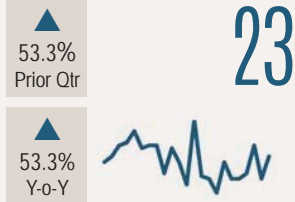


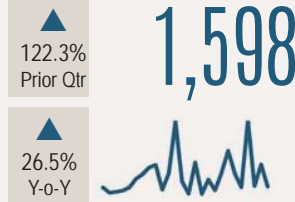
QUARTERLY PERFORMANCE REPORT

Q2 2018

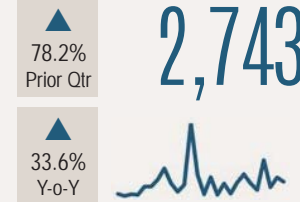
NUMBER OF
ASSISTED COMPANIES
Q1 2018



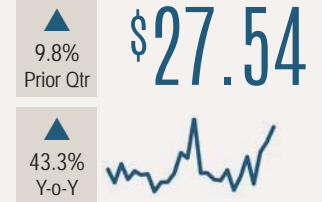
INITIAL JOBS FROM
ASSISTED COMPANIES
Q1 2018



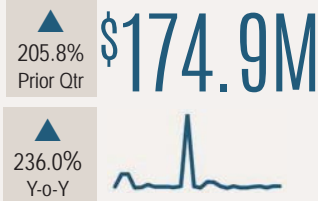
NUMBER OF
BUILD OUT JOBS
Q1 2018



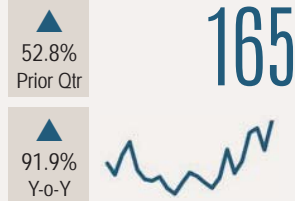
AVERAGE WAGE PAID BY
ASSISTED COMPANIES
Q1 2018



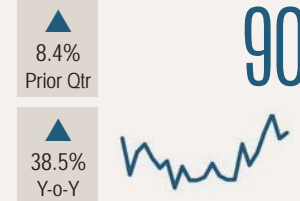
ASSISTED COMPANY
INVESTMENTS
Q1 2018



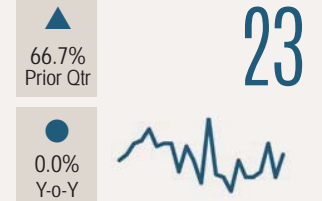
NUMBER OF LEADS
Q1 2018



NUMBER OF PROSPECTS
Q1 2018

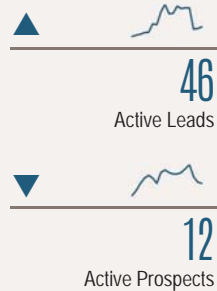


NUMBER OF WINS
Q1 2018



DIVISIONS

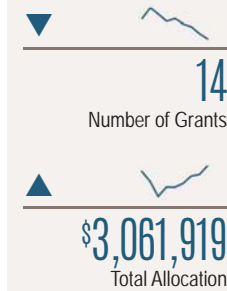
Q1 2018
GLOBAL
ENGAGEMENT



JUL - DEC 2017
EMERGING
SMALL BUSINESS
PROGRAM



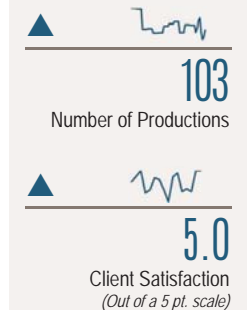
2018
COMMUNITY
DEVELOPMENT
BLOCK GRANTS



Q3 FY18
PROCUREMENT
TECHNICAL
ASSISTANCE
CENTER



Q4 FY18
NEVADA
FILM OFFICE



JOBS ANNOUNCED BY ASSISTED COMPANIES

There were 35 assisted companies reported in the first half of 2018. Of these, 21 are new to Nevada and 14 are existing companies expanding operations. These companies are expected to add 2,294 jobs to our economy in the next two years and to more than double that count once they are fully staffed.

