

# Economy In Brief

April 2015



A Monthly Review of Workforce & Economic Information by the Research & Analysis Bureau

## Economic Summary

For the 52nd consecutive month, year-over-year job gains have been recorded in Nevada. April's reading stands 41,400 above the same month last year, for a growth rate of 3.4 percent. We expected a gain of 3,900 jobs from March, but realized a gain of 16,700, leading to a seasonally adjusted increase of 12,800. This is quite a substantial gain. In fact, it is the strongest month-over-month increase since April 2005. However, it is, by no means, cause for undue celebration. The underlying trend of steady, broad-based, and sustainable growth is far more encouraging than an employment spike in a single month.

In order to highlight that underlying trend of steady employment growth, we take a look at the performance of Nevada's private sector over the course of the recovery. Since 2011, job growth has been accelerating. 11,500 private sector jobs were added that year, followed by gains of 20,000 in 2012, 27,800 in 2013, and 39,700 in 2014. When we consider 2015 data year-to-date, relative to the same period in 2014, we see that the Silver State is on pace to add another 38,900 private sector jobs. Should recent trends hold during the remainder of the year, Nevada's private sector payrolls are on pace to grow by 137,900 relative to 2010.

Construction continues to lead the industrial supersectors in terms of year-over-year job gains, up 9.2 percent in April, which equates to a

gain of 5,700 jobs. The leisure and hospitality sector experienced the largest nominal growth this month, adding 15,300 jobs to payrolls, a growth rate of 4.6 percent. The only sector to lose employment this month was mining, which shed 700 jobs, a contraction of 4.9 percent.

This month, we continue our analysis of Nevada's occupational structure. The highest-paying occupations in the Silver State are obstetricians/gynecologists, surgeons, and anesthesiologists, earning \$261,800, \$259,900, and \$257,300 per year on average, respectively. Of the ten highest-paying occupations, the largest are chief executives (1,500 jobs) and family/general practitioners (1,000 jobs). Eight of the ten highest-paying occupations are generally employed in the health care industry. The exceptions are chief executives (which most commonly are employed in the corporate, subsidiary, and regional managing offices industry); and judges, magistrate judges, and magistrates (which, in Nevada, are employed only in the State and local government sector).

However, the occupations reported above only encompass 3,650 jobs in Nevada, less than 0.5 percent of total jobs in the State. As such, we also examine the ten largest occupations which pay an annual wage above the State average of \$42,300. The largest occupations meeting this threshold are registered nurses (18,400 jobs), general/operations managers (17,300

### Economic Indicators

#### UNEMPLOYMENT RATES April 2015

Nevada*	7.1%
Las Vegas MSA	7.1%
Reno-Sparks MSA	6.7%
Carson City MSA	7.7%
Elko Micropolitan Area	5.4%
United States*	5.4%

#### JOB GROWTH (YOY)

Nevada*	3.4%
Las Vegas MSA	3.2%
Reno-Sparks MSA	3.4%
Carson City MSA	0.0%
United States*	2.2%

#### GAMING WIN (YOY) March 2015

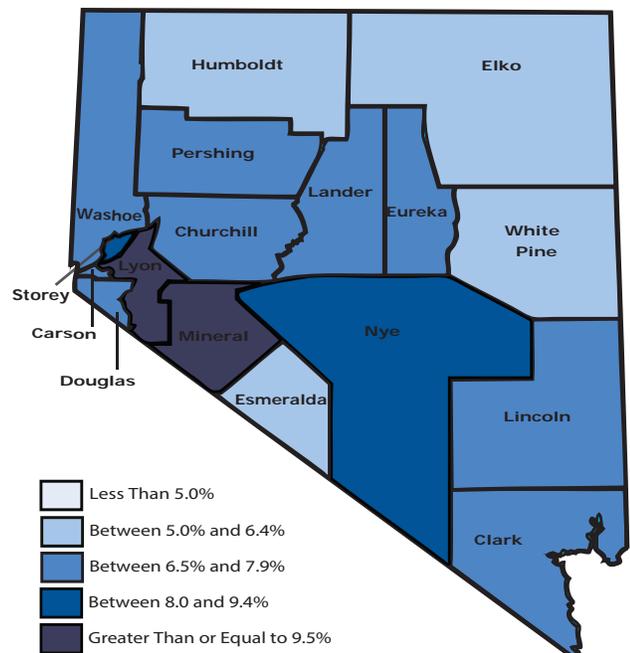
Nevada	-3.1%
Clark County	-4.0%
Washoe County	6.5%

#### TAXABLE SALES (YOY) March 2015

Nevada	9.1%
Clark County	8.7%
Washoe County	2.8%

\*Seasonally Adjusted

### Unemployment Rate by County



# Economic Summary

jobs), and first-line supervisors of retail sales workers (10,200 jobs). Of the largest occupations with above-average pay, the occupations with the highest wages are general/operations managers, registered nurses, and accountants/auditors, at a yearly average salary of \$101,400, \$80,200, and \$63,300, respectively. These top-ten occupations account for 108,000 jobs in Nevada, or 9.1 percent of total employment. According to Economic Modeling Specialists Intl. (EMSI), Clark County is home to 71.2 percent of the largest, high-paying, occupations, followed by Washoe County at 17.3 percent.

Prior to the economic downturn, the number of Nevadans employed full-time topped-out at nearly 1.1 million. At this peak level, full-time positions represented about 83 percent of total employment, according to the Current Population Survey. Silver State residents employed part-time numbered approximately 225,000. During the recession, full-time employment fell to almost 830,000, for a cyclical decline of more than 230,000. Part-time employment actually rose to more than 300,000, a gain of almost 90,000 positions. Since then, full-time employment has risen steadily, and in April stands at 987,000, a gain of nearly 157,000 from the recessionary low. The number of Nevadans employed on a part-time basis, on the other hand, has held steady over the past four years, reaching 302,000 in April. The evidence suggests that Nevada employment gains in the current recovery have been concentrated in full-time positions. Still, room remains for further improvement. Currently, 77 percent of total employment is full-time, while part-time positions account for 23 percent.

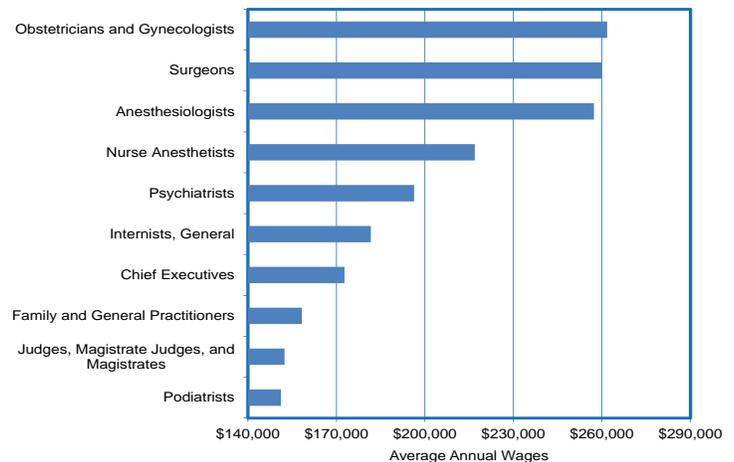
With data generated via the Labor Insight tool offered by Burning Glass Technologies, a supplier of “real-time” labor market information, we can add to this discussion via an assessment of the job market for full-time and part-time positions. There were 16,700 online postings for Nevada jobs during April. Of those, 10,000 specified work hours. Nearly 90 percent of those job ads were for

