

# State of Ohio Workforce

*First Quarter  
2007*



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First Quarter 2007

# Quarterly Report on State of Ohio's Workforce

Reference Period: First Quarter 2007

(Per Ohio Revised Code 6301.10)

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Bureau of Labor Market Information  
Office of Workforce Development  
Ohio Department of Job and Family Services

## Analyst Summary

Ohio's employment growth continued to languish in the first quarter of 2007 after advancing only 0.3 percent in calendar year 2006. The construction sector and downsizing in automotive and related industries continue to be a drag on the economy. The unemployment rate, however, was down from 5.6 percent in the fourth quarter to 5.2 percent in the first quarter of 2007. Some of this decline was attributable to fewer people looking for work during bad weather in February rather than an improvement in the labor market. Employment measured by the survey of business establishments fell 11,600 on a seasonally adjusted basis over the quarter. The Ohio composite index of leading indicators also decreased slightly in the first quarter pointing to slow employment growth into the summer.

The U.S. unemployment rate for the first quarter averaged 4.5 percent, the same as in the fourth quarter but down from 4.7 percent in the first quarter of 2006. Ohio's unemployment rate averaged 0.8 percentage point higher than the U.S. rate during the past twelve months. The average number of Ohioans unemployed per month has declined over the quarter from 330,000 in the fourth quarter to 307,000 in the first quarter of 2007, the same as posted a year ago. Ohio's unemployment rate of 5.2 percent for the quarter was also the same as a year ago.

The number of initial claims for unemployment insurance filed in Ohio each month in 2006 generally were about the same or a little lower than those posted during 2001-2005. Claims filed so far in 2007 have been somewhat higher than a year ago. The average duration of unemployment compensation stood at 15.0 weeks for the first quarter, the same as in the prior quarter, and slightly lower than the U.S. average duration.

Ohio's nonagricultural wage and salary employment fell 11,600 over the quarter, from 5,442,500 in the fourth quarter of 2006 to 5,430,900 in the first quarter of 2007 on a seasonally adjusted basis. The goods-producing sector accounted for most of the loss. Nonfarm wage and salary jobs were also down compared to a year ago. Some sectors did post gains: educational and health services; accommodation and food services; and trade, transportation and utilities.

The composite index of Ohio's leading indicators decreased slightly to 96.5 in the first quarter, pointing to slow employment growth this summer. The national composite index of leading economic indicators decreased 0.3 percentage point during the first quarter, suggesting that U.S. economic growth will continue at a slow pace in the coming months as well. The construction industry continues to be hard hit in Ohio and across the country. U.S. domestic auto production remained at a low level in the first quarter.

# **Unemployment Rates and Related Data**

## Employment Situation: Ohio and U.S. (Seasonally Adjusted)

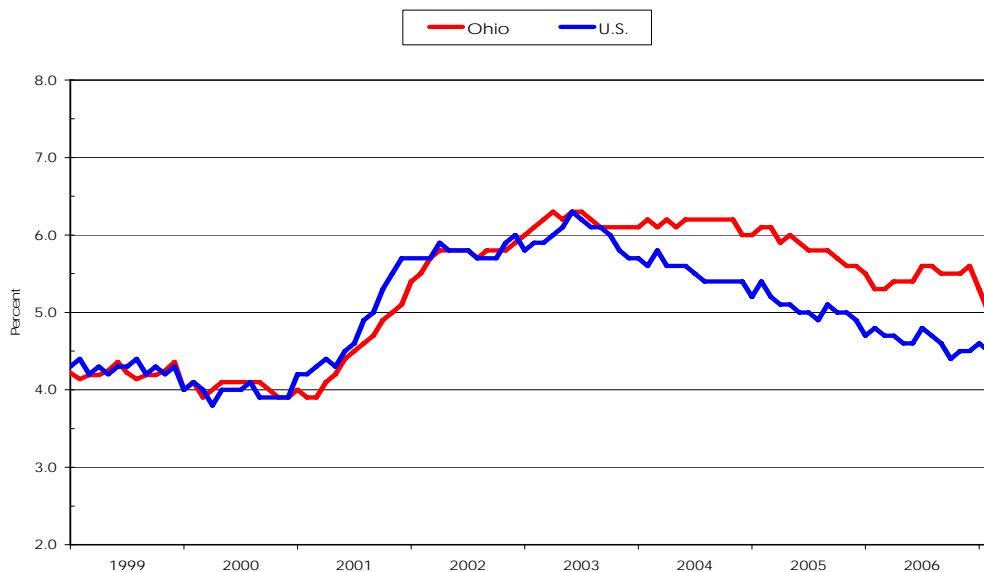
Ohio's unemployment rate for the first quarter of 2007 was 5.2 percent, down from the fourth quarter of 2006 and unchanged from a year ago. The U.S. unemployment rate for the first quarter 2007 was 4.5 percent, unchanged from the fourth quarter of 2006 and down slightly from 4.7 percent a year ago. The average number of Ohioans unemployed per month has dropped over the quarter from 330,000 to 307,000.