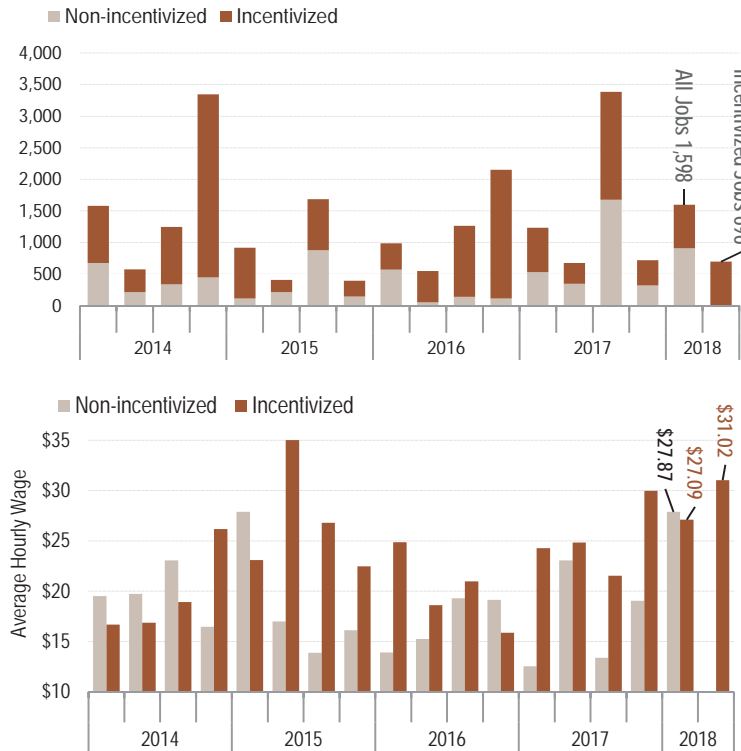
Of the 35 companies, 34 percent were manufacturers followed by logistics and operations (33 percent), and information technology (11 percent). The remaining 20 percent were essentially evenly split between the aerospace, tourism, healthcare, and finance sectors.

WAGES PAID BY ASSISTED COMPANIES

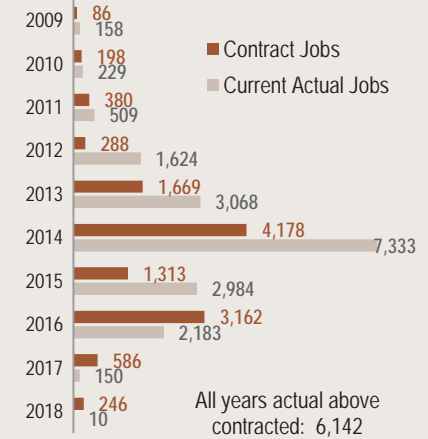
The average hourly wage paid by companies assisted this year stands at \$28.59. This reflects a \$7.71 improvement over what it was for the same period last year when they stood at \$20.88.

ANNUAL ASSISTED COMPANY STATISTICS

	ALL COMPANIES				INCENTIVIZED COMPANIES					NON-INCENTIVIZED COMPANIES					
	COMPANIES	INITIAL JOBS	BUILD-OUT JOBS	AVERAGE WAGE	CAPITAL INVESTMENT	COMPANIES	INITIAL JOBS	BUILD-OUT JOBS	AVERAGE WAGE	CAPITAL INVESTMENT	COMPANIES	INITIAL JOBS	BUILD-OUT JOBS	AVERAGE WAGE	CAPITAL INVESTMENT
2012	71	2,130	2,494	\$19.98	\$2,230,592,312	19	762	1,111	\$20.22	\$1,136,341,201	52	1,368	1,383	\$19.85	\$1,094,251,111
2013	106	4,363	9,602	\$18.50	\$590,733,144	48	2,902	7,867	\$18.68	\$469,574,739	58	1,461	1,735	\$18.14	\$121,158,405
2014	94	6,747	14,284	\$20.75	\$5,675,338,900	29	5,070	11,878	\$21.14	\$5,431,594,324	65	1,677	2,406	\$19.43	\$243,744,576
2015	86	3,406	7,186	\$22.62	\$5,116,142,613	53	2,056	5,465	\$27.15	\$5,061,620,607	33	1,350	1,721	\$15.77	\$54,522,006
2016	60	4,956	8,057	\$17.99	\$728,622,702	33	4,080	6,368	\$18.52	\$706,798,202	27	876	1,689	\$15.52	\$21,824,500
2017	74	6,014	9,681	\$19.48	\$400,746,189	35	3,137	5,866	\$23.56	\$307,922,272	39	2,877	3,815	\$15.03	\$92,823,917
2018 YTD	35	2,294	4,958	\$28.59	\$533,892,524	25	1,387	3,750	\$29.07	\$441,434,974	10	907	1,208	\$27.87	\$92,457,550



CONTRACT AND ACTUAL JOBS BY NEW INCENTIVIZED COMPANIES

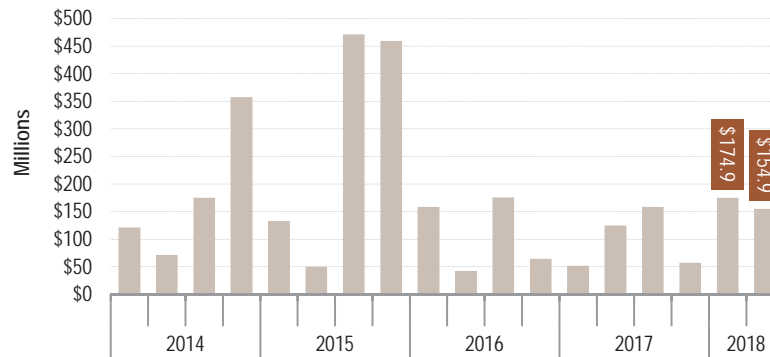


As new incentivized companies add staff, the number of actual jobs has exceeded those that were contracted.