## Close to 100K New Private Sector Jobs Over 2010-2014; Trending 39K Higher This Year

**Nevada Job Growth Since 2010**

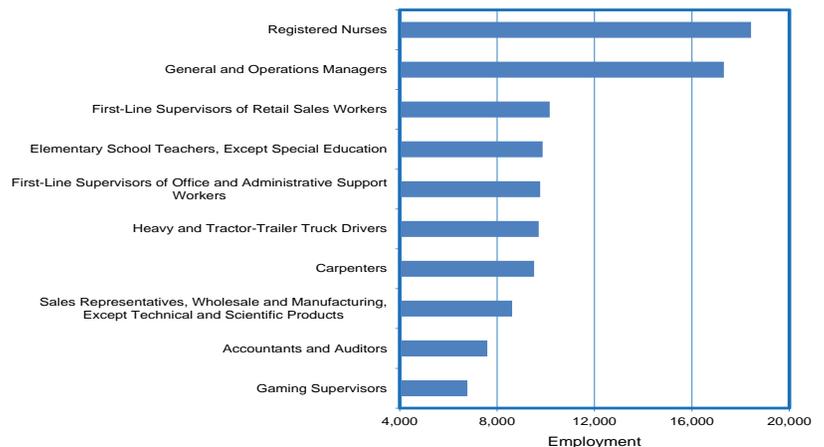
	Total (Private+Public)	Private Sector
<b>2010 Baseline</b>	1,117,800	964,000
<b>Calculation of 2011 Growth</b>		
2011	1,125,700	975,500
Growth from 2010	7,900	11,500
<b>Calculation of 2012 Growth</b>		
2012	1,144,800	995,500
Growth from 2011	19,100	20,000
<b>Calculation of 2013 Growth</b>		
2013	1,174,300	1,023,300
Growth from 2012	29,500	27,800
<b>Calculation of 2014 Growth</b>		
2014	1,215,300	1,063,000
Growth from 2013	41,000	39,700
<b>Calculation of 2015 Year-to-Date Growth</b>		
2014 Year-to-Date (through April)	1,193,600	1,039,900
2015 Year-to-Date (through April)	1,233,400	1,078,800
Year-to-Date Growth from 2014	39,800	38,900
<b>Total Growth Since 2010 (2011 Growth + 2012 Growth + 2013 Growth + 2014 Growth + 2015 YTD Growth)</b>	137,300	137,900

## Highest-Paying Occupations in Nevada Dominated by Healthcare 10 Highest-Paying Occupations; 2014 Occupational Employment Statistics



## RNs and Managers are Largest Occupations Paying Above-Average Wages in Nevada

### Largest Occs. Paying Above-Avg. Wages; 2014 Occupational Employment Stats



# Economic Summary

full-time positions. This is concurrent with the CPS data reported above, in that the jobs being created over the course of the recovery have been primarily full-time positions.

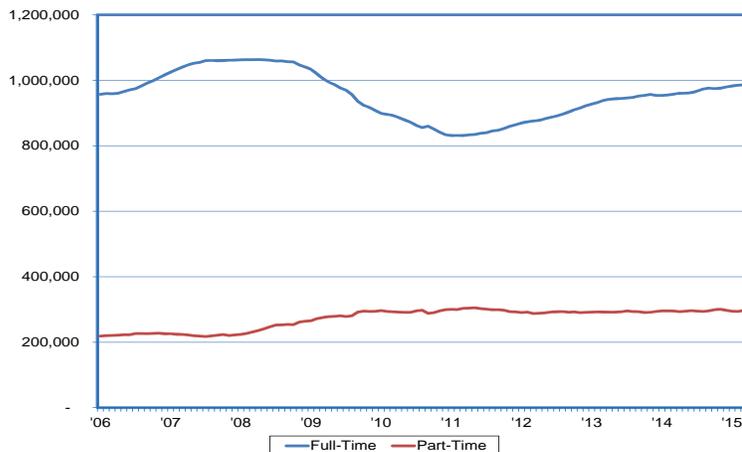
As an aside, our real-time labor market information capabilities also allow for an assessment of job postings by industry. The largest number of postings, about 1,800, is attributable to the traveler accommodation industry. Hospitals, with 1,000 postings, are next. The rest of the top-ten industries, in order are: insurance carriers, general government, the gambling industry, business support services, higher education, restaurants, depository credit intermediation, and child care services.

While April's employment news is very encouraging, Nevada's unemployment rate remained at 7.1 percent for the fourth consecutive month. Still, this translates into a decline of a full percentage point relative to a year ago. Furthermore, the jobless rate has been cut nearly in half since peaking in late-2010.

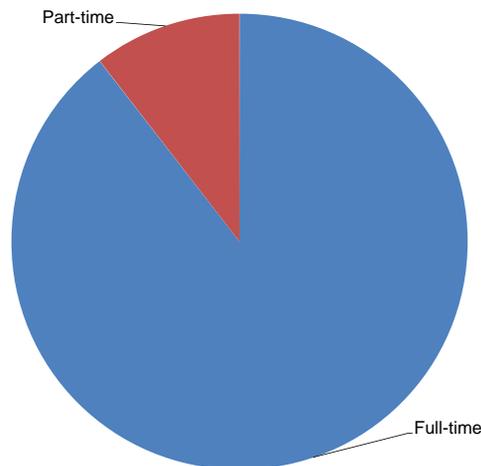
With such solid underlying employment trends, why hasn't the unemployment rate been trending down at a more pronounced clip, especially in recent months? The answer lies in the labor force...the number of Nevadans either working or actively looking for work. Between the first four months of 2014 and the same period this year, 16,600 Nevadans have entered the labor force. That translates into a 1.2 percent gain, compared to a 0.9 percent increase in the nation as a whole. As labor market fundamentals have improved, it has enticed more Nevadans to enter the labor force and search for work at a more pronounced rate than in the U.S.

To gauge the potential impacts of the expanding labor force on the unemployment rate, two alternative scenarios can be examined. As noted above, the Silver State's labor force is expanding faster than the nation's. Given underlying employment trends in place over the past year, if Nevada's labor force expanded at the same pace as in the

**Full-Time Employment Continues to Trend Up; Part-Time Remains Steady**  
Full-Time vs. Part-Time Employment (CPS data; 12-month moving average)

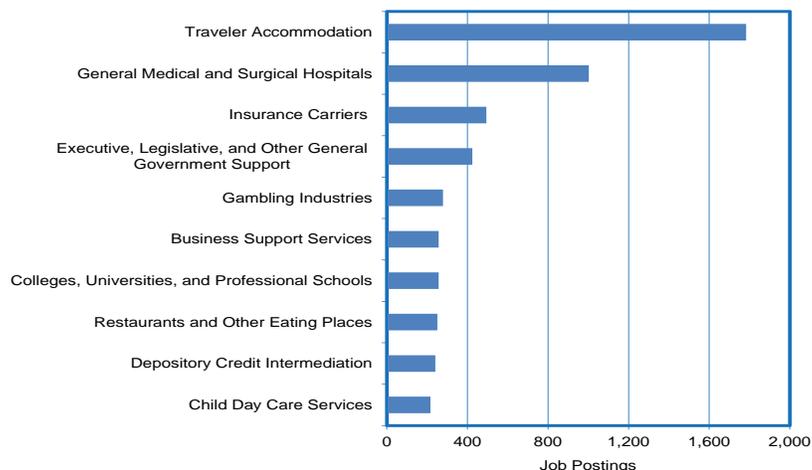


**9,000 Full-Time Nevada Job Postings vs. 1,100 Part-Time Ads**  
Online Job Postings in Nevada (April info from Burning Glass/Labor Insight)



**The Accommodations and Hospitals Industries Acct. for the Most Online Job Ads**

Top 10 Industries by Job Postings (April info from Burning Glass/Labor Insight)



# Economic Summary

U.S., it would have risen by 12,000, rather than 16,600. As a result, under this scenario, the unemployment rate would have averaged 6.8 percent through the first four months of the year, instead of the actual reading of 7.1 percent.

