industry totaled 185,300 workers year-to date through September 2010. Food service and drinking places make up 30 percent of employment in the leisure and hospitality sector with employment running at about 91,800 in 2010 year-to-date.

Leisure and hospitality employment grew phenominally in the years leading up to the recession. From 2002 through 2007, employment in the industry increased by 41,000 or 14 percent. Once the recession started though, employment dropped significantly. The leisure and hospitality industry was particularly hard

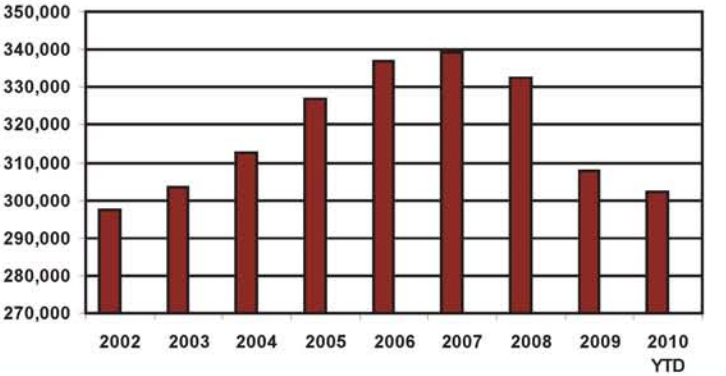
Occupational Distribution



Employment by Establishment Type



Leisure & Hospitality Employment, Average Annual



Industry Profile

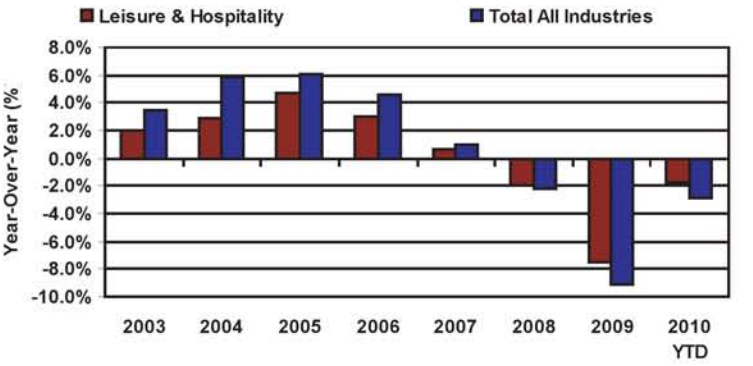
Leisure and Hospitality

income. Not only did the level of visitors fall, but the dollars spent by each visitor fell as well. Compared to growth across all industries, leisure and hospitality has remained relatively stable on a annual percentage basis. During 2009 and the first two quarters of 2010, average employment dropped less than the total of all industries and appears to be reaching an employment bottom sooner than the economy as a whole. The net job flow at the Statewide level began trending down in first quarter 2007 as the recession took hold of the economy. The dramatic losses follow a similar trend in Washoe County, Clark County and Carson City, which comprise 94 percent of leisure and hospitality jobs in Nevada.

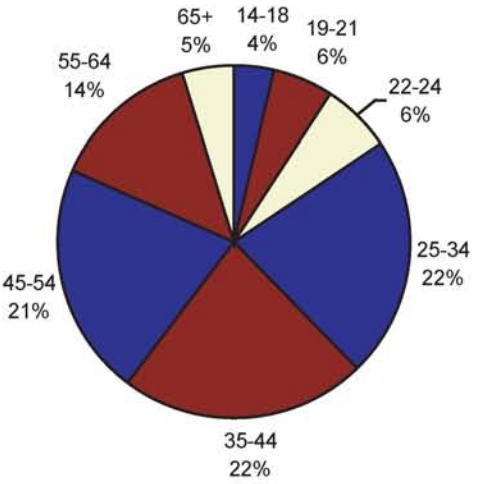
Demographically, leisure and hospitality workers are a diverse group based on gender and age. Men and women each comprise 50 percent of the employment base in the industry. Across all industries the ratio is roughly 52 percent men to 48 percent female. By age, workers are concenrated equally in the predominate working age groups, ages 25-34, 35-44 and 45-54. Each group comprises about 22 percent of all workers in the leisure and hospitality industry.

The leisure and hospitality industry has traditionally paid lower wages than the economy as a whole in Nevada. From 2002 to 2009, leisure and hospitality jobs paid $198 less per week on average than other industries, and the discrepancy has grown over the time period. In 2009, leisure and hospitality paid $562 per week compared to $791 across all industries, a difference of 29 percent. On a percentage basis, leisure and hospitality wages grew similar to wages across all industries though less over all. From 2002 to 2009, the average weekly wage in leisure and hospitality grew by 18.6 percent ($88), while total average weekly wages grew by 24.6 percent or $156. The recession has significantly impacted wages paid to employees. After peaking in 2007 at $578 per week, wages have fallen by $16 per week. Across all industries, wages fell by $13 since peaking in 2008.

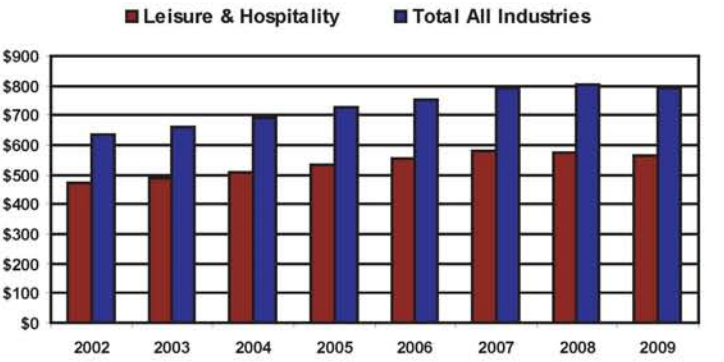
Employment Growth: Leisure & Hospitality vs. Total Employment Across All industries



Leisure and Hospitality Employment by Age (Third Quarter 2009)



Average Weekly Wage: Leisure & Hospitality vs. Total All Industries



Industry Profile

Leisure and Hospitality

In all, there were 6,493 leisure and hospitality worksites in Nevada in the first quarter of 2010. The number of worksites increased over-the-year by 62 or 1.0 percent, but employment fell by 1,967. All size classes increased, except for worksites with 1 to 4, 20 to 49 and 100 to 249 workers. Worksites with 5 to 9 employees increased by 77 and added 574 workers. Employers with 50 to 99 employees added 11 worksites and 732 workers. The hardest hit were worksites with 100 to 249 and 500 or more workers, they lost 1,650 and 1,399 workers, respectively, but only 8 worksites.

Employers in the casino hotel industry dominate the list of top employers in the leisure and hospitality sector. Wynn Las Vegas, with employment in the 8,000 to 8,499 range is the largest single employer in the casino hotel industry as well as the largest private employer in the State. Other top employers include Bellagio, MGM Grand and recent newcomer, Aria. Each of the top ten casino hotels employs 3,000 or more workers.

Future leisure and hospitality employment growth depends largely on the health of the broader economy in the nation and Nevada. Leisure and hospitality has suffered in the recession with large job losses brought on by declines in tourism and consumer sentiment. With no new major strip developments on the horizon, the leisure and hospitality sector will continue to contract in the near term. Year-over-year employment growth should turn positive in the third quarter of 2011, though growth expectations for the foreseeable future will remain muted at best. A return to growth similar to prerecession levels is highly unlikely.

Department of Employment, Training and Rehabilitation
Research and Analysis Bureau

Leisure & Hospitality Businesses Grouped by Size

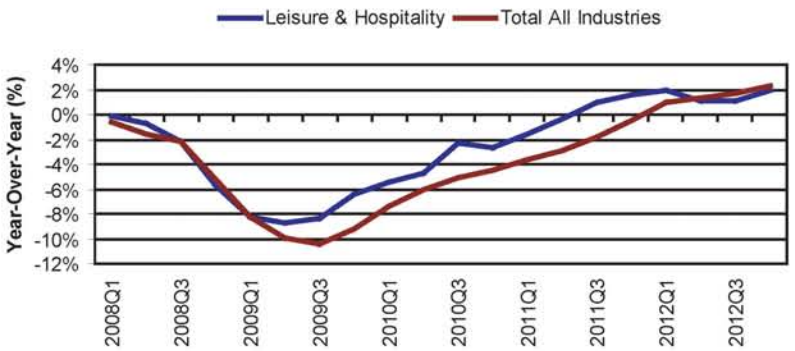
	Worksites 2010 Q1	Worksites 2009 Q1	Change	%Change
Total	6,493	6,431	-62	-1.0%
1 to 4 Employees	1,562	1,581	19	1.2%
5 to 9 Employees	1,412	1,335	77	5.8%
10 to 19 Employees	1,564	1,553	11	0.7%
20 to 49 Employees	1,265	1,278	-13	-1.0%
50 to 99 Employees	380	369	11	3.0%
100 to 249 Employees	162	170	-8	-4.7%
250 to 499 Employees	49	46	3	6.5%
500 or more Employees	99	99	0	0.0%

	Employment 2010 Q1	Employment 2009 Q1	Change	%Change
Total	307,419	309,386	-1,967	-0.6%
1 to 4 Employees	3,664	3,676	-12	-0.3%
5 to 9 Employees	9,668	9,094	574	6.3%
10 to 19 Employees	21,743	21,724	19	0.1%
20 to 49 Employees	36,937	37,429	-492	-1.3%
50 to 99 Employees	25,712	24,980	732	2.9%
100 to 249 Employees	23,301	24,951	-1,650	-6.6%
250 to 499 Employees	16,215	15,954	261	1.6%
500 or more Employees	170,179	171,578	-1,399	-0.8%

Top Ten Employers by Worksite (First Quarter 2010)

Employer	County	Industry	Employment
Wynn Las Vegas	Clark	Casino Hotels	8000 to 8499
Bellagio	Clark	Casino Hotels	7500 to 7999
MGM Grand Casino and Hotel	Clark	Casino Hotels	7500 to 7999
Aria Resort and Casino	Clark	Casino Hotels	7000 to 7499
Mandalay Resort and Casino	Clark	Casino Hotels	6000 to 6499
Caesar's Palace	Clark	Casino Hotels	5000 to 5499
Venetian Casino Resort	Clark	Casino Hotels	4000 to 4499
Mirage Casino Hotel	Clark	Casino Hotels	4000 to 4499
Palazzo Casino Resort	Clark	Casino Hotels	3500 to 3999
Flamingo Las Vegas	Clark	Casino Hotels	3000 to 3499

Employment Projections: Leisure & Hospitality Vs. Total All Industries



State of Nevada
Department of Employment, Training & Rehabilitation
Research & Analysis Bureau
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ECONOMY IN BRIEF

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August 2010

NEVADA'S PREMIER SOURCE OF WORKFORCE & ECONOMIC INFORMATION AND ANALYSIS

Economic Summary

The hot summer days of August did little to stimulate Nevada's economic fortunes. Readings of key labor market indicators continue to show moderating losses. For the second month in a row, the unemployment rate ticked up by a mere one-tenth to 14.4 percent, representing 192,300 workers. Over 10,000 workers left the labor force either to seek employment out of state or became too discouraged to look for work. Total non-farm employment fell by 700 overall, but private employers added 2,300 jobs to offset an expected reduction in the public sector. Employment is down just 1.8 percent from August 2009 -- a far cry from the 10.6 percent decline Nevada's employment based experienced just a year ago. Despite moderating losses, a weak economic outlook will constrain any serious labor market improvement for the foreseeable future.