ASSISTED COMPANY INVESTMENT

Capital investment by the 35 companies assisted this year currently stands at \$329.8 million. This reflects a \$153.2 million, or 86.7 percent improvement over what it was the same period last year.

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



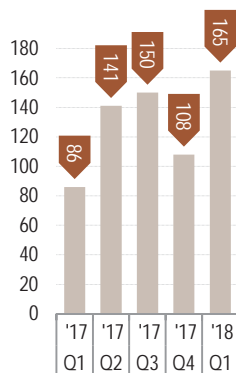
RECRUITMENT ACTIVITY

2017 Q1 - 2018 Q1

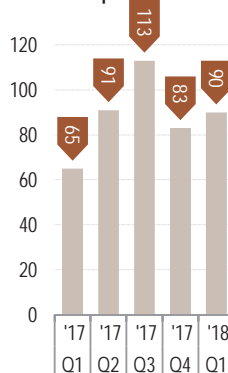
There were 23 wins in the first quarter of 2018. This represents a 53.3 percent increase from both the previous quarter and the first quarter of 2017.

Activity in the earlier stages of the recruitment pipeline also showed marked improvement. When compared to last quarter, New Leads and Prospects were up by 52.8 and 8.4 percents, respectively; when compared to last year, they were up by 91.9 and 38.5 percents, respectively.

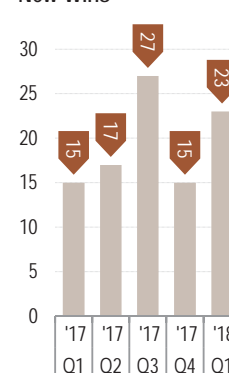
NEW LEADS



NEW PROSPECTS

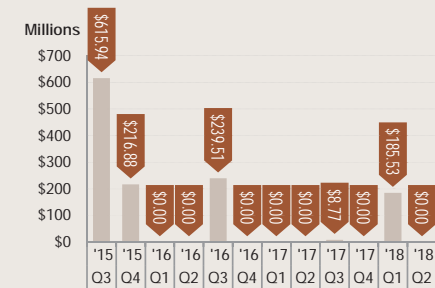


WINS



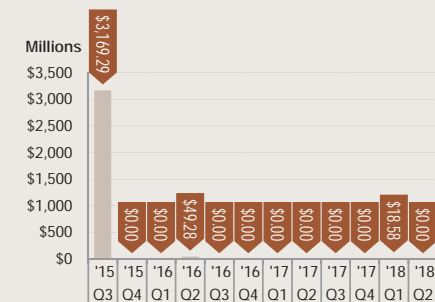
CAPITAL INVESTMENT BY ASSISTED AVIATION AND DATA CENTER COMPANIES

AVIATION COMPANIES



This year two companies applied for Aviation Tax Abatements with a combined capital investment of \$185.5 million. Since July 2015, there have been 18 aviation companies approved for the abatement. In total, these companies are expected to invest \$1.3 billion.

DATA CENTERS



One company applied for the Data Center Tax Abatement so far this year. Since inception in July 2015, total capital investment by the five companies approved for Data Center abatements stands at \$3.2 billion.

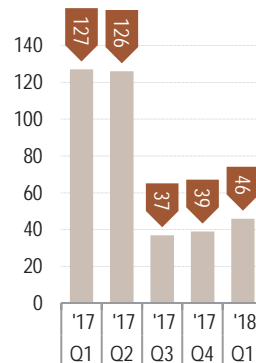
GLOBAL RECRUITING: Q1 2018

In the first quarter, there were an additional 10 leads and two prospects added to the Global Recruiting Pipeline.

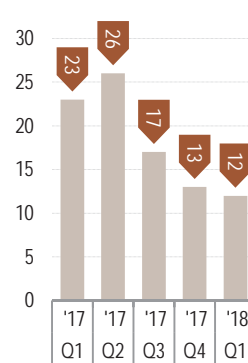
After removing those which have become inactive, the current inventory of all active global leads and prospects now stands at 46 and 12, respectively.

There were no new wins in the first quarter.