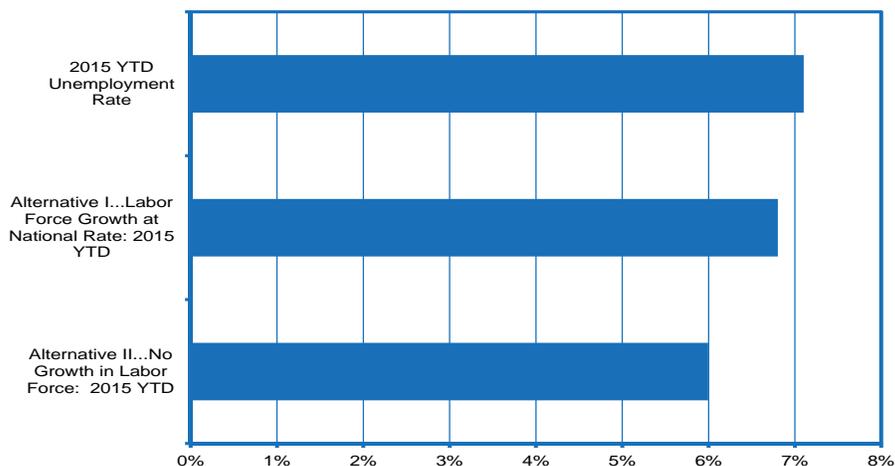
A second alternative scenario examines results with no growth in the labor force over the past year. Under such a scenario, there is a one-to-one correspondence between employment and unemployment...for every new job, there is a corresponding decline in unemployment. Given what has unfolded on the employment front over the past year, if Nevada's labor force had held steady, the jobless rate would have averaged six percent during this year's first four months.

While it is difficult to draw definitive conclusions concerning the impacts of an expanding labor force in Nevada on the State's unemployment rate, suffice it to say that it has acted to prevent more consistent downward pressure on joblessness in the Silver State.

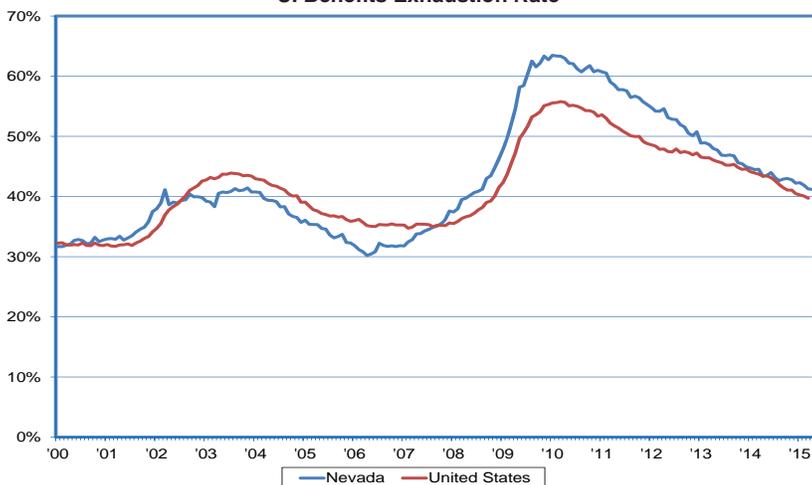
Claims for unemployment insurance benefits fell 9.2 percent on a year-over-year basis in April, to 13,600. Such a large year-over-year decline has not been recorded since July 2014. Further, this is the lowest April reading since 2007. Year-to-date, this labor market barometer has fallen by 1.9 percent.

The unemployment insurance benefit exhaustion rate in Nevada, which shows the percentage of claimants who have run out of benefits prior to finding a job, has consistently improved since its peak level in January 2010. April's value of 41.2 percent is the lowest Nevada has experienced in the last 81 months. Relative to the rest of the United States, Nevadans have exhausted their benefits at a higher rate for all but one month out of the last 90. This is largely due to Nevada being more severely impacted than the rest of the country by the economic downturn. On a positive note, the gap between Nevada's and the national exhaustion rate, once more than nine percent, has shrunk to below two percentage points.

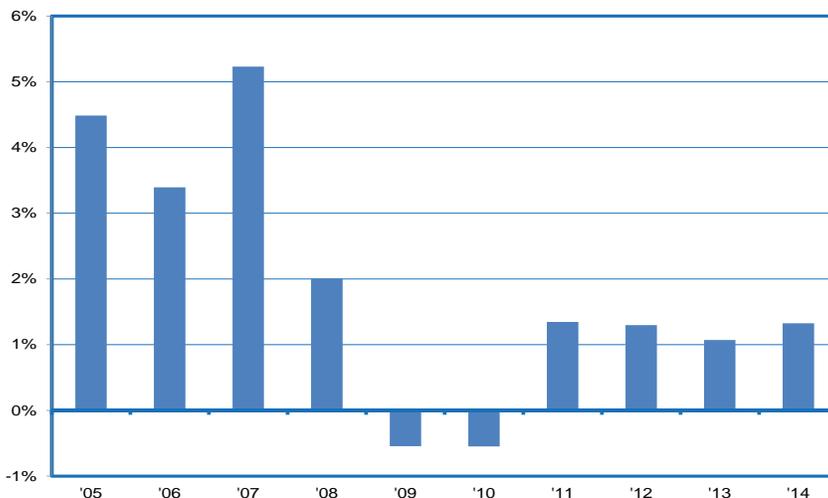
**Expanding Labor Force Limits Downward Pressure on the Unemployment Rate**  
Estimates of the 2015 YTD Unemp. Rate: Alternative LF Growth Scenarios (SA)



**Share of UI Claimants Exhausting Benefits has Eased Considerably**  
UI Benefits Exhaustion Rate



**Wages Expand for 4th-Straight Year; Consistent Growth at Just Below 1.5%**  
Avg. Weekly Wage Growth (Year-Over-Year)



# Economic Summary

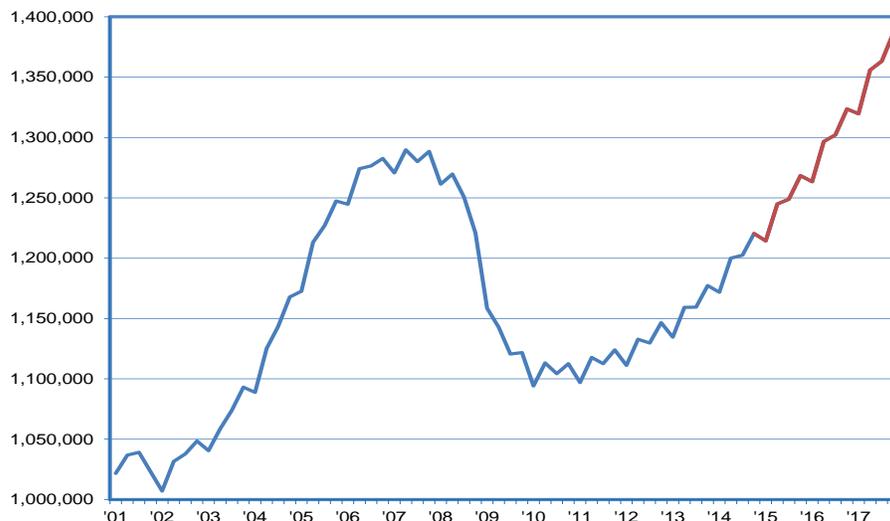
According to the Quarterly Census of Employment and Wages (QCEW)<sup>1</sup>, weekly wages in the Silver State averaged nearly \$900 in the final quarter of 2014, up 1.6 percent relative to the same period in 2013. This is the seventh consecutive quarter of year-over-year increase, and the highest IVQ reading on record. Further, for 2014 as a whole, weekly wages averaged \$860, another record for Nevada.