### Employment Situation Indicators for Ohio and U.S.

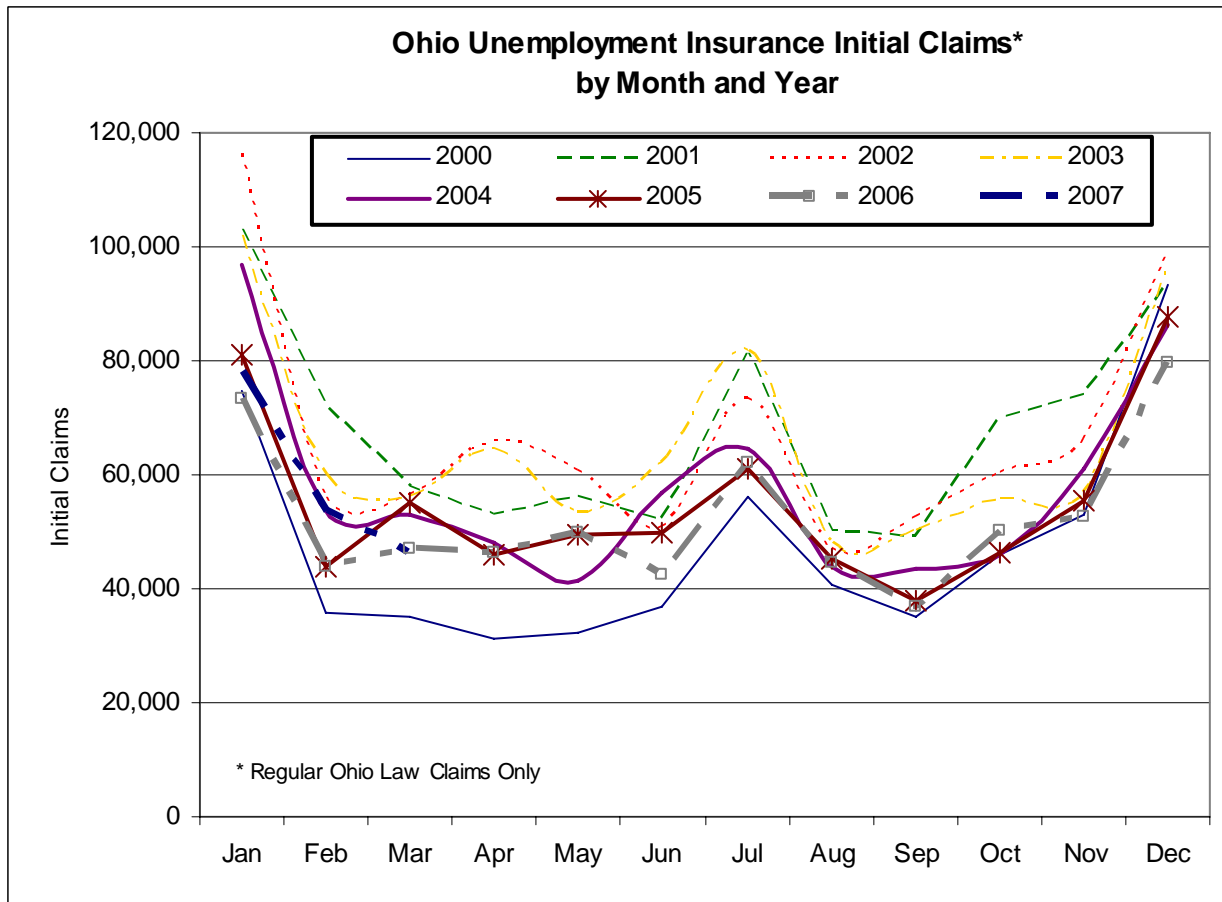
	Quarterly Data (in thousands)			Change (in thousands)		Percent Change	
	1st Qtr. 2007	4th Qtr. 2006	1st Qtr. 2006	From Last Quarter	From Last Year	From Last Quarter	From Last Year
Seasonally Adjusted							
	<b>Ohio</b>						
Civilian Labor Force	5,966	5,953	5,904	13	63	0.2%	1.1%
Employment	5,659	5,623	5,597	36	62	0.6%	1.1%
Unemployment	307	330	307	-23	0	-7.0%	0.0%
Unemployment Rate	5.2%	5.6%	5.2%	-0.4%	0.0%		
	<b>U.S.</b>						
Civilian Labor Force	152,912	152,425	150,429	487	2,483	0.3%	1.7%
Employment	146,043	145,629	143,366	415	2,677	0.3%	1.9%
Unemployment	6,869	6,797	7,063	72	-195	1.1%	-2.8%
Unemployment Rate	4.5%	4.5%	4.7%	0.0%	-0.2%		