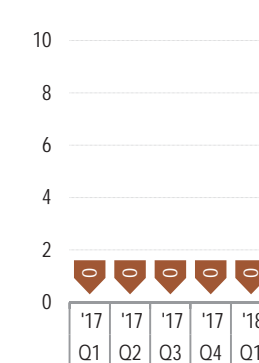
ACTIVE LEADS



ACTIVE PROSPECTS



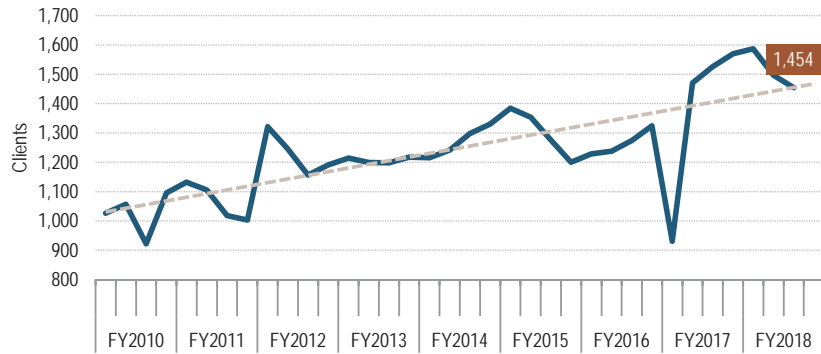
WINS



INTERNATIONAL TRADE

- » In January, the International Trade Division (ITD) attended the Consumer Electronics Show (CES) to meet with companies and exhibitors interested in deepening business relationships in Nevada as well as representatives from the governments of the Netherlands, Mexico, and Quebec. Following the show, the ITD hosted an inbound delegation from Turkey representing a Turkish company looking to connect with existing Nevada businesses. While in the state they visited a number of potential site locations.
- » In February, the ITD hosted a visit from the Republic of South Africa's Department of Trade and Industry. The purpose of the meeting was to follow up on a previous exploratory trip to South Africa and to continue planning for the Governor-led trade mission to South Africa. The discussions focused on trade and investment opportunities, as well as plans to include delegates from the hospitality and water sectors.
- » Also in February, the ITD helped facilitate an in-bound trade delegation from Alberta, Canada. The delegation included over 50 businesses and 100 delegates who met and connected with Nevada business leaders, policy makers, and investors. The focus of the mission was on advanced industries and innovation, energy and sustainability, and tourism and hospitality in both Reno and Las Vegas.
- » In March, the Trade Commission of the Embassy of Spain in Los Angeles made an official visit to Las Vegas and Carson City. They met with representatives from the energy, infrastructure, transportation, and smart cities programs to learn about current projects and challenges faced.
- » During the first quarter, seven Nevada Eligible Small Business Concerns completed export sales activities using financial assistance made through the State Trade Expansion Program Grant. These grants are administered by GOED in cooperation with the U.S. Small Business Administration.

PROCUREMENT TECHNICAL ASSISTANCE CENTER



	PRIME CONTRACT AWARDS				SUBCONTRACT AWARDS		
	CLIENTS	NO.	AMOUNT	AVERAGE	NO.	AMOUNT	AVERAGE
FY 2012	1,229	232	\$27,806,562	\$119,856	46	\$27,207,340	\$591,464
FY 2013	1,207	272	\$81,759,231	\$300,585	23	\$4,013,194	\$174,487
FY 2014	1,271	395	\$56,083,310	\$141,983	47	\$6,030,228	\$128,303
FY 2015	1,303	338	\$67,021,273	\$198,288	31	\$7,260,074	\$234,196
FY 2016	1,266	366	\$42,579,799	\$116,338	38	\$9,634,197	\$253,532
FY 2017	1,375	662	\$129,047,457	\$194,936	43	\$4,326,685	\$100,621
FYTD 2018	1,454	963	\$286,684,257	\$297,699	49	\$14,222,738	\$290,260

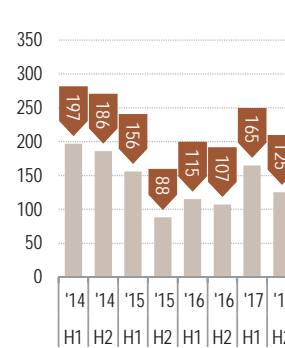
PROCUREMENT TECHNICAL ASSISTANCE CENTER

OVERVIEW FYTD2018

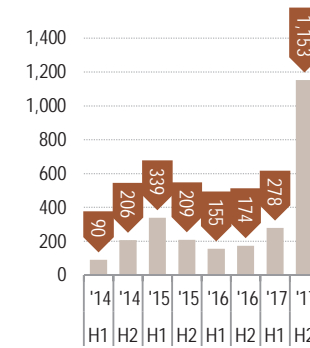
- » Performance activity for the Nevada Procurement Technical Assistance Center (PTAC) through the first nine months of this fiscal year has been exceptionally strong. Year-to-date, the number of contracts is already 43.5 percent above last year's total and the contract amount even greater at 125.6 percent. The number of clients has slipped slightly in the most recent quarter, but the year-to-date average is still well above historic annual counts.
- » The Nevada PTAC credits much of its recent success to resource partners like the U.S. Small Business Administration, the Nevada Department of Business and Industry, the Nevada Small Business Development Center, and local chambers of commerce in promoting their free counseling services, training seminars, and networking events.