Concluding this month's Labor Market Overview, we are taking a look at Nevada's most recent employment projections presented to the Economic Forum and the Governor's Workforce Investment Board. Using Statewide QCEW information, employment levels are forecasted using standard time series techniques with monthly data. The final output is then averaged to quarterly values. These models are supplemented with "local knowledge," such as known construction and economic development projects, in finalizing the projections. The current forecast period is through 2017.

Our projections suggest that employment will surpass peak pre-recessionary job levels (achieved in 2007) in mid-2016. To put this in perspective, Nevada lost about 175,000 jobs (private and public sectors) from peak to trough. As of 2014:IIIQ, Nevada stands 6.7 percent (87,000 jobs) below the peak; however, job gains continued to accelerate into 2014. Job growth is projected to be 45,000 in 2015, 52,000 in 2016, and 60,000 in 2017.

<sup>1</sup> In the QCEW Program, the Research and Analysis Bureau collects and compiles employment and wage data for workers covered by Nevada unemployment insurance laws, and federal civilian workers covered by Unemployment Compensation for Federal Employees. The QCEW staff arranges the data by type of industry according to the North American Industry Classification System (NAICS). They assign each employing unit a NAICS code and location code. After screening the quarterly data, they transmit it to the Bureau of Labor Statistics (BLS). BLS combines all of the states' data for analysis of national economic trends and performance.

**Job Levels Exceed Pre-Recession Peak by 97K at Year-End 2017**  
Total Jobs: History and Forecast



# Sub-State Economic Summary

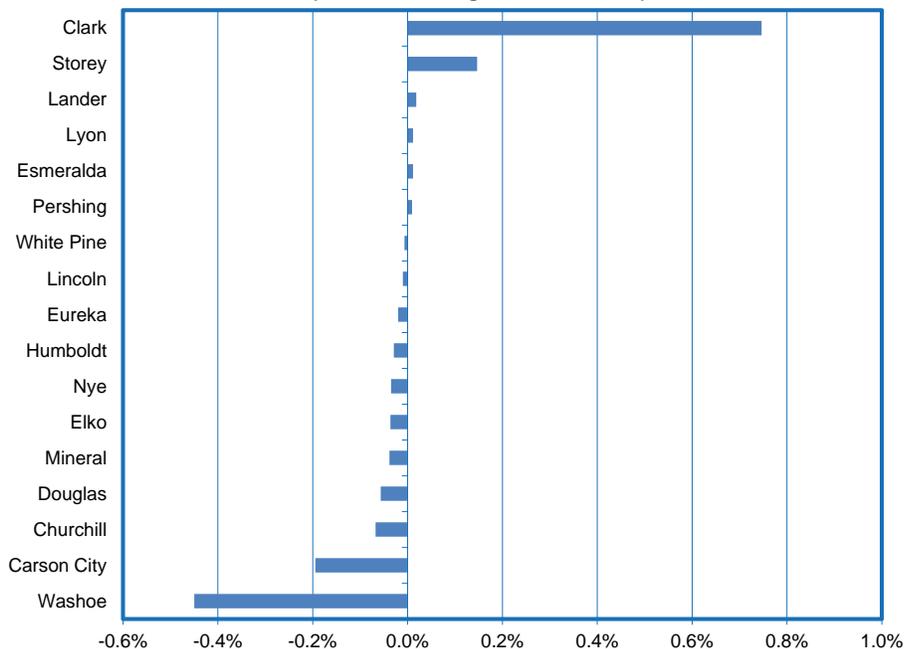
In April, Nevada's non-seasonally adjusted unemployment rate dropped to 7.1 percent, down from both the prior month and a year ago. This coincides with declines in all three of the State's metropolitan statistical areas (MSAs)<sup>1</sup>. The Las Vegas MSA dropped to 7.1 percent, down from 7.2 percent a month ago and eight percent last year. The Reno-Sparks MSA decreased by 0.2 percentage points to 6.7 percent in April; down from 7.8 percent a year ago. The Carson City MSA, which saw the largest over the year decline, dropped to 7.7 percent, down from 7.8 percent last month and nine percent last year.

County unemployment rates experienced mixed results this month, with only 13 of the 17 counties seeing year-over-year declines. Esmeralda County had the lowest rate in April, coming in at five percent, while Mineral County experienced the highest rate, at 11.6 percent. Although results may have been mixed in April, Nevada's counties have come a long way in the recovery when we consider historical trends. All 17 counties have seen a decline in their unemployment rate since the height of the recession.

The Silver State's two largest population centers both exceeded typical March-April job gains. Las Vegas added a seasonally adjusted 7,600 new jobs over the month. Specifically, 2,300 new jobs were expected based upon historical trends. However, 9,900 jobs were actually added,

<sup>1</sup> The State's seasonally adjusted unemployment rate is 7.1 percent in April, unchanged from March and down from 8.1 percent in April 2014. Unemployment rates for the State's metropolitan areas and counties reported here are not adjusted for seasonality. Hence, comparisons to the State's seasonally adjusted rate should be avoided. Legitimate comparisons, however, can be made to the State's unadjusted rate - 7.1 percent in April, down from 7.2 percent in March and down from 8.0 percent in April 2014.

**Employment Shares by County**  
(Absolute Change: 2010 vs. 2014)



resulting in the seasonally adjusted gain noted above. Relative to a year ago, job levels were up by 27,900 in April, a 3.2 percent gain.

Job gains are evident across nearly all industries in Southern Nevada. Goods-producing industries added 7,300 jobs relative to a year ago, with construction leading the way. In fact, specialty trade contractors added 5,900 new positions over the past 12 months. The metro area's private sector service-producers added 19,400 jobs to payrolls over the year. Leisure/hospitality employment is up 8,500 relative to 2014. Professional/business services added 3,700 jobs. Combined, retail/wholesale trade added 3,400 new positions.

Reno/Sparks had a seasonally adjust-

ed increase of 1,400 jobs, as monthly growth exceeded expectations. Employment grew by 3.4 percent (+6,900) over the year resulting in a total of 208,400 jobs. As goods-producing employment was relatively flat compared to a year ago, the metro area's service-producers accounted for the year-over-year gain. Trade/transportation/utilities accounted for 1,800 new jobs, slightly more than the 1,700 jobs attributable to the leisure/hospitality sector. Professional/business services came in with 1,300 new jobs compared to 2014.