In total, there was a loss of 3,000 public sector jobs. The 2010 Census began to wind down, bringing an end to employment for roughly 1,900 workers, while local governments shed 1,000 jobs, brought on by continued budget cuts. The construction industry added 700 jobs; most were in road improvement projects. Employers in the professional and business services sector added 500 jobs. In the leisure and hospitality industry, food and beverage services and accommodation added 700 jobs to offset a loss of 700 in casino hotels and gaming. Since January, employment in leisure and hospitality is up by 7,600, but the increase is largely due to seasonal improvement. Based on seasonally adjusted data, employment is actually down by 1,300, meaning this year's seasonal increase is less than normal. Retail and wholesale trade continued to show modest improvement, reaching a high of 160,800 for the year, an increase of 3,700 since January.

Unemployment Rate by County

Fortunes varied by region in August. In the Las Vegas area, employers shed 1,500 jobs from July to August. Similar to the State as a whole, public employment losses surmounted improvement in the private sector. In all, governments in the area shed 2,700 jobs. Those losses were partially offset by small improvements in a variety of industries, most notably construction and education and health services. Employers in the Reno area added 700 jobs overall. Unlike Las Vegas, government remained essentially flat, adding 200 jobs, while the private sector expanded by 500. Expanding industries included construction with 200 jobs, and professional and business services with an additional 200. Carson City held steady at 29,100 jobs for the third straight month. Over-the-year, employment is down 700 or 2.3 percent.

At 14.4 percent, Nevada has the highest unemployment rate in the nation in August for the fourth consecutive month.

Economic Indicators

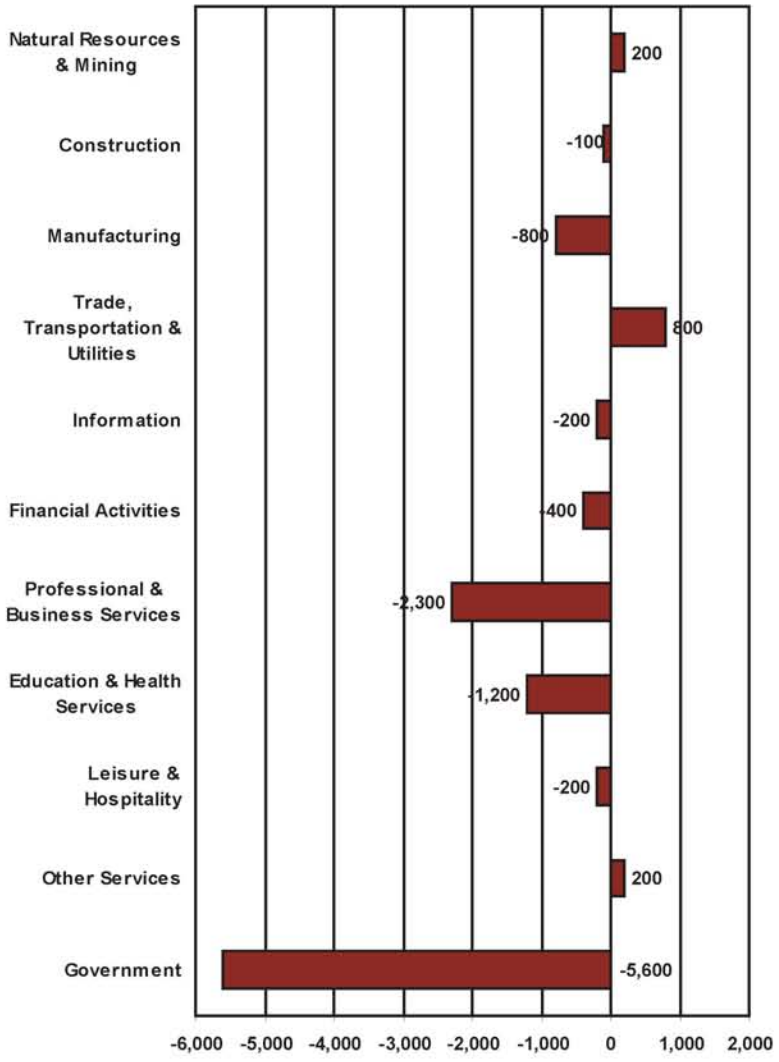
UNEMPLOYMENT RATES	Aug 2010
NEVADA *	14.4%
LAS VEGAS-PARADISE MSA	14.7%
RENO-SPARKS MSA	13.3%
CARSON CITY MSA	13.1%
ELKO MICROPOLITAN AREA	7.7%
UNITED STATES *	9.6%
CALIFORNIA *	12.4%
* Seasonally Adjusted	
JOB GROWTH (Y-O-Y)	
NEVADA	0.2%
LAS VEGAS-PARADISE MSA	-2.0%
RENO-SPARKS MSA	-3.5%
CARSON CITY MSA	-2.3%
UNITED STATES	0.0%
CALIFORNIA	-0.9%
CONSUMER PRICE INDEX (Y-O-Y)	
UNITED STATES	1.1%
GAMING WIN (Y-O-Y)	
JUL 2009 - JUL 2010	
NEVADA	-4.9%
CLARK COUNTY	-5.0%
WASHOE COUNTY	-2.1%
TAXABLE SALES (Y-O-Y)	
JUN 2009 - JUN 2010	
NEVADA	-0.3%
CLARK COUNTY	-1.0%
WASHOE COUNTY	0.3%

Economic Summary

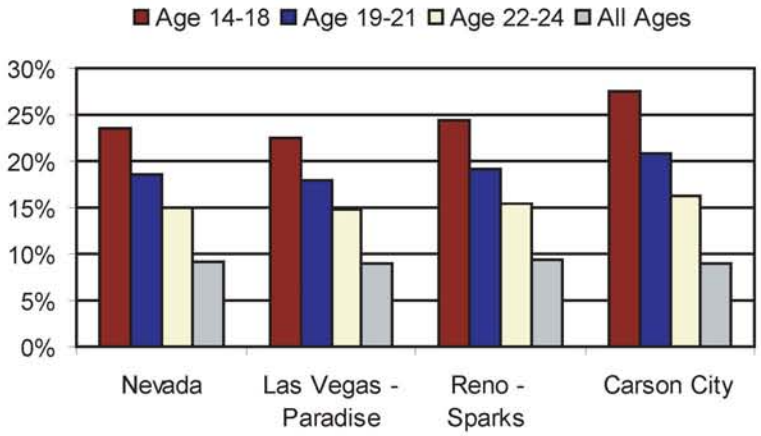
Seasonal improvement in the Las Vegas-Paradise metropolitan area pushed the unemployment rate down one-tenth to 14.7 percent. In the Reno-Sparks area, the unemployment rate declined three-tenths of a percentage point to 13.3 percent. In Carson City, the unemployment rate fell one-tenth to 13.1 percent in August. In the Elko region of the State, the unemployment rate dropped by three-tenths of percentage point to 7.7 percent. (Unemployment rates for the State's metropolitan areas are not adjusted for seasonality. For comparison purposes, the State's unadjusted unemployment rate was 14.2 percent in August, down from 14.4 percent in July.) Despite seasonal improvements, unemployment rates are up in all areas of the State from a year earlier.

As noted in previous editions, the unemployment rate for younger workers is significantly higher than other age groups – nearly twice as high in recently reported figures. The causes for higher rates of joblessness among young workers are many, but generally include weak labor market attachment and increased competition from more experienced workers. Weak labor market attachment results in high turnover, which is not really unexpected, as young workers tend to move from job-to-job in search of better opportunities. The Local Employment Dynamics (LED) program, a cooperative data sharing agreement between the U.S. Census Bureau and State workforce agencies provides a measure of turnover by age and metropolitan area. The turnover rate allows for comparisons between different age groups within the labor force. A review of the statistics reveals that indeed younger workers have higher turnover in Nevada. Turnover rates for workers age 14-24 range from 15 to 27 percent, while the turnover rate for all workers runs about nine percent from quarter-to-quarter. The notion of higher turnover rates for younger workers holds up

August Over-the-Month Employment Change



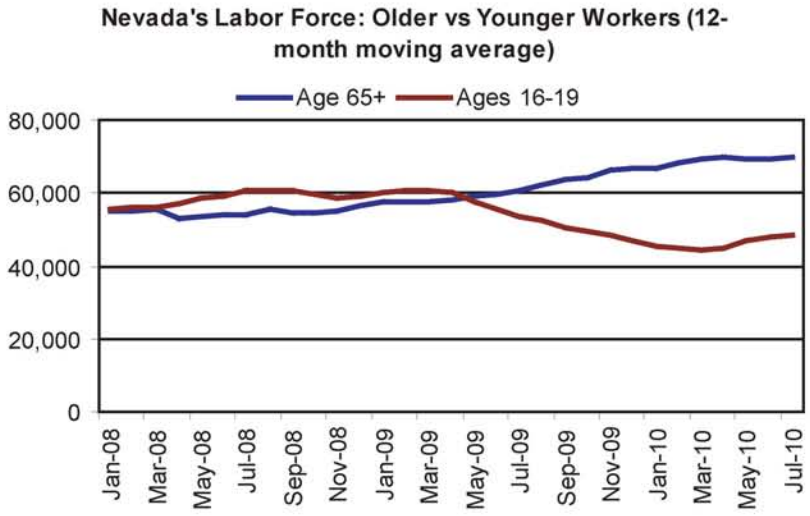
Turnover Rate by Age and Location

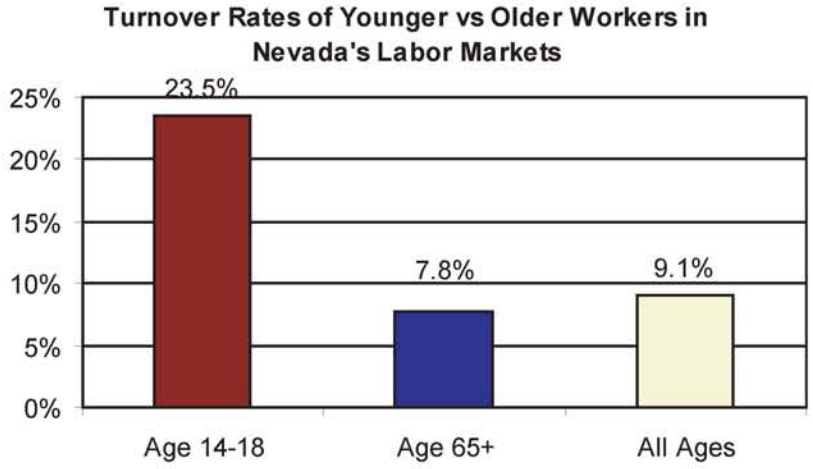


Economic Summary

across the State's regional economies, as well. Of the State's metropolitan areas, Carson City has the highest turnover rate for teenage workers at 27 percent; followed by Reno-Sparks with 24 percent; and Las Vegas-Paradise at 22 percent.

Another factor affecting the unemployment rate for the State's youngest workers is increased competition from the oldest workers. Older workers are entering the labor force due to recessionary factors, as well as the fact that their numbers have increased. The "graying" of the Baby Boom generation accounts for a growing population of workers age 65 and older. The recession has devastated household wealth in Nevada, including the retirement accounts of older workers, pushing many of them back into the labor force or making them work longer than expected. Many of these workers are competing for jobs traditionally filled by younger workers. A significant shift occurred recently as a result of the recession. In May 2009, the number of workers age 65 and older surpassed the number of workers age 16-19 in Nevada's labor force. As the recession unfolded, a divergence developed, where significantly more older workers entered the labor force, while younger workers dropped out. From January 2008, the number of older workers increased from about 55,000 to almost 70,000, while the number of younger workers fell from roughly 56,000 to around 48,000. As of August, there were roughly 22,000 more workers 65 or older than teenage workers in the labor force.