EMERGING SMALL BUSINESS PROGRAM

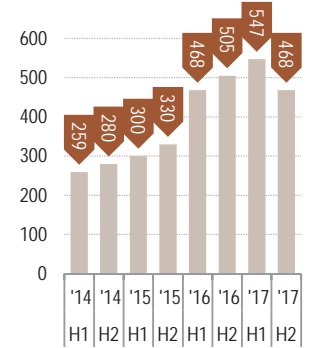
BUSINESSES CERTIFIED



BUSINESSES SOLICITED



CONTRACTS AWARDED



	BUSINESSES CERTIFIED	BUSINESSES SOLICITED	CONTRACTS		
			NUMBER	AMOUNT	AVERAGE
January - June 2014	197	90	259	\$919,458	\$3,550
July - December 2014	186	206	280	\$1,847,251	\$6,597
January - June 2015	156	339	300	\$2,059,812	\$6,866
July - December 2015	88	209	330	\$2,897,894	\$8,781
January - June 2016	115	155	468	\$3,671,437	\$7,845
July - December 2016	107	174	505	\$5,721,589	\$11,330
January - June 2017	165	278	547	\$4,497,936	\$8,223
July - December 2017	125	1,153	468	\$5,635,402	\$12,041

EMERGING SMALL BUSINESS PROGRAM

OVERVIEW

- » In 2017, the number of Certified Emerging Small Businesses (ESB's) expanded by 34.2 percent and now stands at 1,139.
- » For the year, the number of ESB's solicited to submit a quote, bid, or proposal on a contract improved by 335.0 percent when compared to 2016. This significant growth was largely the result of a broad outreach campaign by the Clark County School District.
- » From 2016 to 2017, the number, amount, and average contract amount grew by 4.3, 7.9, and 3.4 percents, respectively.

NEVADA FILM OFFICE

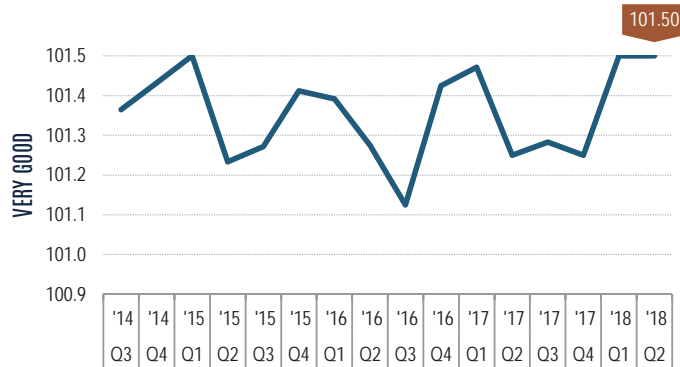
NEVADA FILM OFFICE ANNUAL PRODUCTION REVENUE*

FISCAL YEAR	NUMBER OF PRODUCTIONS	REVENUE*
2005	789	\$120,208,978
2006	776	\$102,945,418
2007	425	\$113,748,400
2008	436	\$82,727,400
2009	361	\$91,900,600
2010	367	\$81,130,250
2011	479	\$102,525,600
2012	520	\$88,783,700
2013	559	\$67,571,708
2014	370	\$58,716,755
2015	500	\$65,159,732
2016	495	\$73,160,712
2017	501	\$40,134,588
2018YTD	333	\$50,066,857

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

CLIENT SATISFACTION INDEX

100=AVERAGE



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

Over the past two quarters, customers responded with perfect scores to the Nevada Film Office Client Satisfaction Survey. Only once before in 2014 was customer satisfaction with the NFO this high.

The Index is an aggregate measure on how customers rated their experience on availability, responsiveness, knowledge, willingness to help, and overall level of service. Since inception in 2014, client responses to the Nevada Film Office's Satisfaction Survey have consistently been very good.

SIGNIFICANT PROJECTS* FY2018 YTD

PROJECT	PROJECT TYPE
7 Days Alive	TV Series
Who Wants To Be A Millionaire - Season 16	TV Series
Mustang	Feature Film (Independent)
American Ninja Warrior	TV Series
Latin Billboard Music Awards	Other
2017 Miss Universe	Other
Gloria	Feature Film (Independent)
Smiley Face Killers	Feature Film (Independent)
Vegas Cakes Season 2	Reality TV
Asics "As I Move Me"	Commercial
The Broken Star	Feature Film (Independent)

*More than \$1,000,000 in local production expenditures.

COMMUNITY DEVELOPMENT BLOCK GRANTS

2018 GRANTS

- » Fourteen grants totaling \$3,524,603
- » Rural Nevada: Nine grants with a total allocation of \$3,061,919
- » Urban Nevada: Five grants with a total allocation of \$462,684

RURAL COMMUNITY DEVELOPMENT BLOCK GRANTS

YEAR	NUMBER OF GRANTS	ALLOCATION	AVERAGE GRANT AWARD	PERCENT ECONOMIC DEVELOPMENT
2011	32	\$2,612,161	\$81,630	17%
2012	27	\$2,170,726	\$80,397	13%
2013	22	\$2,445,704	\$111,168	9%
2014	24	\$2,439,168	\$101,632	22%
2015	20	\$2,544,500	\$127,225	84%
2016	18	\$2,759,320	\$153,296	61%
2017	13	\$2,803,961	\$215,689	75%
2018	9	\$3,061,919	\$340,213	87%