In Carson City, payrolls were expected to increase by 100, but instead decreased by 100 jobs, leading to a seasonally adjusted decline of 200 jobs in April. Job levels are unchanged relative to 2014.

## Sub-State Economic Summary

In Nevada as a whole, job levels increased by a seasonally adjusted 12,800 in April, relative to March. This translates into the strongest month-to-month gain since April 2005. Relative to a year ago, payrolls stand 41,400 higher.

An analysis of job trends over the 2010-2014 recovery period, utilizing information from the Quarterly Census of Employment and Wages (QCEW) Program<sup>2</sup>, highlights the relative performance of each of Nevada's 17 counties. In the State as a whole, job levels grew by approximately 95,000 over the first four years of recovery, an 8.5 percent gain. All told, six counties grew at a faster rate and, as a result, increased their relative share of total State employment. For instance, Clark County accounted for 72.3 percent of all jobs in Nevada in 2010. Over the next four years, employment expanded at 9.7 percent, slightly more pronounced than the statewide average. As a result, in 2014, the region accounted for 73 percent of all jobs. This translates into a 0.7 percentage point increase in job share<sup>3</sup>.

Washoe County, on the other hand, accounted for 16.7 percent of all Nevada jobs in 2010. During the next four years, job levels grew 5.6 percent, a bit below the Statewide average. As a result, the region accounted for 16.2 percent of all jobs in the Silver State in

2014. All told, the County's share of State jobs fell 0.5 percentage point.

In total, six counties in Nevada grew at a more pronounced rate than did the Silver State as a whole, realizing an increase in job share between 2010 and 2014. Eight counties realized job growth over the four-year period, but at a pace less than the average for Nevada as a whole. As a result, they saw their share of Nevada jobs decline. Finally, three counties experienced job losses over the period, and also saw their share of total statewide jobs fall.

<sup>2</sup> In the QCEW Program, the Research and Analysis Bureau collects and compiles employment and wage data for workers covered by Nevada unemployment insurance laws, and federal civilian workers covered by Unemployment Compensation for Federal Employees. The QCEW staff arranges the data by type of industry according to the North American Industry Classification System (NAICS). They assign each employing unit a NAICS code and location code. After screening the quarterly data, they transmit it to the Bureau of Labor Statistics (BLS). The BLS combines all of the states' data for analysis of national economic trends and performance.

<sup>3</sup> The change in job share is calculated as the absolute difference between job shares in 2014 vs. 2010.

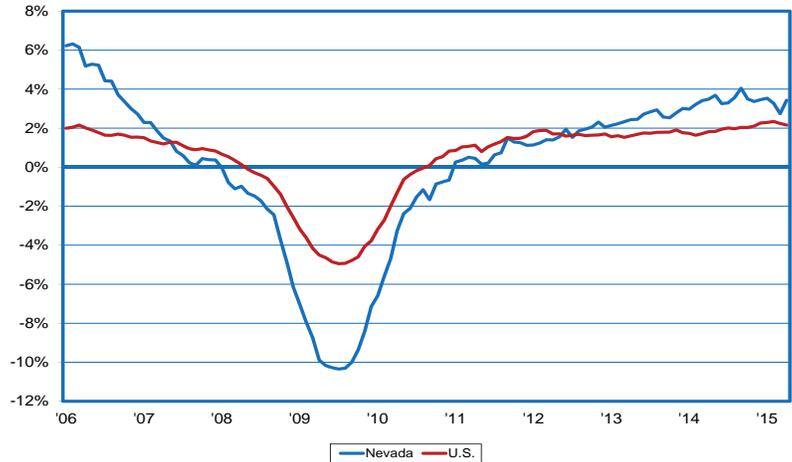
# Trends at a Glance

## Industrial Employment

**April**

- Nevada = 3.4 percent
- U.S. = 2.2 percent
- March marks 52 straight months of growth in Nevada.
- Growth in Nevada has exceeded that of the U.S. for 33 straight months.

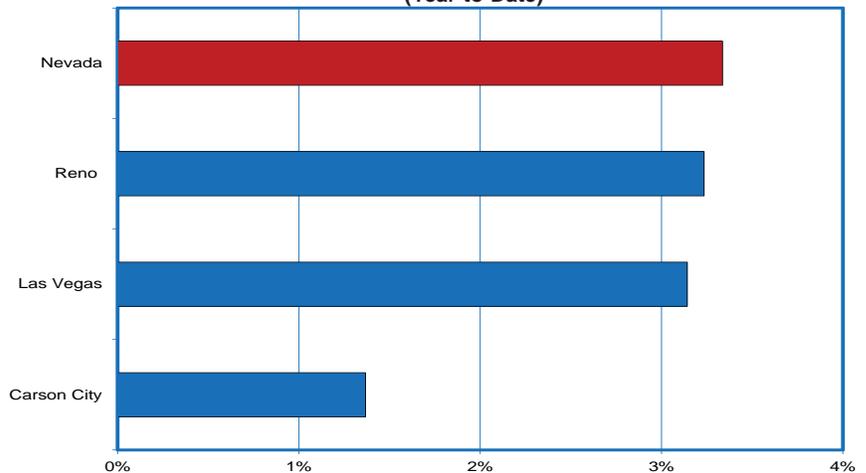
**Job Growth: Nevada vs. U.S.**  
(Year-Over-Year Percent Change; Seasonally Adjusted)



**April**

- Reno-Sparks MSA = 3.2 percent
- Las Vegas-Paradise MSA = 3.1 percent
- Carson City = 1.4 percent

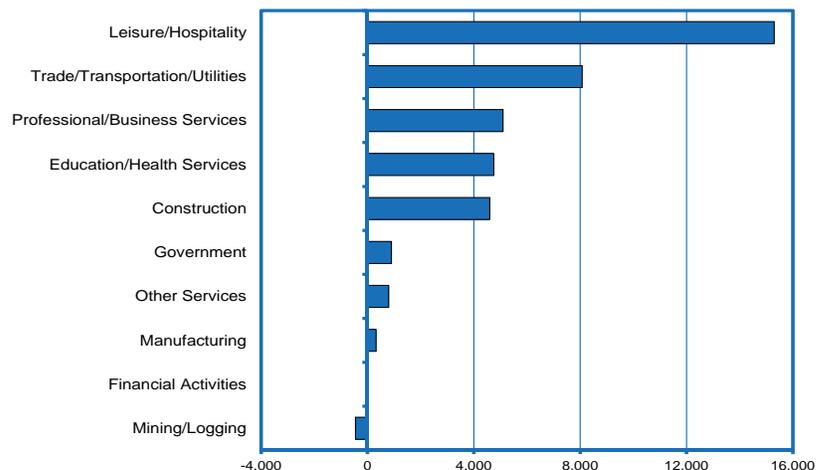
**Job Growth by Region**  
(Year-to-Date)



**April**

- Leisure/hospitality added 15,300 jobs, more than any other sector.
- Nine sectors added jobs through April; only mining/logging contracted.
- Total job growth = 39,400 jobs.