Not only are there more older workers competing for a limited amount of jobs, these workers bring many favorable attributes to the labor market, including a lifetime of work experience, a strong work ethic and a strong degree of loyalty. With the high cost of recruitment and training, it's no surprise employers are hiring and keeping older workers. A review of LED turnover rates bares this out. The turnover rate for workers age 65 or older is just 7.8 percent, compared to 9.1 for all workers and 23.5 percent for teen workers. Given shifts in the distribution of Nevada's population and expectations for future job growth, older workers will continue to crowd out younger workers for some time.

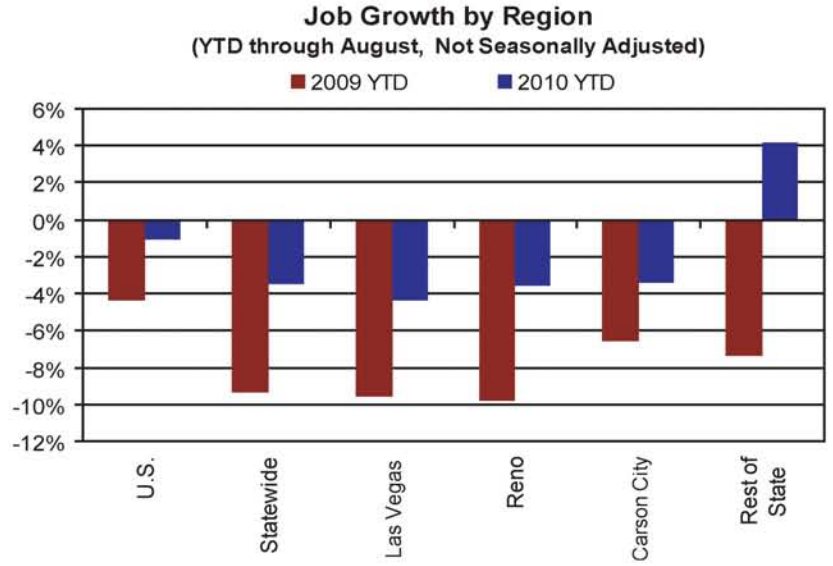
Jered McDonald
Economist
Research and Analysis Bureau

Trends at a Glance

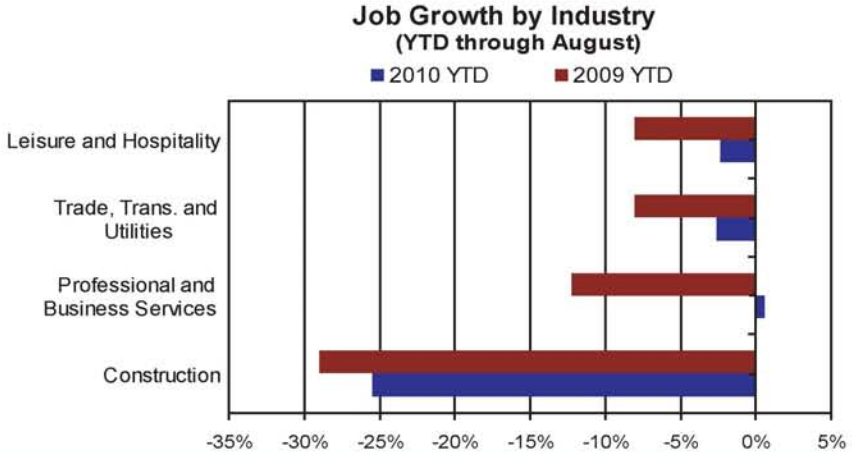
Industrial Employment

- Industrial employment in Nevada fell 1.8 percent in August relative to a year prior, equating to a loss of 19,800 jobs.
- August job readings were up 0.2 percent nationally relative to August 2009.

- The year-to-date annual growth rates remain higher than a year ago throughout all regions of the State.
- The Las Vegas MSA's job count fell 4.4 percent YTD in August relative to August 2009.
- In the Reno MSA, YTD job readings were down 3.6 percent in August 2010.
- In Carson City, employment fell 3.4 percent YTD from August 2009 to August 2010.
- Job growth was up 4.2 percent in non-metro areas of the State.



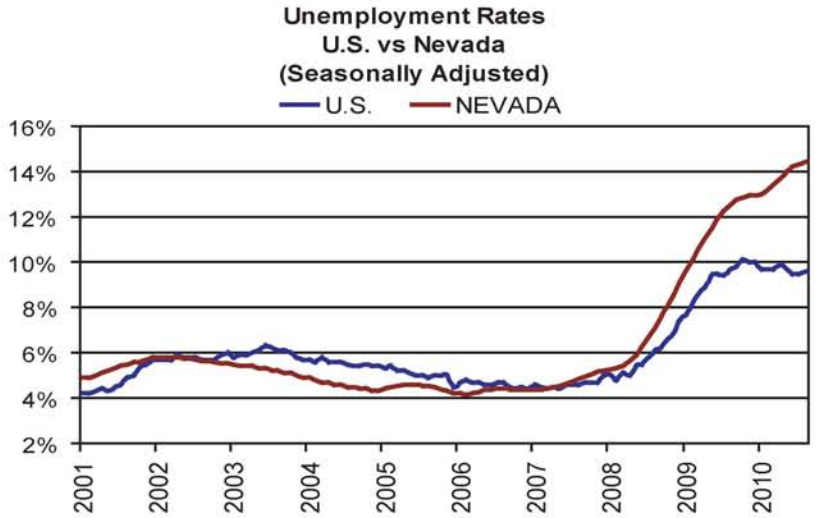
- Approximately 21,650 jobs have been lost in the construction industry YTD through August, a 25.4 percent annual decline, though the decline continued to slow for the fourth consecutive month. The YTD annual growth rate is higher relative to a year prior.
- Job losses in the State's largest industry, leisure and hospitality, continue to moderate. Industry employment was down 2.3 percent YTD through August relative to a year prior. A year earlier, job losses were down 8.1 percent over the same time frame.
- With the relative improvement of the past few months, professional and business services marked a positive figure at 0.6 percent YTD through August.



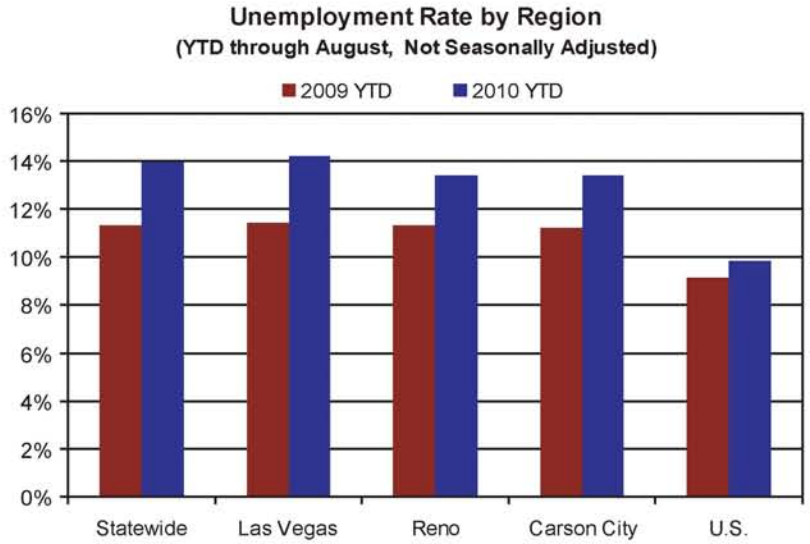
Trends at a Glance

Unemployment

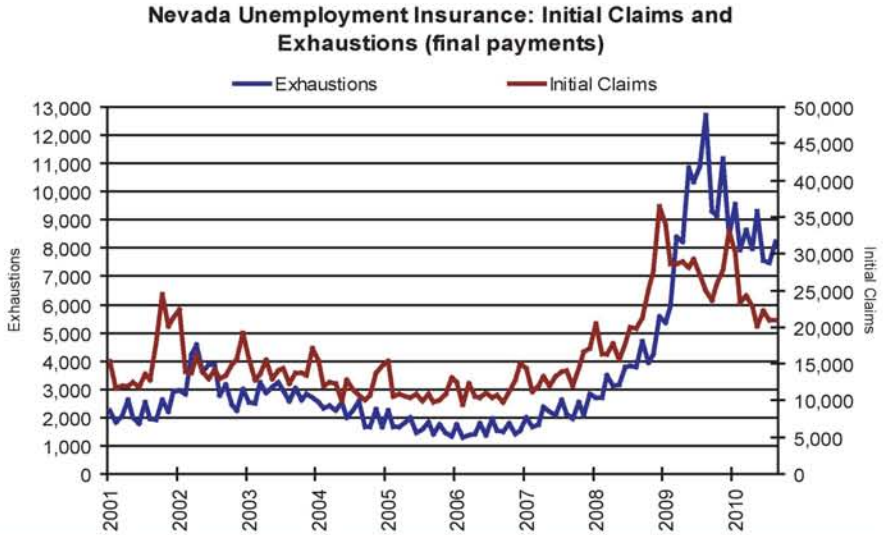
- Nevada's seasonally adjusted unemployment rate was 14.4 percent in August. Nevada has the highest unemployment rate in the nation. The next highest is Michigan with 13.1 percent.
- Nationally, the unemployment rate was unchanged at 9.6 percent in August. Nevada's jobless rate exceeded the national average by 4.8 percentage points.



- At 14.0 percent, the Statewide unadjusted unemployment rate is up 2.6 percentage points YTD from 2009 to 2010.
- The Las Vegas-Paradise MSA recorded an unemployment rate of 14.2 percent YTD through August, a 2.8 percentage point increase over-the-year.
- The Reno-Sparks MSA's jobless rate was 13.4 percent YTD through August. On an annual basis, the rate is up 2.1 percentage points over-the-year.
- The jobless rate in Carson City was 13.4 percent YTD in August, up 2.2 percentage points over-the-year.



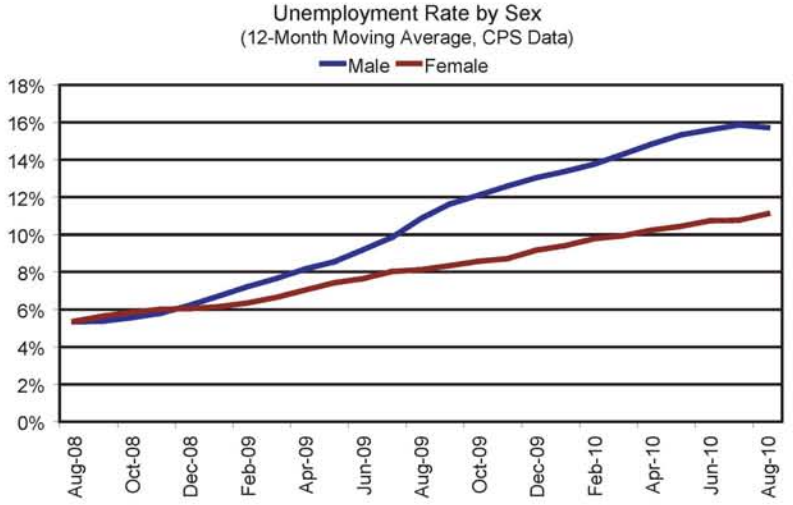
- Initial claims for unemployment insurance had a marginal decrease in August from July by 21. Over-the-year, claims are down by 16.1 percent.
- Final payments, signifying an exhaustion of regular State benefits, increased in August from July by 732. Over-the-year, final payments were down 35.5 percent.