- Ohio and U.S. unemployment rates closely mirrored each other through mid-2003.
- During the latter half of 2003, the rates began to diverge as Ohio's unemployment rate remained high while the U.S. unemployment rate steadily declined.
- During the past twelve months, Ohio's unemployment rate has averaged 0.8 percentage point higher than the U.S. rate.

**Ohio and U.S. Seasonally Adjusted Unemployment Rates**



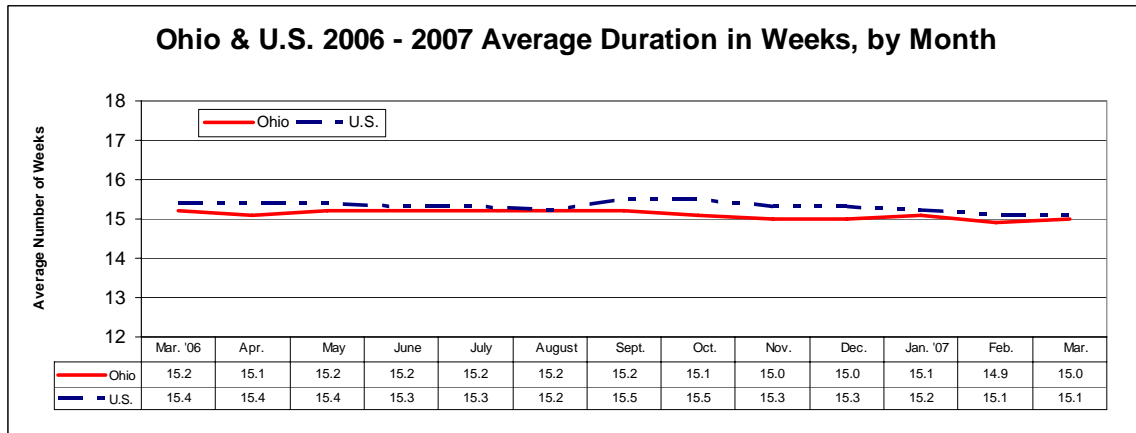
## Ohio Monthly Unemployment Insurance Initial Claims



- In each year from 2000 through 2006, monthly initial claims for unemployment insurance followed the same seasonal pattern, with major increases in claims activity occurring in December, January and July.
- Initial claims were generally elevated from 2001 through 2006 when compared to 2000 for any given month.
- Initial claims in March 2007 were slightly lower than the level recorded in March 2006.