**Job Growth by Industry**  
(Year-to-Date)



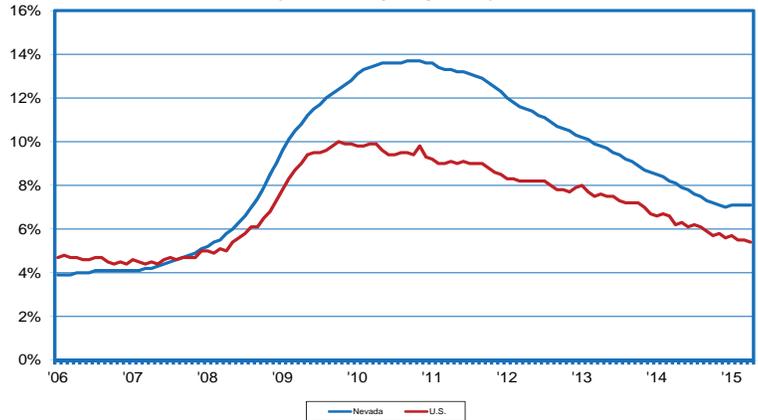
# Trends at a Glance

## Unemployment

### April

- Nevada = 7.1 percent; unchanged from March; down from 8.1 percent a year ago.
- U.S. = 5.4 percent; down from 5.5 percent in March; down from 6.2 percent a year ago.
- 1.7 point gap between Nevada and the Nation, compare to 4.4 points at the height of the recession.

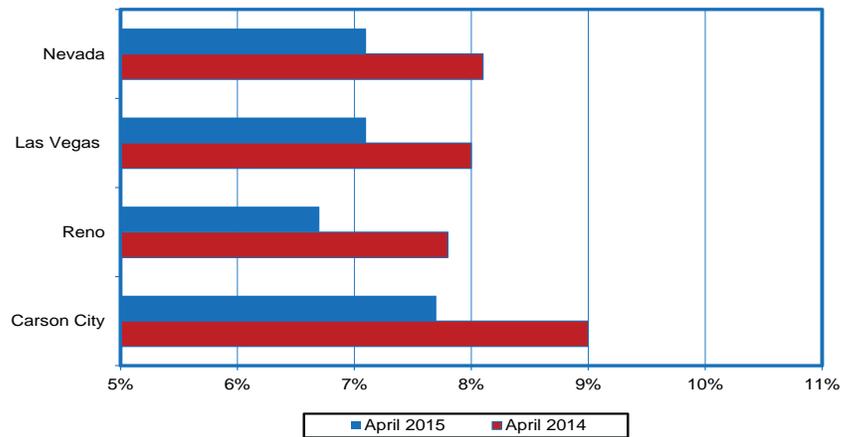
**Unemployment Rate: Nevada vs. U.S.**  
(Seasonally Adjusted)



### April (Not Seasonally Adjusted)

- Nevada = 7.1 percent; down 1.0 percentage points from April 2014.
- Las Vegas-Paradise MSA = 7.1 percent; down 0.9 percentage point from April 2014.
- Reno-Sparks MSA = 6.7 percent; down 1.1 percentage points from April 2014.
- Carson City = 7.7 percent; down 1.3 percentage points from April 2014.

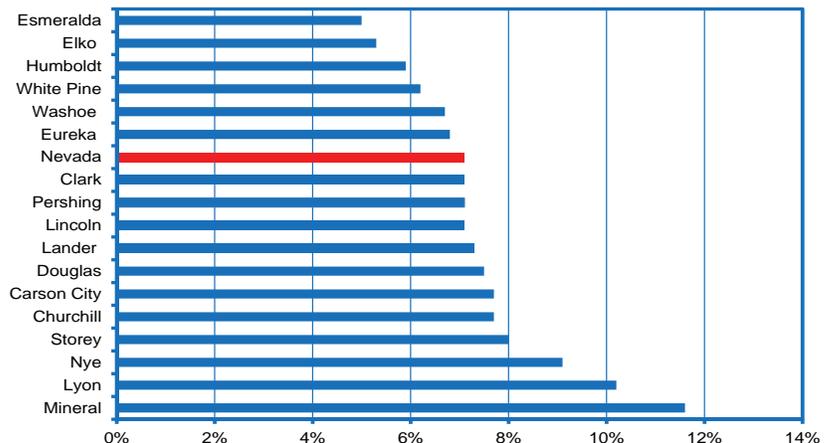
**Unemployment Rate by Metro Area**



### April (Not Seasonally Adjusted)

- Unemployment rates ranged from 11.6 percent (Mineral) to five percent (Esmeralda).
- Clark = 7.1 percent; Washoe = 6.7 percent; Carson City = 7.7 percent.

**Unemployment Rate by County**



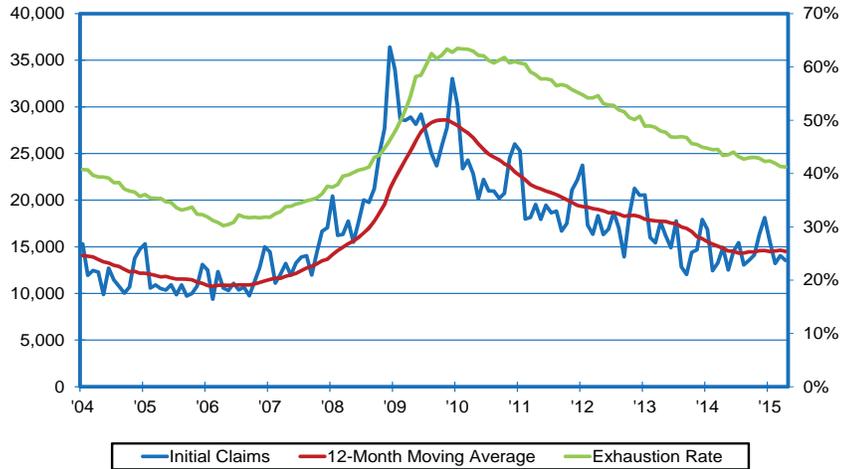
# Trends at a Glance

## Unemployment

### April

- Initial claims = 13,600
- Exhaustion rate (the percentage of unemployment insurance claimants who exhausted UI benefits prior to finding a job) = 41.2 percent

Nevada Unemployment Insurance: Initial Claims and Exhaustion Rate



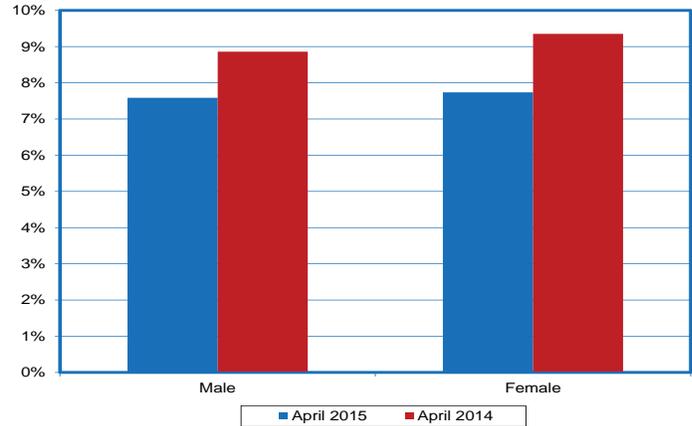
# Trends at a Glance

## Demographics of the Unemployed

### April

- Male unemployment rate = 7.6 percent; up 0.2 percentage points from March; down 1.3 percentage points from a year ago.
- Female unemployment rate = 7.7 percent; unchanged from March; down 1.7 percentage points from a year ago.