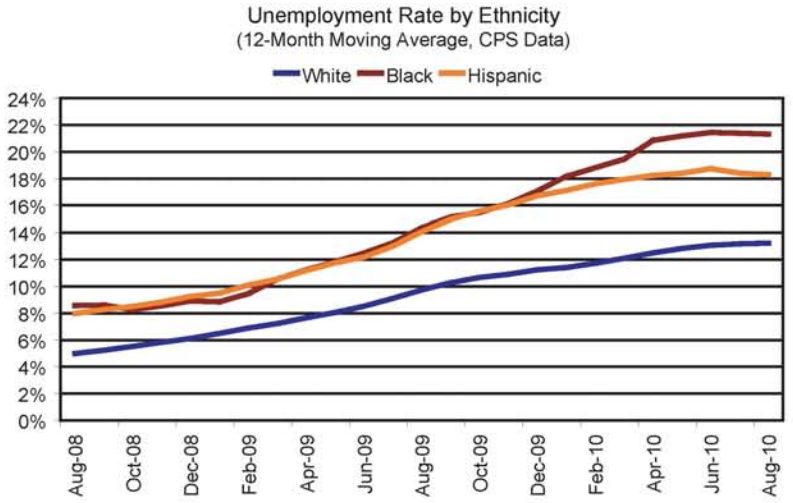
Trends at a Glance

Demographics of the Unemployed

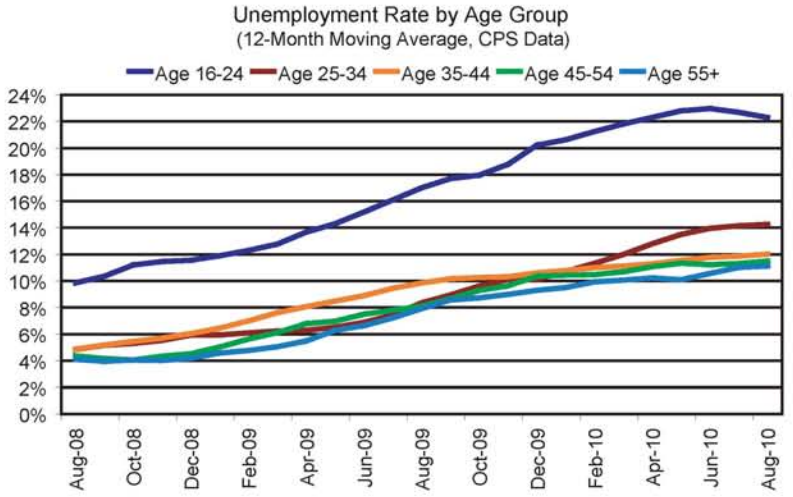
- The male unemployment rate decreased two-tenths of a percent to 15.7 percent.
- The female unemployment rate increased three-tenth of a percent to 11.1 percent.
- Traditionally male dominated industries, such as construction have lost the most jobs during the recession, while female dominated industries have fared better overall.



- The unemployment rate for Nevada's Hispanic labor force decreased one-tenth of a percent to 18.3 percent in August.
- The rate for Nevada's unemployed Black labor force decreased one-tenth of a percentage point to 21.3 percent.
- The unemployment rate for Nevada's White labor force remain unchanged from August at 13.2 percent.



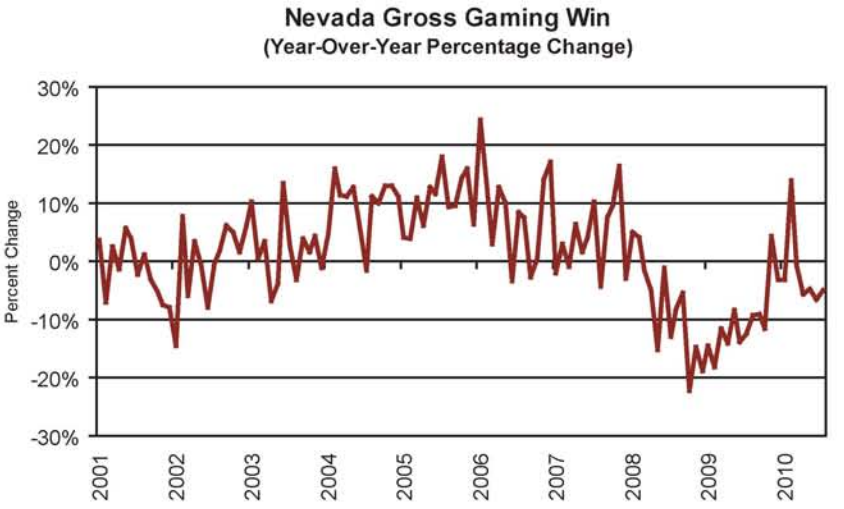
- At 22.3 percent, the unemployment rates for Nevada's youngest workers age 16-24 continued to trend higher than any other age group.
- The unemployment rate for workers age 25-34 increased one-tenth to 14.3 percent.
  The unemployment rate for Nevada's oldest workers is 11.1 percent, up one-tenth from August.



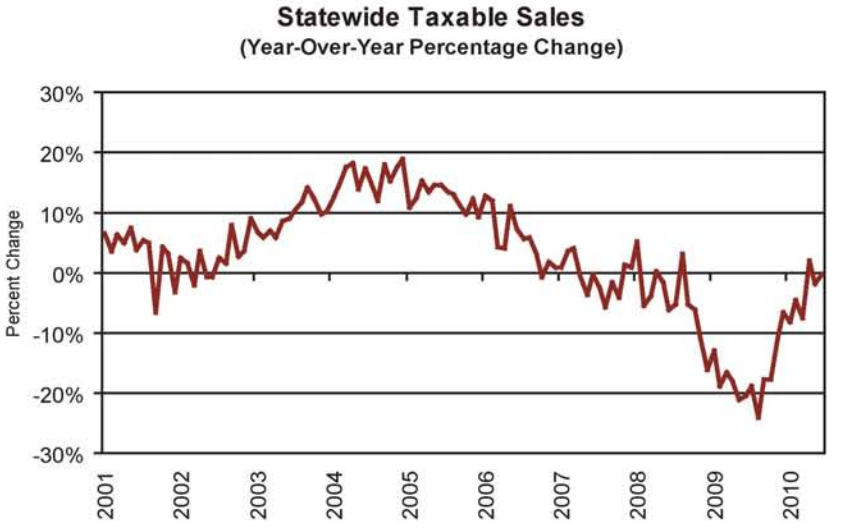
Trends at a Glance

Economic Indicators

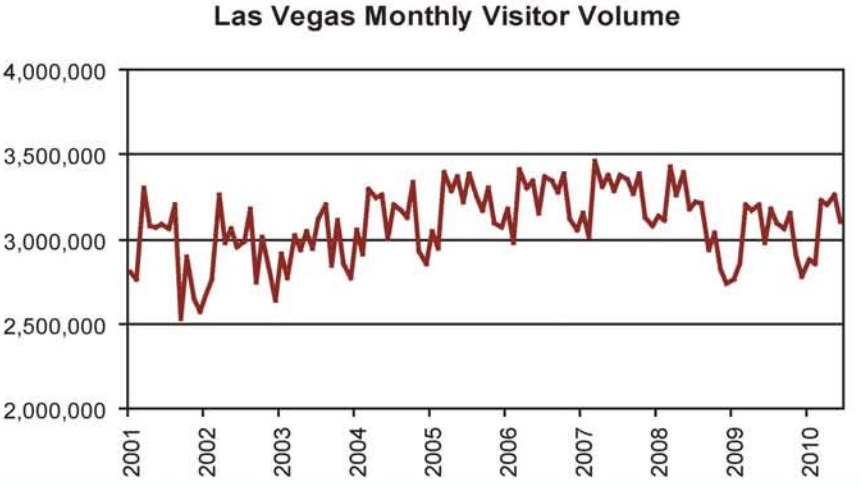
- Nevada gaming win was down 4.9 percent in July relative to the previous year.



- In June, taxable sales decreased 0.3 percent over June 2009, with collections totalling $3,330,806,752.
- For the fiscal year-to-date, taxable sales are down 10.3 percent compared to the same period in 2009.



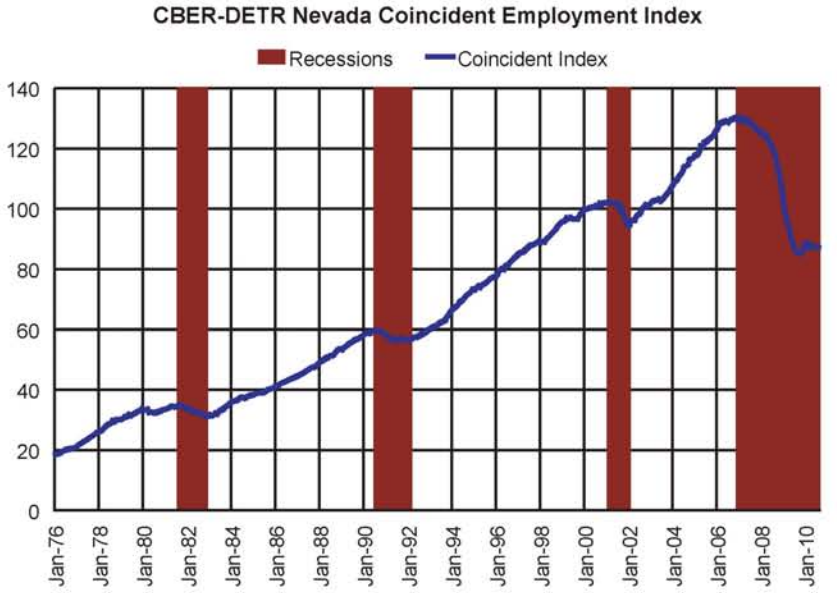
- Las Vegas visitor volume increased 149,519 in July relative to a year prior, a 4.7 percent increase. Year-to-date, visitor volume is up 2.3 percent in 2010 compared to a year earlier.



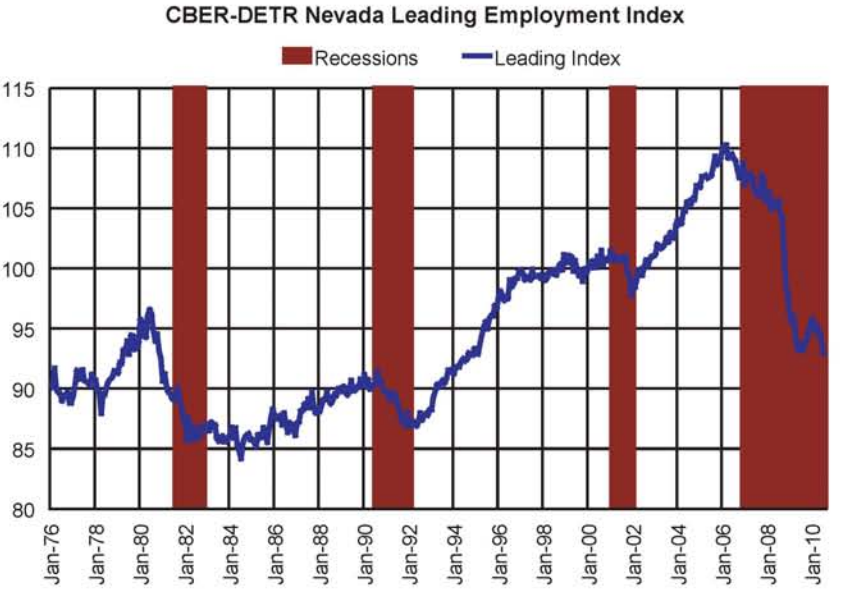
Trends at a Glance

CBER-DETR Nevada Coincident and Leading Employment Indices

- Although the National Bureau of Economic Research Business Cycle Dating Committee just called an end to the national recession in June 2009, the evidence that the current Nevada employment recession has ended gets shakier each month. Previous reports raised the question as to whether we saw a bottom to the coincident index. The chart still identifies that bottom tentatively as October 2009. But since reaching its most recent high value in January 2010, the coincident index fell each month through April. May and June rose each ever so slightly. July and August dropped again by a small amount.