## Average Duration of Unemployment: Ohio and U.S.

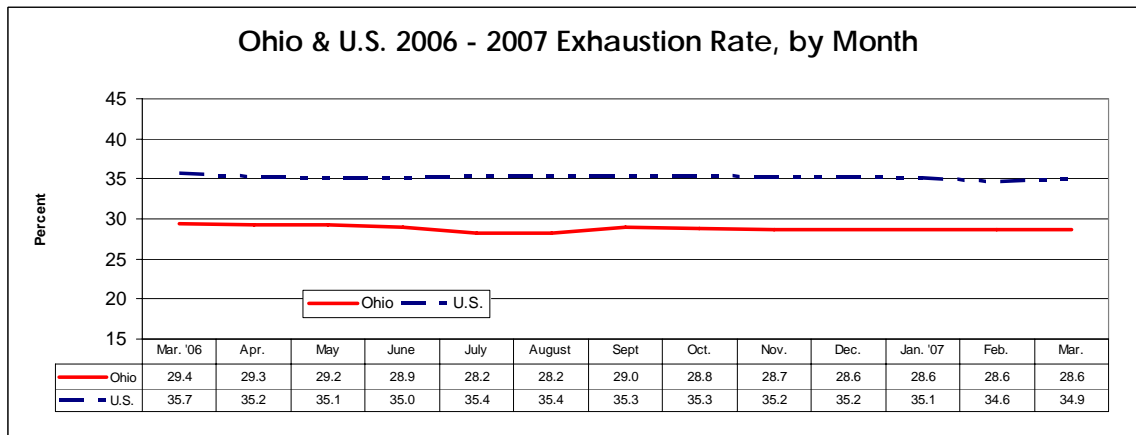
Average duration represents the average number of weeks of compensation received by unemployed claimants during the represented period.



- Ohio's average duration of unemployment closely mirrored the U.S. for most of 2006.
- Ohio's average duration increased slightly to 15.0 weeks for March 2007, while the U.S. duration remained at 15.1 weeks.

## Unemployment Insurance Benefit Exhaustions: Ohio and U.S.

The exhaustion rate represents a measure of the proportion of unemployment insurance recipients who ultimately exhaust their benefits. Comparison of exhaustion rates over time and across regions provides an indication of the relative severity of the unemployment situation.



- Ohio and national exhaustion rates have remained relatively unchanged over the past twelve months.
- Ohio's exhaustion rate stayed consistently lower than that of the U.S.
- Ohio's exhaustion rate held steady at 28.6 weeks, while the U.S. rate increased slightly to 34.9 weeks in March 2007.



# **Employment Data**

## **Ohio Nonagricultural Wage and Salary Employment (Seasonally Adjusted)**

Ohio's nonagricultural wage and salary employment fell 11,600 over the quarter, from 5,442,500 in the fourth quarter of 2006 to 5,430,900 in the first quarter of 2007.

Employment in goods-producing industries, at 1,022,600, was 8,900 lower. Losses of 5,800 in durable goods and 2,900 in nondurable goods reduced manufacturing 8,700. Natural resources and mining dropped 500. Construction added 300 jobs. Service-providing industries declined 2,700 to 4,408,300. A drop of 7,000 in administrative, support and waste services was partially offset by gains in professional and technical services (+2,500) and management of companies and enterprises (+500), lowering professional and business services 4,000. Employment was also down in government (-2,700), financial activities (-1,800), other services (-1,200), and information (-800). Growth in health care and social assistance boosted educational and health services 4,000. Trade, transportation and utilities advanced 2,000, while leisure and hospitality rose 1,800.