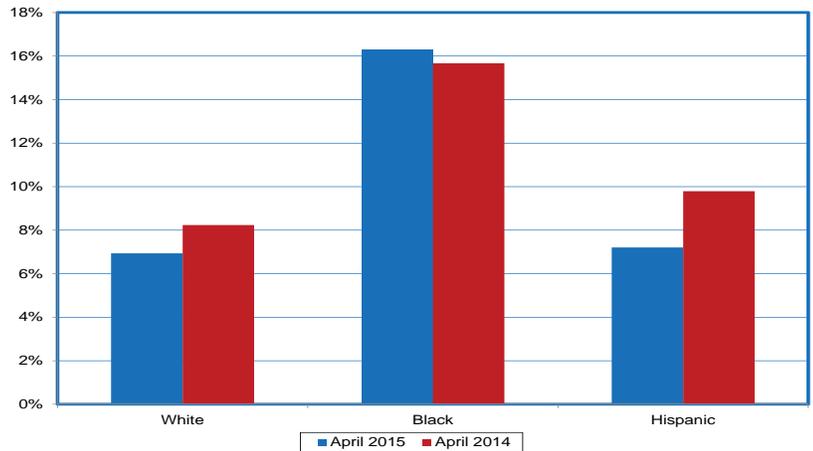
**Unemployment Rate by Gender**  
(12-Month Moving Average)



### April

- White unemployment rate = 6.9 percent; down 0.1 percentage point from March; down 1.3 percentage points from a year ago.
- Black unemployment rate = 16.3 percent; up 0.1 percentage point from March; up 0.6 percentage points from a year ago.
- Hispanic unemployment rate = 7.2 percent; up 0.1 percentage point from March, down 2.6 percentage points from a year ago.

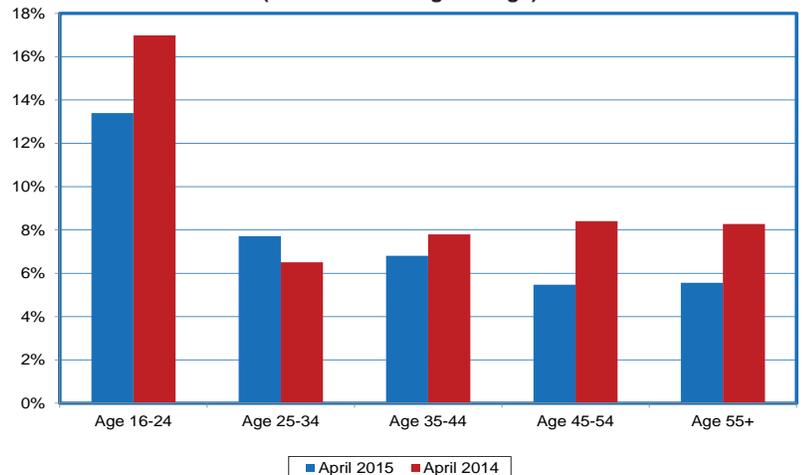
**Unemployment Rate by Ethnicity**  
(12-Month Moving Average)



### April

- Age 16-24 unemployment rate = 13.4 percent; down 0.2 percentage point from March; down 3.6 percentage points from a year ago.
- Age 25-34 unemployment rate = 7.7 percent; up 0.3 percentage point from March; up 1.2 percentage points from a year ago.
- Age 35-44 unemployment rate = 6.8 percent; unchanged from March; down one percentage point from a year ago.
- Age 45-54 unemployment rate = 5.5 percent; up 0.1 percentage point from March; down 2.9 percentage points from a year ago.
- Age 55+ unemployment rate = 5.6 percent; unchanged from March; down 2.7 percentage points from a year ago.

**Unemployment Rate by Age Group**  
(12-Month Moving Average)



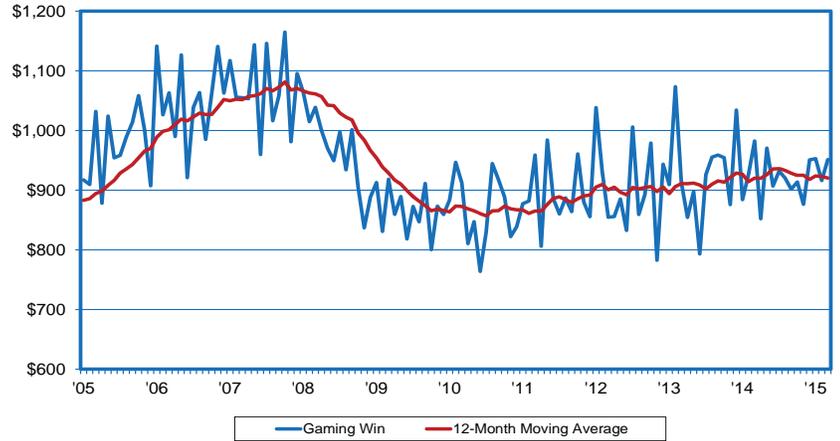
# Trends at a Glance

## Economic Indicators

### March

- Gaming win = \$951.2 million
- Down 3.1 percent year-over-year; up 1.0 percent year-to-date.

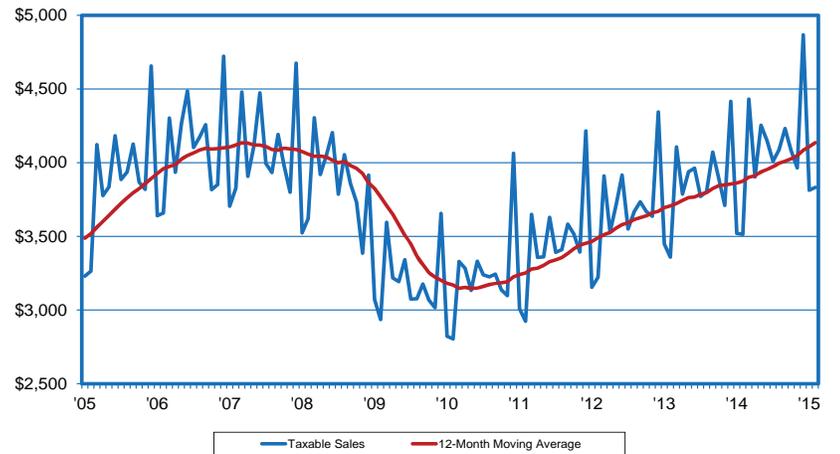
**Nevada Gross Gaming Win**  
(Millions of Dollars)



### February

- Taxable sales = \$3.83 billion
- Up 9.1 percent year-over-year

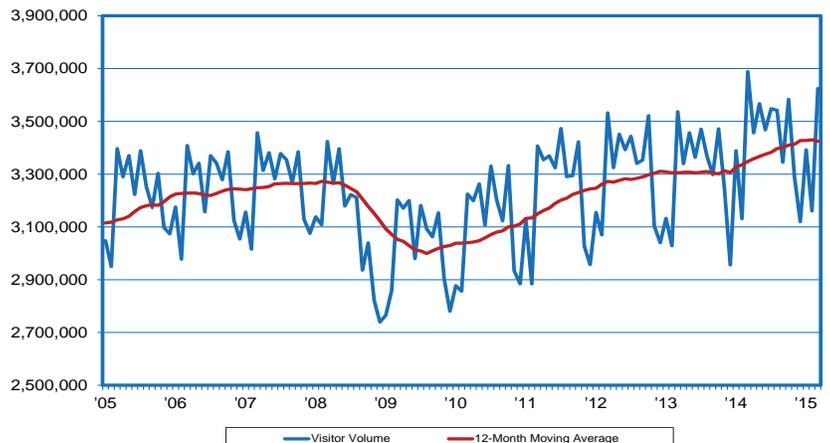
**Statewide Taxable Sales**  
(Millions of Dollars)



### March

- 3,624,600 visitors
- 63,800 visitor decrease from prior year (-1.7 percent); down 0.3 percent year-to-date over 2014.