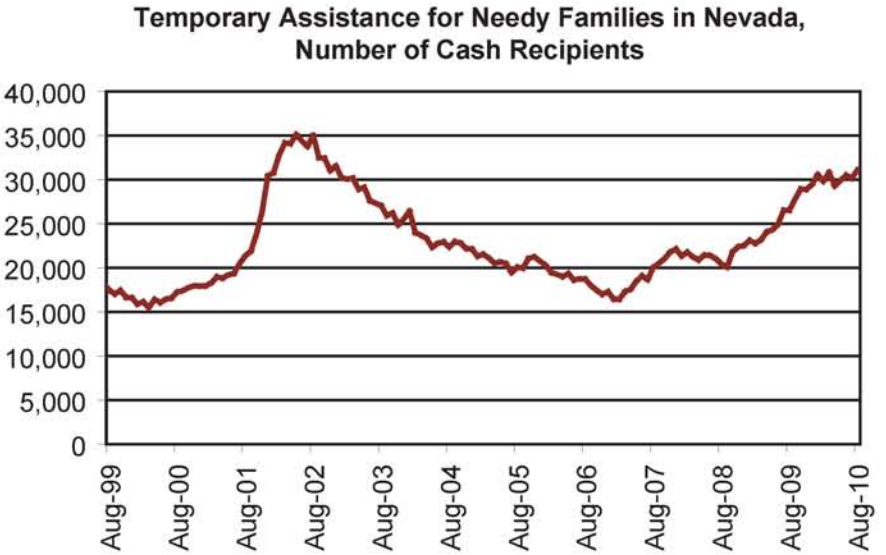
- The Nevada leading employment index, which provides a signal about the future direction of the coincident index, showed slight decrease of 0.1 percent from July. In August, the components of the leading index experienced the following changes -- commercial permits and the short-duration unemployment rate (inverted) moved in a positive direction. The remaining variables – initial claims for unemployment insurance (inverted), the real Moody's Baa bond rate (inverted), housing permits, and construction employment – moved in a negative direction. For the current employment recession, the leading index provided a clear signal by peaking in March 2006, nine months before the coincident index reached its peak. Based on current data, the leading index reached a trough in August 2009. After reaching its most recent high in January 2010, the leading index fell in six of the last seven months, breaking through its August 2009 low in July and August 2010.



Trends at a Glance

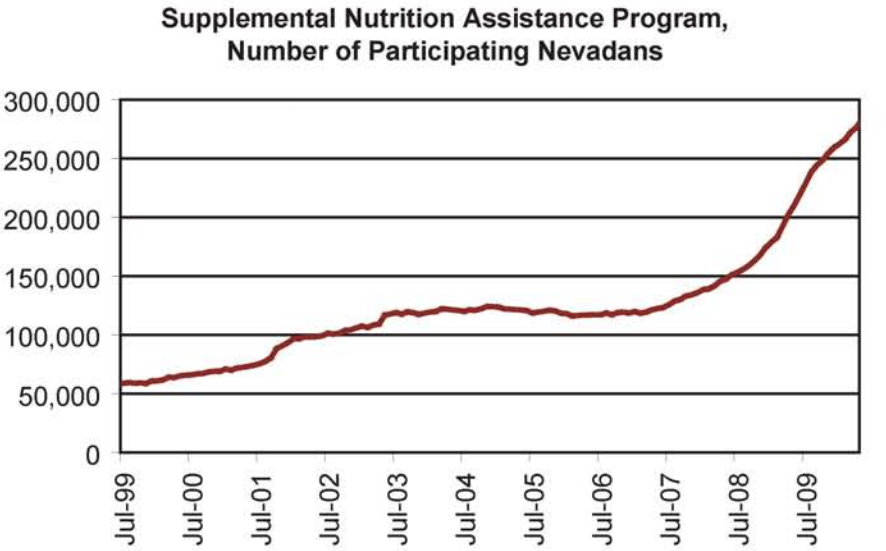
Welfare Indicators

- The Temporary Assistance for Needy Families (TANF) program provides time-limited cash assistance to low-income families with children so they can be cared for in their own home. TANF also seeks to reduce dependency by promoting job preparation, reduce out-of-wedlock pregnancies and encourage the formation and maintenance of two-parent families.
- As an economic indicator, TANF reveals information on the relative well-being of Nevada's low-income families. The number of recipients in the program is strongly influenced by the ups and downs of the business cycle. In August, 31,076 individuals were receiving assistance. Since August 2009, the level of assistance has increased 17.1 percent or 4,536 additional recipients.



Source: Nevada Department of Health and Human Services

- The Supplemental Nutrition Assistance Program (SNAP), formerly known as "food stamps", provides the means to increase food purchasing power to raise the nutritional level among low-income households and is the first line of defense against hunger for thousands of Nevadans.
- The number of Nevadans participating in SNAP has increased significantly in recent years, suggesting more and more families are struggling to make ends meet. In July, 299,168 Nevadans participated in the program. Over-the-year, the number of participants receiving assistance has increased 30.9 percent.



Source: Nevada Department of Health and Human Services

State of Nevada
Department of Employment, Training & Rehabilitation
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ECONOMY IN BRIEF

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ECONOMY IN BRIEF

July 2010

DETR RESEARCH & ANALYSIS BUREAU

NEVADA'S PREMIER SOURCE OF WORKFORCE & ECONOMIC INFORMATION AND ANALYSIS

Economic Summary

In July, Nevada's unemployment rate ticked up one-tenth to 14.3 percent, with an estimated 195,800 jobless workers seeking employment. It is the smallest one month increase of the year, but marks the 16th consecutive month the rate has increased to a new record high. Weakness in Nevada's job markets persists with both the public and private sectors reporting less employment over-the-month. In total, Nevada's employers reported 9,600 fewer jobs in July. There were 5,600 less public sector jobs, while the private sector, for the first time since March reported fewer jobs as well.

Industries seeing improvement include the trade, transportation and utilities sector, which added 800 jobs in July. Since January, the industry is up 3,500 jobs. The natural resources and mining industry added 200 additional jobs to the 900 created since the start of the year. The construction industry remained essentially flat in July, losing just 100 jobs. Summer seasonal layoffs in public education drove government employment lower in July. Federal government employment was flat in July, but will decline over the next few months as the decennial census winds down. Professional and business services cut 2,300 jobs. Particularly troubling within this sector is the continued contraction of the employment services industry. These employers supply temporary workers to expanding businesses. Growing demand for temporary workers is usually a precursor for future permanent hiring. With a drop of 800 jobs in July, expectations for future hiring remain weak.

Unemployment Rate by County

In the Las Vegas-Paradise area, employers shed 5,700 jobs in July. Over-the year, employment is down 18,800, a 2.3 percent decline. Retail added 600 jobs, while professional and business services and government payrolls fell by 2,000 each. Reno-Sparks employment slid 2,600 in July and is down 7,900 or 4.1 percent from the same month a year ago. Private sector employment was essentially flat, while government reduced payrolls by 2,400. Carson City employment held steady in July, but is down 1,000 or 3.3 percent over-the-year.

In June, the unemployment rate in the Las Vegas-Paradise metro area was the highest among all metropolitan areas in the U.S. with a population of a 1,000,000 or more. Despite an increase of an additional two-tenths to 14.8 percent in July, Las Vegas fell to third behind Detroit, Michigan and the Riverside-San Bernardino area of California. In Reno-Sparks, the unemployment rate held steady at 13.6 percent. In Carson City, the rate declined one-tenth to 13.2 percent, while the unemployment rate fell a half-point to 8.0 percent in the Elko

Economic Indicators

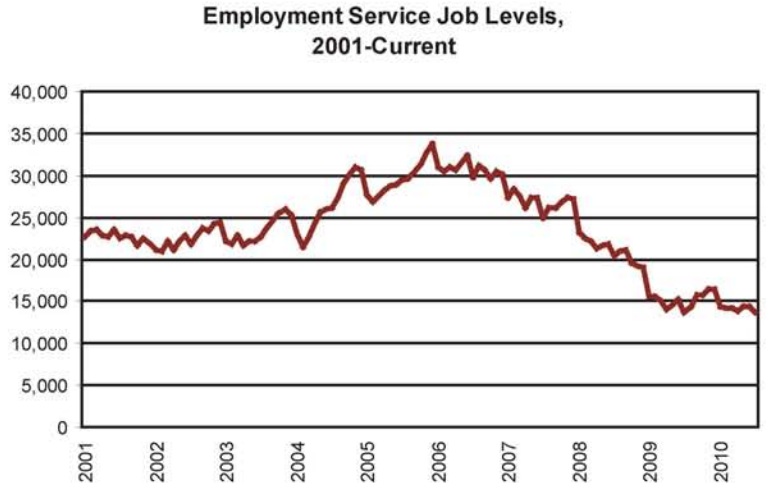
UNEMPLOYMENT RATES	Jul 2010
NEVADA *	14.3%
LAS VEGAS-PARADISE MSA	14.8%
RENO-SPARKS MSA	13.6%
CARSON CITY MSA	13.2%
ELKO MICROPOLITAN AREA	8.0%
UNITED STATES *	9.5%
CALIFORNIA *	12.3%
* Seasonally Adjusted	
JOB GROWTH (Y-O-Y)	
NEVADA	-2.2%
LAS VEGAS-PARADISE MSA	-2.3%
RENO-SPARKS MSA	-4.1%
CARSON CITY MSA	-3.3%
UNITED STATES	0.0%
CALIFORNIA	0.8%
CONSUMER PRICE INDEX (Y-O-Y)	
UNITED STATES	1.2%
GAMING WIN (Y-O-Y)	
JUN 2009 - JUN 2010	
NEVADA	-6.7%
CLARK COUNTY	-6.9%
WASHOE COUNTY	-9.2%
TAXABLE SALES (Y-O-Y)	
JUN 2009 - JUN 2010	
NEVADA	-0.3%
CLARK COUNTY	-1.0%
WASHOE COUNTY	0.3%

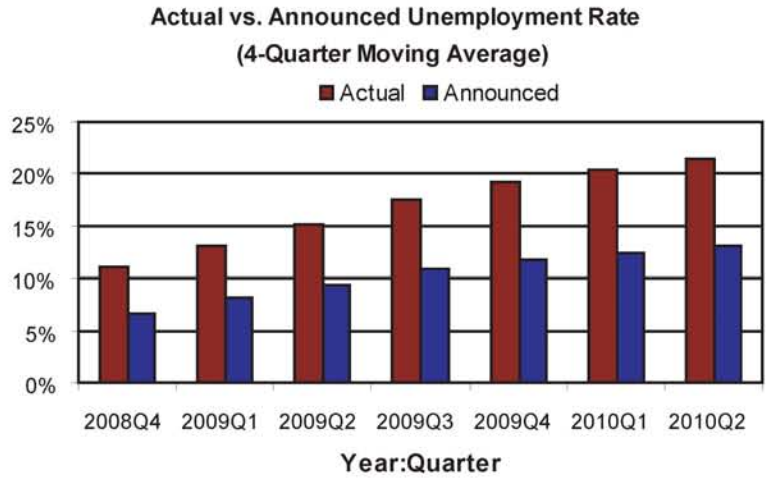
Economic Summary

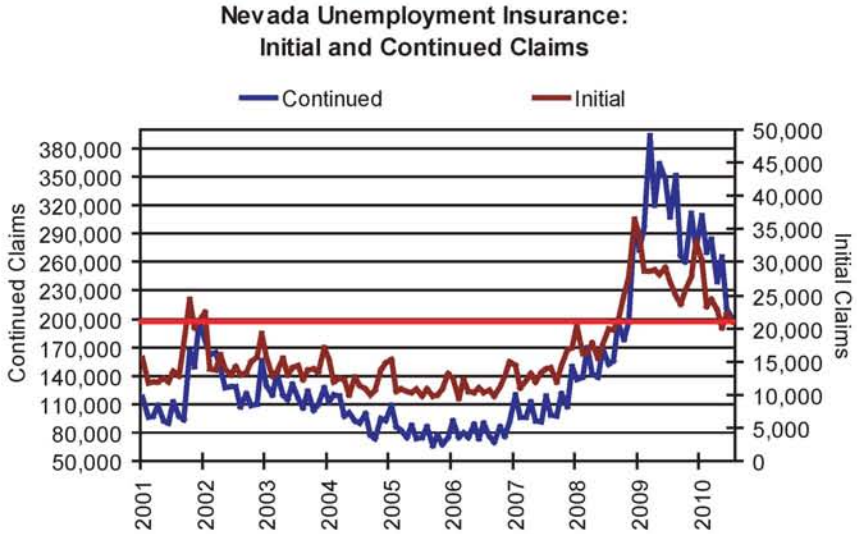
region. (Unemployment rates for the State's metropolitan areas are not adjusted for seasonality. For comparison purposes, the State's unadjusted unemployment rate was 14.4 percent in July, up from 14.3 percent in June.)