RURAL GRANT PROGRESS

- » Through the first six months of 2018, \$620,539 was paid to five rural counties and one rural city.
- » CDBG staff closed eight grant projects representing a CDBG investment of \$849,560. These projects leveraged \$790,784 in local funds and \$49,702 in in-kind match.
- » Closed grant projects assisted 6,577 Nevadans of which 4,601 (70.0 percent) were considered Low to Moderate Income (below 80 percent of area median income).
- » There are currently 23 open rural grants: three from 2016, 11 from 2017, and 9 from this year's program funds.

URBAN COMMUNITY DEVELOPMENT BLOCK GRANTS

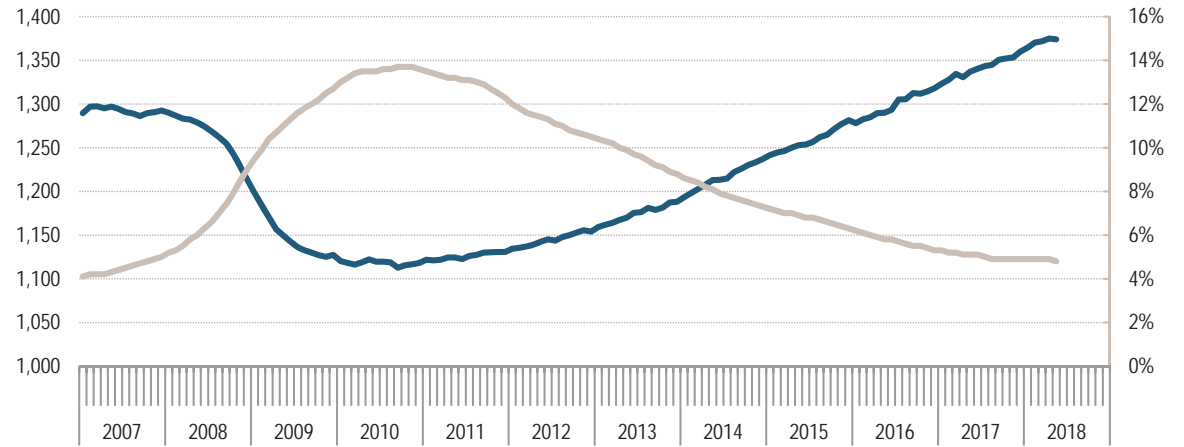
- » In 2017, Carson City reverted to the state's CDBG program. As an Entitlement program, Carson City's focus is urban with different priorities than that of the GOED-CDBG rural programs.
- » The Carson City Advisory Committee awarded five projects with an average award of \$92,573.

NEVADA JOBS AND UNEMPLOYMENT

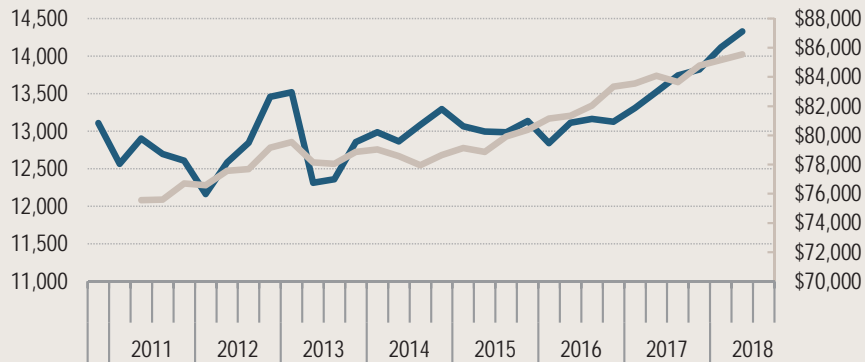
The number of workers in Nevada's economy continues to set record levels and currently stands at 1,374,200. This reflects a gain of 261,600 jobs since the recessionary low and 76,900 above the pre-recession high. Nevada currently has the fastest private sector job growth in the country.

The unemployment rate currently stands at 4.8 percent; a 0.3 percentage point improvement from this time last year and 8.9 points below the recessionary high of 13.7 percent. The prerecession unemployment low was 3.9 percent.