**Las Vegas Visitor Volume**

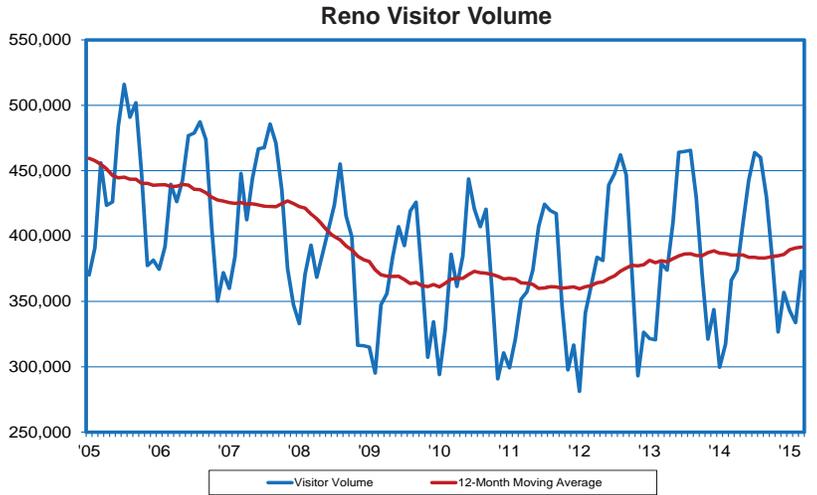


# Trends at a Glance

## Economic Indicators

### March

- 372,900 visitors
- 6,700 visitor increase from prior year (+1.8 percent); up 6.8 percent year-to-date over 2014.



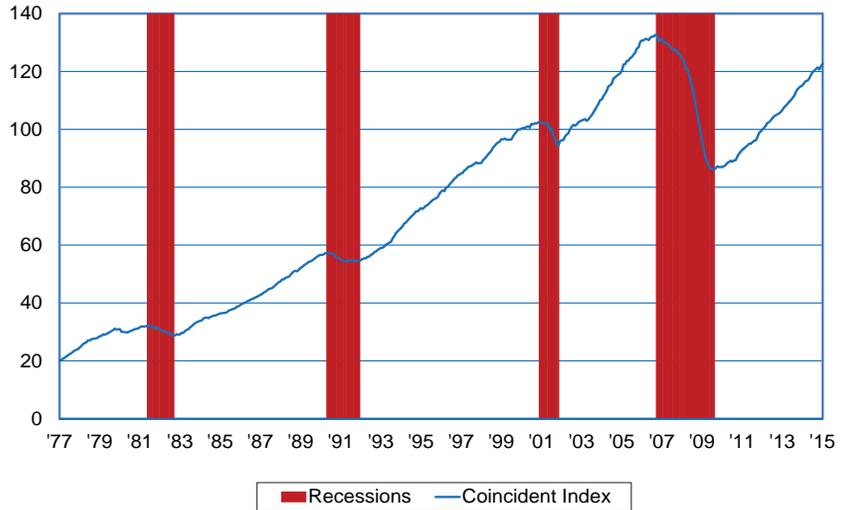
# Trends at a Glance

## CBER-DETR Nevada Coincident and Leading Employment Indexes

### March

- The Nevada Coincident Employment Index measures the ups and downs of the Nevada economy using an index of employment variables. The peak of the last employment cycle in Nevada occurred in December 2006. The coincident index then regressed steadily through October 2009, where the coincident index reached a bottom.
- The March release conveys a positive story for the coincident index and a mixed story for the leading index on a year-over-year basis. For the coincident index, the unemployment rate (inverted), household employment, nonfarm employment, and the insured unemployment rate (inverted) all moved in a positive direction.
- For the coincident index, nonfarm employment, and insured unemployment rate (inverted) moved in a positive direction while the unemployment rate (inverted) and household employment moved in a negative direction.

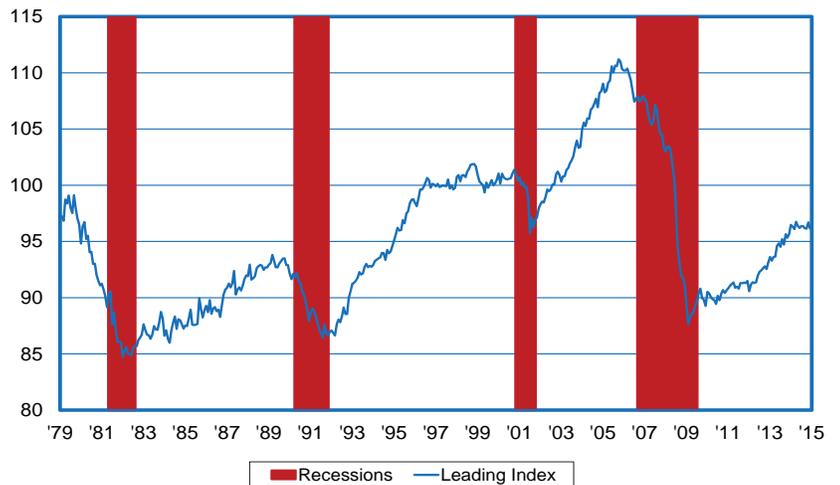
CBER-DETR Nevada Coincident Employment Index



### March

- The Nevada Leading Employment Index provides a signal about the future direction of the coincident index. For example, for Nevada's most recent employment recession, the leading index provided a clear signal by peaking in January 2006, eleven months before the coincident index reached its peak, and reached a bottom in May 2009, five months before the coincident index reached its bottom.
- For the leading index, the short-duration unemployment rate (inverted) and construction employment moved in a positive direction while the real Moody's Baa bond rate (inverted), housing permits, commercial permits, and initial claims for unemployment insurance (inverted) moved in a negative direction.
- For the leading index, the short-duration unemployment rate (inverted), real Moody's Baa bond rate (inverted), and construction employment moved in a positive direction while the housing permits, commercial permits, and initial claims for unemployment insurance (inverted) moved in a negative direction.

CBER-DETR Nevada Leading Employment Index



# Economy In Brief

## *Research & Analysis Bureau*

The Nevada Economy in Brief provides a wealth of Nevada workforce and economic information and is published monthly by the Nevada Department of Employment, Training and Rehabilitation / Research and Analysis Bureau. Material contained in this publication is produced in cooperation with the U.S. Department of Labor (the Bureau of Labor Statistics and the Employment and Training Administration) and may be reproduced without permission. Please credit the Nevada Department of Employment, Training and Rehabilitation. For additional workforce or other economic information, a free subscription to the Nevada Economy in Brief, or to change your e-mail address, please contact the Research and Analysis Bureau.

Don Soderberg, Director  
Bill Anderson, Chief Economist  
Christopher Robison, Supervising Economist

Prepared by the Research and Analysis Bureau

Phone: (775) 684-0450	<a href="http://nevadaworkforce.com">nevadaworkforce.com</a>
Fax: (775) 684-0342	<a href="http://nevadajobconnect.com">nevadajobconnect.com</a>
E-mail: <a href="mailto:detr1mi@nvdetr.org">detr1mi@nvdetr.org</a>	<a href="http://nvdetr.org">nvdetr.org</a>
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