Despite the historic run up in the unemployment rate, the reality of the recession's impacts on Nevada's workforce is much worse than presented. A known weakness of the announced unemployment rate is that it underestimates the number of unemployed workers; it only estimates unemployed workers who are actively seeking employment. It does not include workers who are too discouraged to seek employment and have given up searching, or workers employed part time for economic reasons. The Bureau of Labor Statistics measures the actual unemployment rate by state as a four quarter moving average. Nevada's actual unemployment rate through the second quarter of 2010 is 21.5 percent. That compares to an announced rate of 13.1 percent over the same time frame, an 8.4 percentage point difference. Use of the alternative measure of unemployment for research purposes is limited since the information is only available for the past 5 years, so comparisons to past recessions is not possible. But, from a policy perspective, the actual unemployment rate presents a more complete picture of what is currently occurring in the economy.

Activity for regular unemployment insurance benefits (does not include federal or state extensions) has been decreasing of late, but still remains significantly high by historical standards. During the current recession, initial claims peaked in December 2008 at 36,414 and continued claims peaked in March 2009 at 393,388. In July, initial claims were down to 20,990 and continued claims fell to 199,875, a drop of 42.4 and 49.2 percent, respectively. Prior to this recession, the largest number of claims filed occurred in





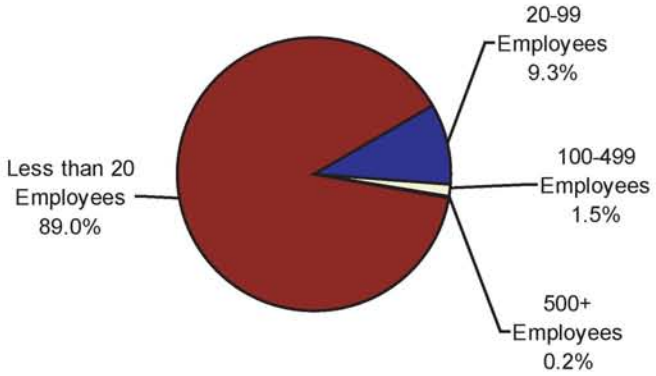


Economic Summary

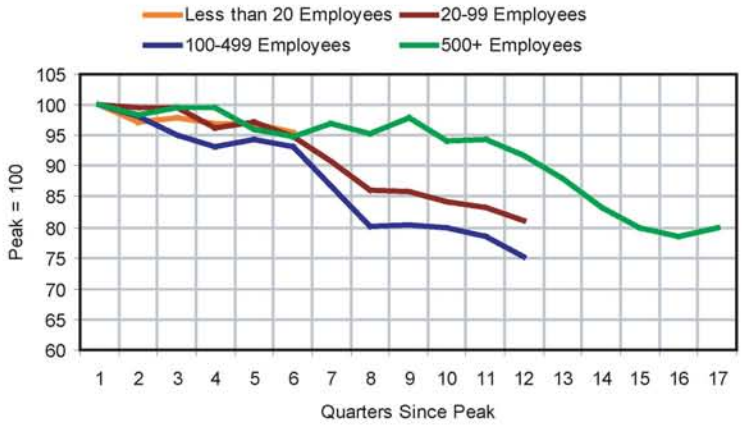
the month following the September 11th terrorist attacks. At the time, initial claims totaled 24,419, while continued claims peaked two months later in December 2001 at 196,424. Despite the recent retreat of initial and continued claims, activity is just now falling to levels comparable with the recession of 2001.

Small business in Nevada is the back bone of the State's economy. Its broad diversification has created a more stable environment for its workers during the recession. Though small individually, combined, small employers with less than 20 employees provide a significant proportion of both work sites and jobs in the State. For instance, in the fisrt quarter of 2010, work sites with less than 20 employees made up 89.0 percent of all business locations in the State and 25.7 percent of total employment. In the recession, small businesses have provided more stability than larger firms as a whole. Taken together, small business employment peaked later and fell less than other size classes. Since peaking in the fourth quarter of 2008, small businesses have fallen 3.1 percent from peak employment, while the total employment of businesses with greater than 500 employees peaked three years earlier and has lost 20 percent of peak employment. The disparity is likely due to differences in diversification among business sizes. Small business tends to be more diverse and less reliant on a consumer driven economy. Taken as whole, Nevada's proportion of jobs in leisure and hospitality is roughly 27.4 percent of all jobs, while the concentration in small business is nearly half that at just 14.0 percent. On a percentage basis, small businesses employ more jobs in the financial services (11.2 vs. 4.8 percent); professional and business services (17.3 vs. 12.2 percent); and trade, transportation and utilities (25.0 vs. 19.9 percent) than in the broader economy. As the State begins to recover from the recession, Nevada's economy will lean heavily on the diversification and innovation of its small businesses.

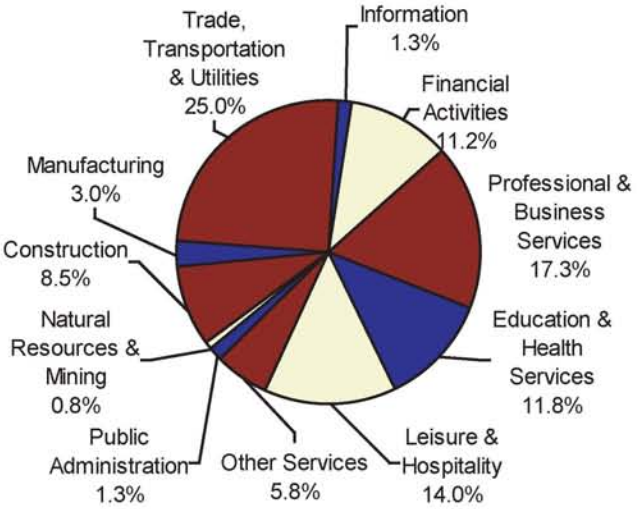
Work Sites Distributed by Size



Employment Impacts on Businesses by Size Classification



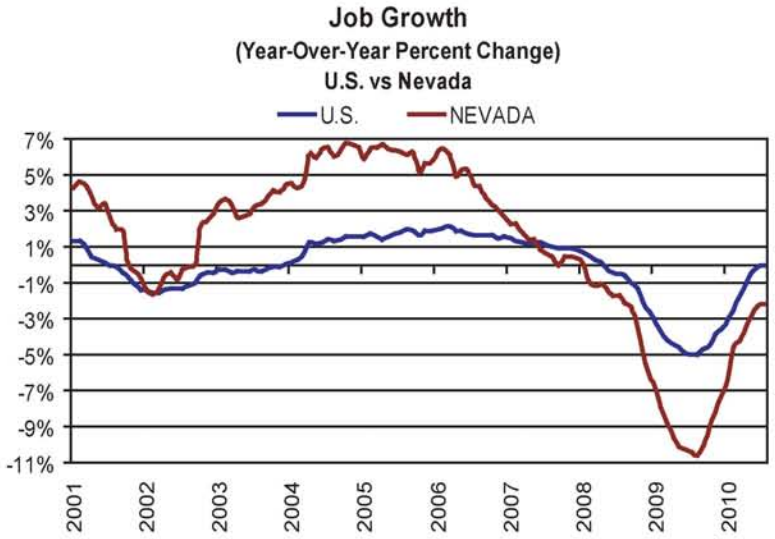
Industry Distribution of Small Businesses in Nevada, 2010:QI



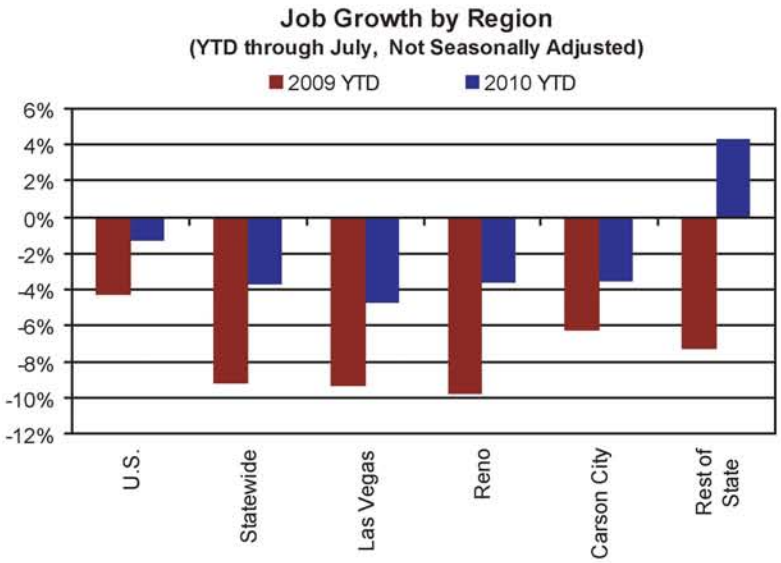
Trends at a Glance

Industrial Employment

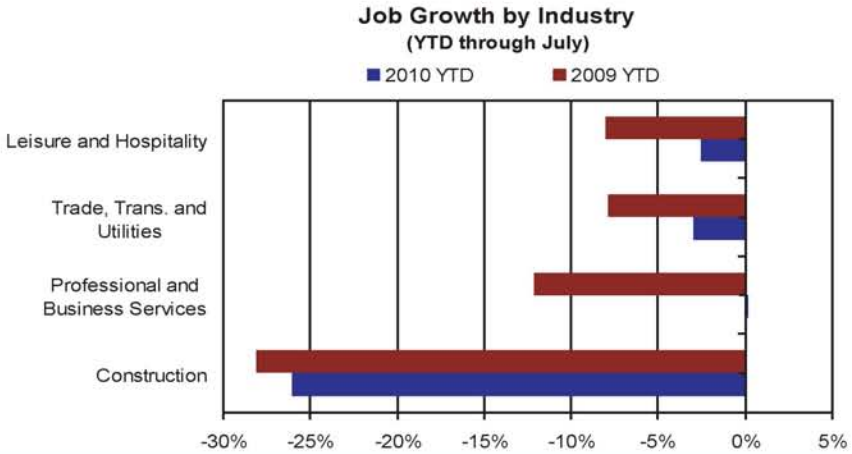
>Industrial employment in Nevada fell 2.2 percent in July relative to a year prior, equating to a loss of 25,100 jobs.
>July job readings were nearly unchanged nationally relative to July 2009.