— Jobs (in thousands) — Unemployment Rate

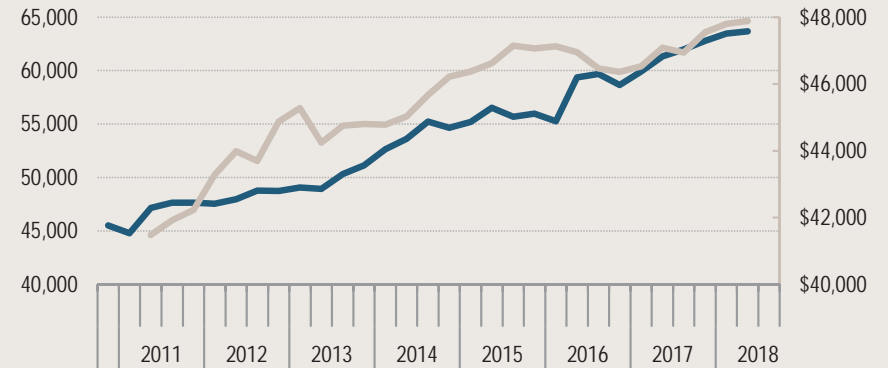


AEROSPACE AND DEFENSE



With the addition of 210 jobs, there are currently 14,300 workers employed in Nevada's Aerospace and Defense sector. Average annual earnings also improved by \$380 and now stand at \$85,500. When compared to last year, there has been a 5.9 percent increase in jobs and a 1.8 percent increase in earnings.

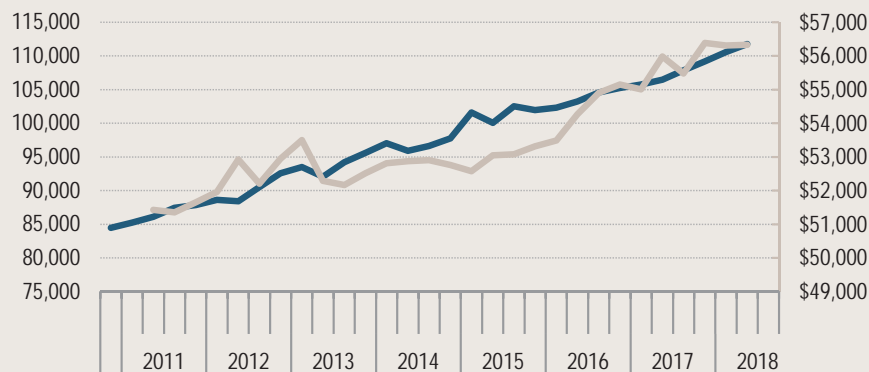
BUSINESS INFORMATION TECHNOLOGY



The number of jobs in Nevada's Business Information Technology sector expanded in the second quarter with the addition of 220 positions. Average earnings were essentially unchanged with only a slight improvement of \$80 per year. For the year, job counts have improved by 3.8 percent and earnings by 1.7 percent.

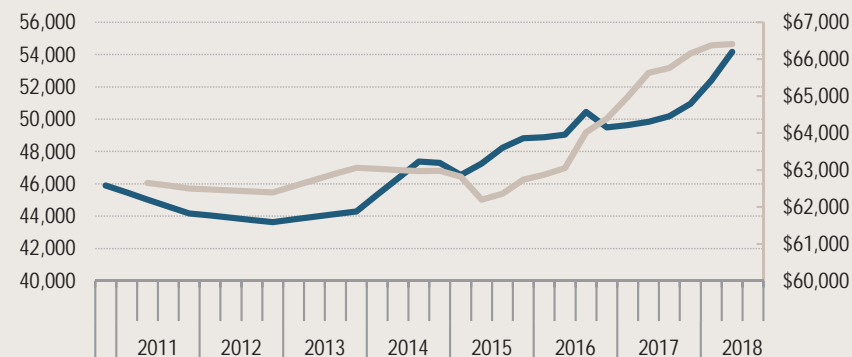
— Jobs — Average Earnings per Job

HEALTH AND MEDICAL



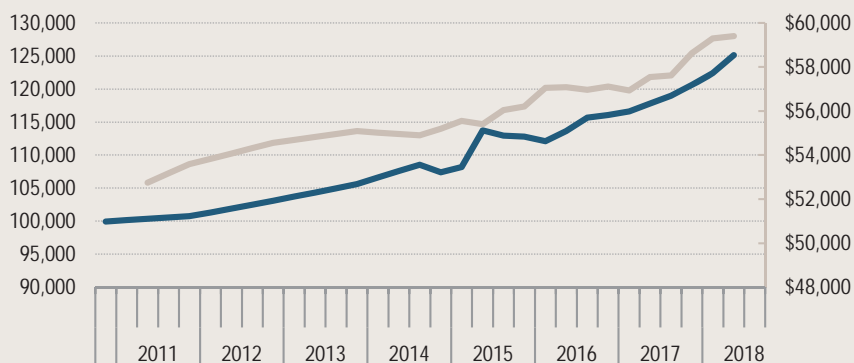
When compared to last quarter, an additional 1,200 jobs were added to Nevada's Health and Medical sector for a total of 111,800 workers employed. Growth in earnings, however, was flat and currently stands at \$56,400. When compared to last year, job counts in Nevada's healthcare sector have expanded by 5.0 percent and earnings by 0.6 percent.