>The year-to-date annual growth rates remain higher than a year ago throughout all regions of the State.
>The Las Vegas MSA's job count fell 4.7 percent YTD in July relative to July 2009.
>In the Reno MSA, YTD job readings were down 3.6 percent in July 2010.
>In Carson City, employment fell 3.6 percent YTD from July 2009 to July 2010.
>Job growth was up 4.3 percent in non-metro areas of the State.



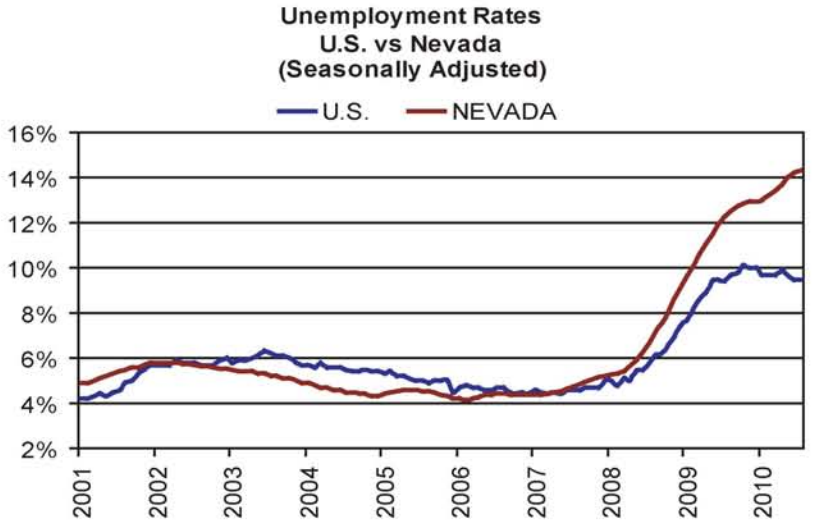
>Approximately 23,300 jobs have been lost in the construction industry YTD through July, a 26.0 percent annual decline, though the decline softened for the third straight month. The YTD annual growth rate is higher relative to a year prior.
>Job losses in the State's largest industry, leisure and hospitality, continues to moderate. Industry employment was down 2.5 percent YTD through July relative to a year prior. A year earlier, job losses were down 8.1 percent over the same time frame.



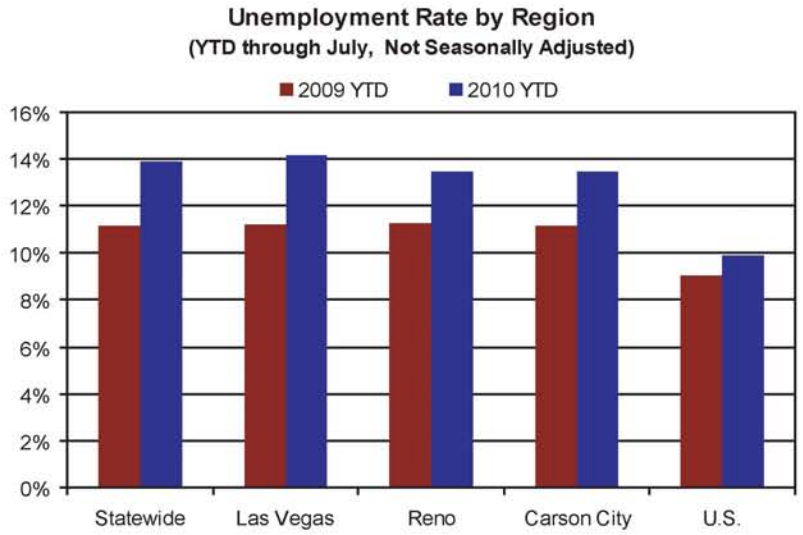
Trends at a Glance

Unemployment

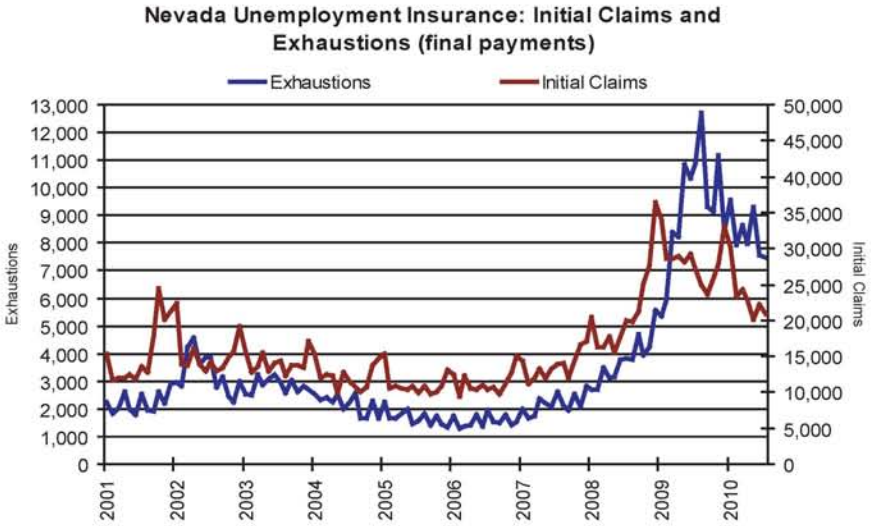
>Nevada's seasonally adjusted unemployment rate was 14.3 percent in July. Nevada has the highest unemployment rate in the nation. The next highest is Michigan with 13.1 percent.
>Nationally, the unemployment rate was unchanged at 9.5 percent in July. Nevada's jobless rate exceeded the national average by 4.8 percentage points.



>At 13.9 percent, the Statewide unadjusted unemployment rate is up 2.8 percentage points YTD from 2009 to 2010.
>The Las Vegas-Paradise MSA recorded an unemployment rate of 14.2 percent YTD through July, a 3.0 percentage point increase over-the-year.
>The Reno-Sparks MSA's jobless rate was 13.4 percent YTD through July. On an annual basis, the rate is up 2.2 percentage points over-the-year.
>The jobless rate in Carson City was 13.4 percent YTD in July, up 2.2 percentage points over-the-year.



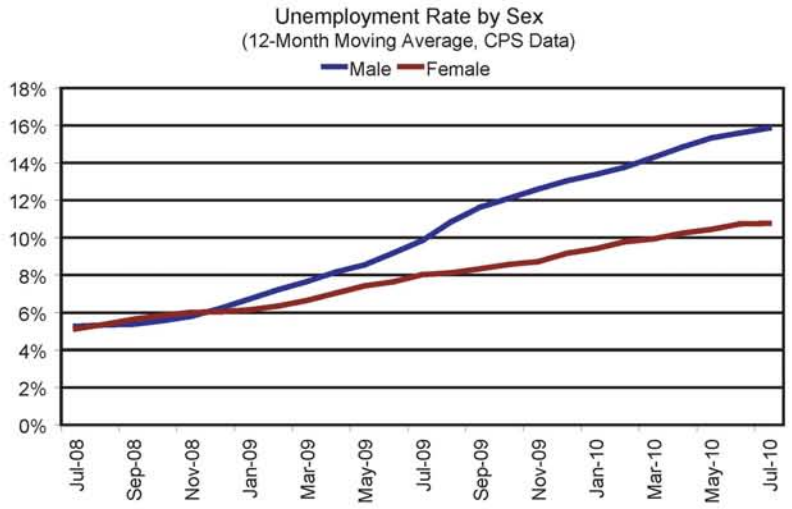
>Initial claims for unemployment insurance decreased by 1,224 in July to 20,990. Over-the-year, claims are down by 22.5 percent.
>Final payments, signifying an exhaustion of regular State benefits had a marginal decrease in July from June by 110. Over the-year, final payments were down 31.4 percent.



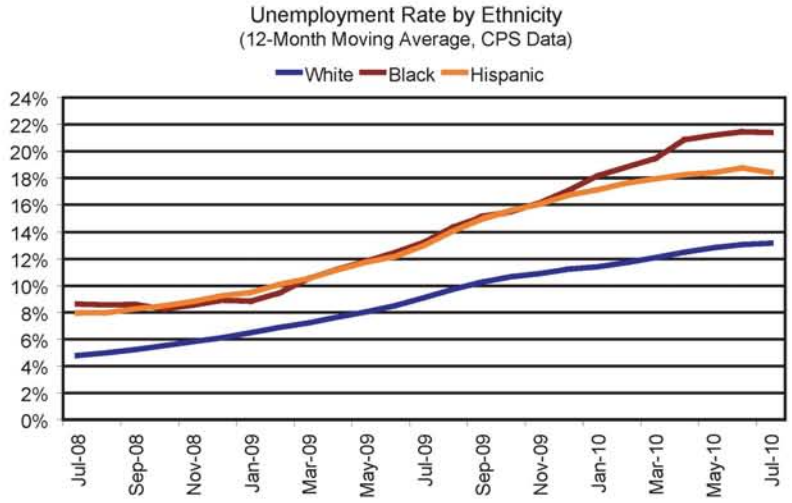
Trends at a Glance

Demographics of the Unemployed

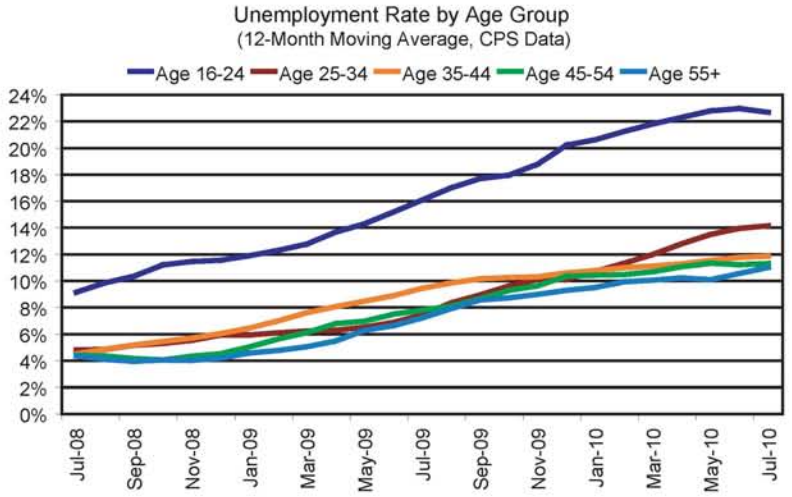
>The male unemployment rate increased three-tenths of a percent to 15.9 percent.
>The female unemployment rate increased one-tenth of a percent to 10.8 percent.
>Traditionally male dominated industries, such as construction have lost the most jobs during the recession, while female dominated industries have fared better overall.



>The unemployment rate for Nevada's Hispanic labor force decreased three-tenths of a percent to 18.4 percent in July.
>The rate for Nevada's unemployed Black labor force remain unchanged from June at 21.4 percent.
>The unemployment rate for Nevada's White labor force increased one-tenth of a percentage point to 13.2 percent.



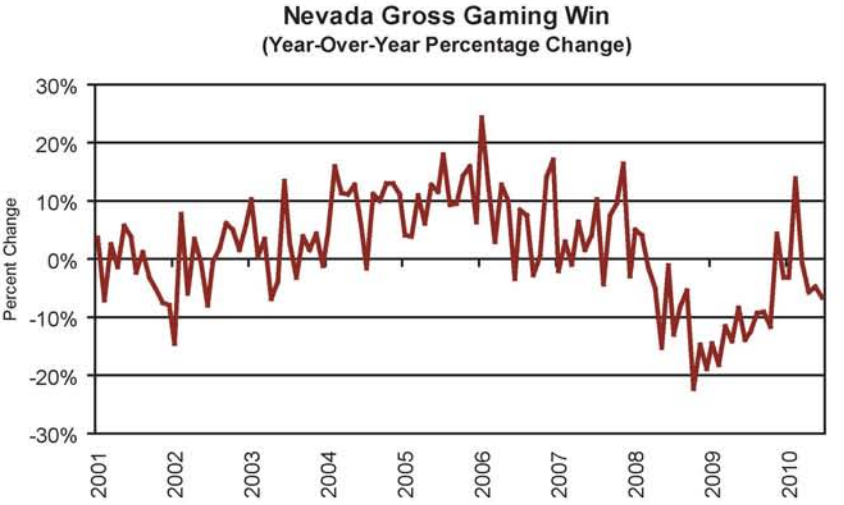
>Nevada's youngest workers continue to bear the brunt of the recession worse than any other age group. At 22.7 percent, the unemployment rate for workers age 16-24 is nearly twice the rate of other groups.
>The unemployment rate for workers age 25-34 increased two-tenths to 14.2 percent.
>The unemployment rate for Nevada's oldest workers is 11.0 percent, up four-tenths from May.



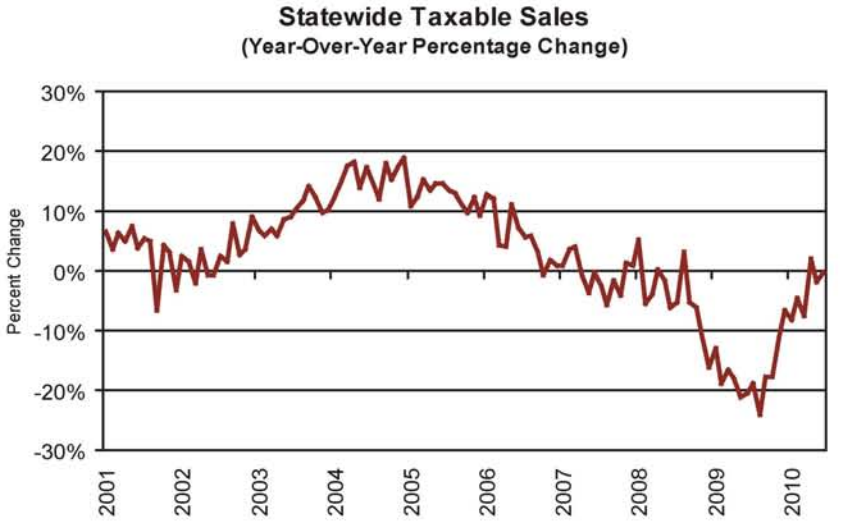
Trends at a Glance

Economic Indicators

>Nevada gaming win was down 6.7 percent in June relative to the previous year.
>For the fiscal year, gaming win has decreased 4.3 percent.



>In June, taxable sales decreased 0.3 percent over June 2009, with collections totalling $3,330,806,752.
>For the fiscal year-to-date, taxable sales are down 10.3 percent compared to the same period in 2009.

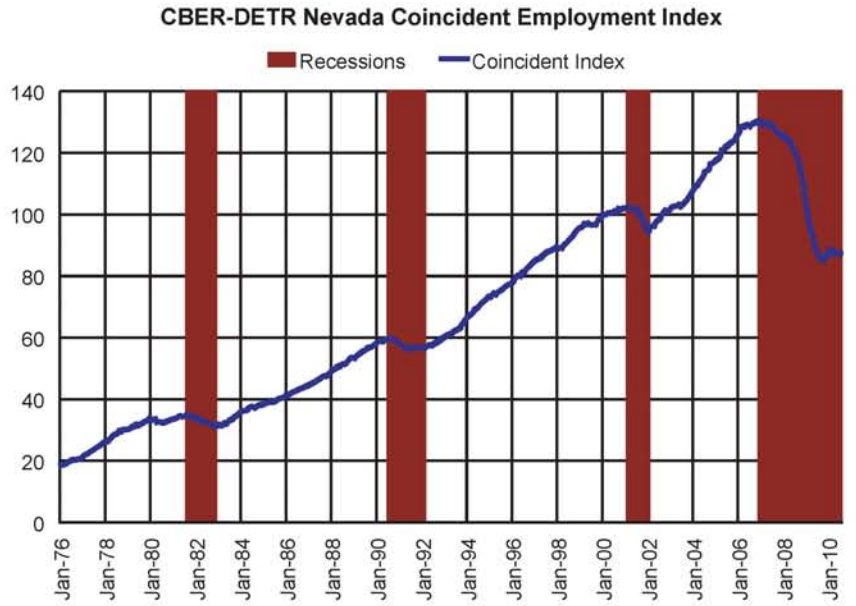


>Las Vegas visitor volume increased 126,843 in June relative to a year prior, a 4.3 percent increase. Year-to-date, visitor volume is up 1.9 percent in 2010 compared to a year earlier.

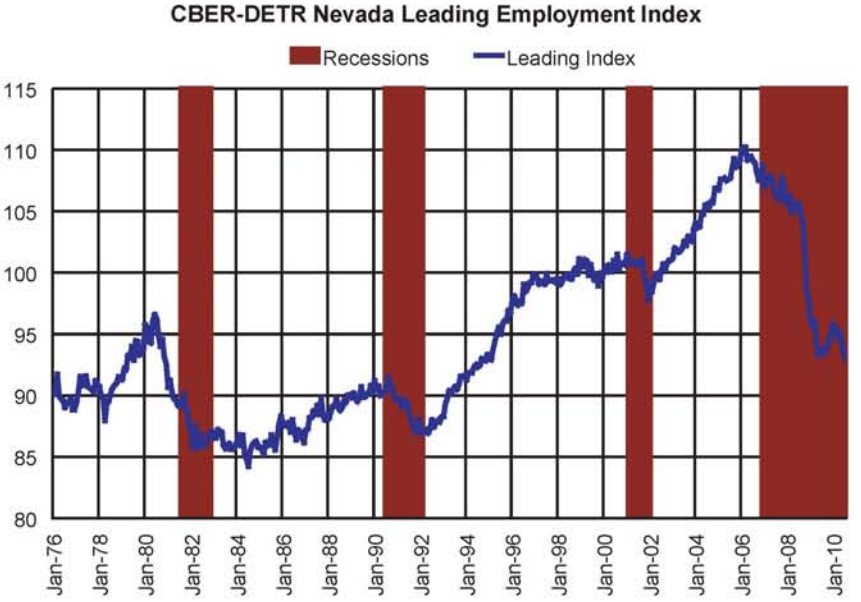
Trends at a Glance

CBER-DETR Nevada Coincident and Leading Employment Indices

>In sum, the evidence that the current employment recession has ended gets shakier each month. Previous reports raised the question as to whether we saw a bottom to the coincident index. The chart still identifies that bottom tentatively as October 2009. But since reaching its most recent high value in January 2010, the coincident index fell each month, with the largest fall from March to April. May and June rose ever so slightly from April. July dropped again by a small amount.



>The Nevada leading employment index, which provides a signal about the future direction of the coincident index, showed decrease of 0.8 percent from June. In July, the components of the leading index experienced the following changes -- initial claims for unemployment insurance (inverted) and the real Moody's Baa bond rate (inverted) moved in a positive direction. The remaining variables – commercial permits, housing permits, the short-duration unemployment rate (inverted), and construction employment – moved in a negative direction. For the current employment recession, the leading index provided a clear signal by peaking in March 2006, nine months before the coincident index reached its peak. Based on current data, the leading index reached its trough in August 2009. After reaching its most recent high in January 2010, the leading index fell in five of the last six months, tracing its way back to just below August 2009 low.

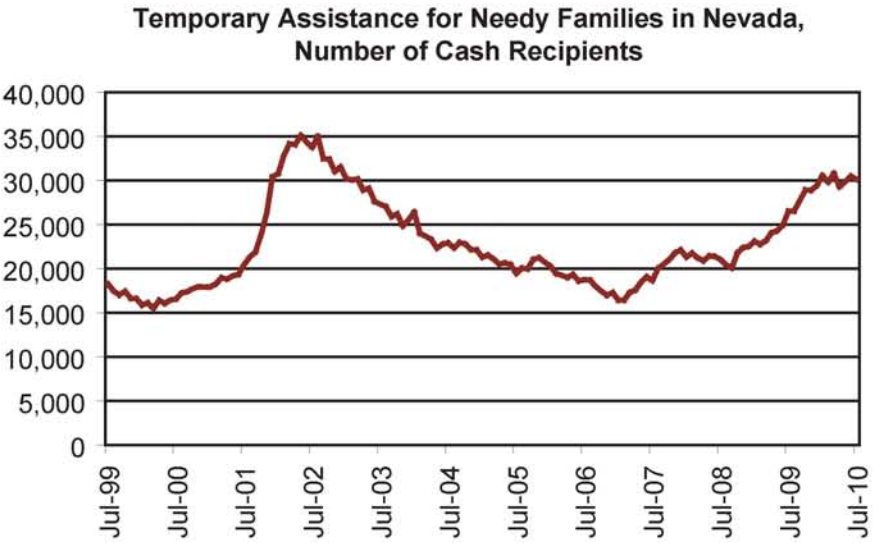


Trends at a Glance

Welfare Indicators

>The Temporary Assistance for Needy Families (TANF) program provides time-limited cash assistance to low-income families with children so they can be cared for in their own home. TANF also seeks to reduce dependency by promoting job preparation, reduce out-of-wedlock pregnancies and encourage the formation and maintainence of two-parent families.

>As an economic indicator, TANF reveals information on the relative well being of Nevada's low-income families. The number of recipents in the program is strongly influenced by the ups and downs of the business cycle. In July, 30,160 individuals were receiving assistance. Since July 2009, the level of assistance has increased 13.7 percent or 3,629 additional recipients.



Source: Nevada Department of Health and Human Services

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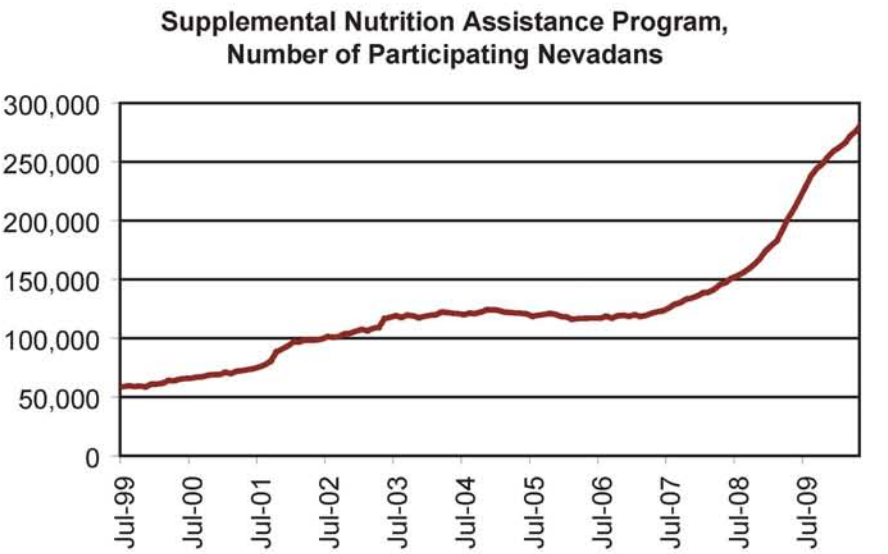

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