NATURAL RESOURCE TECHNOLOGIES



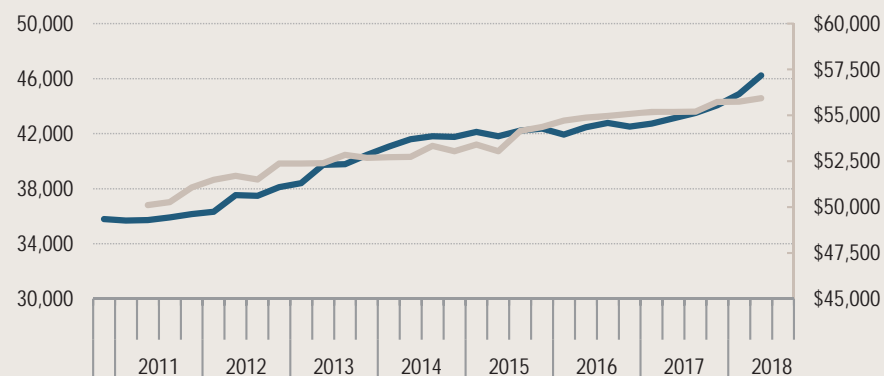
There are currently 54,200 workers in Nevada's Natural Resource Technologies sector with the addition of 1,760 jobs in the second quarter. Average annual earnings have been unchanged and currently stand at \$66,400. When compared to last year, job counts have improved by 8.7 percent and earnings by 1.2 percent.

MANUFACTURING AND LOGISTICS



Although there was a slight annual earnings improvement of \$110 in Nevada's Manufacturing and Logistics sector, job counts improved by more than 2,700 workers in the second quarter. Overall, the sector now employs 125,100 workers with average annual earnings of \$59,400. For the year, jobs have grown by 6.29 percent and earnings by 3.2 percent.

MANUFACTURING

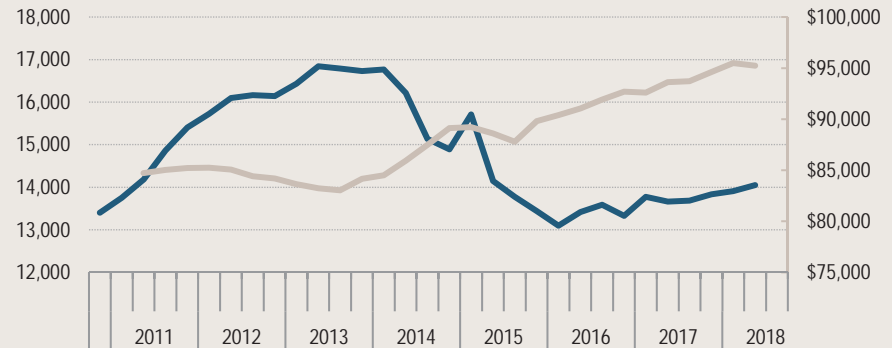


Growth has been strong in Nevada's Manufacturing sector with the addition of 1,340 workers in the second quarter. Currently there are 46,200 workers employed in the sector making, on average, \$55,900 per year. Since last year, job counts have grown by 7.2 percent and average annual earnings by 1.8 percent.

— Jobs — Average Earnings per Job

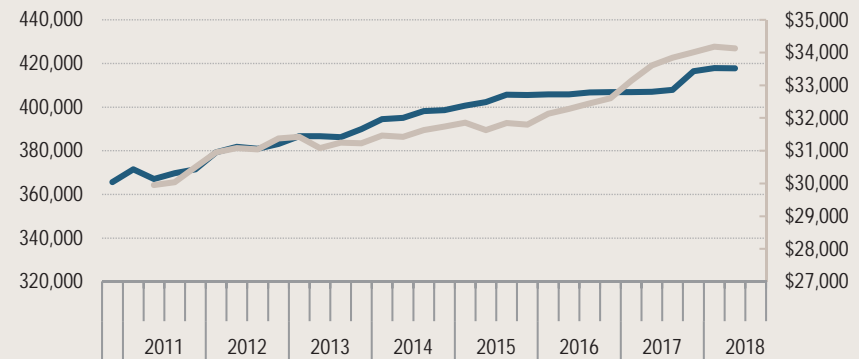
MINING

Job counts in Nevada's Mining sector bumped up slightly in the first quarter with the addition of 140 workers for a total of 14,050. Average annual earnings, however, dropped slightly with the loss of \$260 per year and now stands at \$95,200. When compared to last year, job counts have improved by 2.8 percent and earnings by 1.7 percent.



TOURISM, GAMING, AND ENTERTAINMENT

Job counts and annual earnings in Nevada's Tourism, Gaming, and Entertainment sector changed little in the second quarter. For the year, however, 10,800 workers have been added to the sector and earnings have gone up by \$520. This represents a 2.7 percent increase in jobs and a 1.5 percent increase in earnings. Currently, Nevada's largest industry sector employs 416,400 workers who make, on average, \$34,000 per year.



— Jobs — Average Earnings per Job