Over the year, nonfarm wage and salary employment dropped 16,800. Goods-producing industries fell 27,000. Manufacturing was down 20,900, with most of the loss in durable goods. Construction was 5,800 lower, while natural resources and mining slipped 300. Service-providing industries advanced 10,200. Educational and health services rose 9,900 due to gains in health care and social assistance. Increases in professional and technical services helped raise professional and business services 4,900. Trade, transportation and utilities added 2,800 jobs. Financial activities declined 2,700 over the year. Also down were leisure and hospitality (-1,700), other services (-1,500), information (-1,000), and government (-500).

**Nonagricultural Wage and Salary Employment Estimates for Ohio<sup>a</sup>**

Seasonally Adjusted

**Employer Survey Data<sup>b</sup>**

	Employment (in thousands)			Change (in thousands)		Percent Change	
	1st Qtr. 2007	4th Qtr. 2006	1st Qtr. 2006	From Last Quarter	From Last Year	From Last Quarter	From Last Year
<b>Total</b>	5,430.9	5,442.5	5,447.7	-11.6	-16.8	-0.2%	-0.3%
<b>Goods-Producing Industries</b>	1,022.6	1,031.5	1,049.6	-8.9	-27.0	-0.9%	-2.6%
Natural Resources and Mining	11.2	11.7	11.5	-0.5	-0.3	-4.3%	-2.6%
Construction	229.1	228.8	234.9	0.3	-5.8	0.1%	-2.5%
Manufacturing	782.3	791.0	803.2	-8.7	-20.9	-1.1%	-2.6%
Durable Goods	537.4	543.2	552.5	-5.8	-15.1	-1.1%	-2.7%
Nondurable Goods	244.9	247.8	250.7	-2.9	-5.8	-1.2%	-2.3%
<b>Service-Providing Industries</b>	4,408.3	4,411.0	4,398.1	-2.7	10.2	-0.1%	0.2%
Trade, Transportation, and Utilities	1,049.6	1,047.6	1,046.8	2.0	2.8	0.2%	0.3%
Wholesale Trade	239.4	238.5	237.6	0.9	1.8	0.4%	0.8%
Retail Trade	603.7	602.0	606.4	1.7	-2.7	0.3%	-0.4%
Transportation, Warehousing, and Utilities	206.5	207.1	202.8	-0.6	3.7	-0.3%	1.8%
Information	88.1	88.9	89.1	-0.8	-1.0	-0.9%	-1.1%
Financial Activities	305.2	307.0	307.9	-1.8	-2.7	-0.6%	-0.9%
Finance and Insurance	238.1	238.8	239.0	-0.7	-0.9	-0.3%	-0.4%
Real Estate and Rental and Leasing	67.1	68.2	68.9	-1.1	-1.8	-1.6%	-2.6%
Professional and Business Services	659.0	663.0	654.1	-4.0	4.9	-0.6%	0.7%
Professional and Technical Services	242.8	240.3	237.0	2.5	5.8	1.0%	2.4%
Management of Companies and Enterprises	102.4	101.9	101.6	0.5	0.8	0.5%	0.8%
Administrative, Support, and Waste Services	313.8	320.8	315.5	-7.0	-1.7	-2.2%	-0.5%
Educational and Health Services	784.5	780.5	774.6	4.0	9.9	0.5%	1.3%
Educational Services	96.6	96.5	96.4	0.1	0.2	0.1%	0.2%
Health Care and Social Assistance	687.9	684.0	678.2	3.9	9.7	0.6%	1.4%
Leisure and Hospitality	500.8	499.0	502.5	1.8	-1.7	0.4%	-0.3%
Arts, Entertainment, and Recreation	63.0	65.1	66.9	-2.1	-3.9	-3.2%	-5.8%
Accommodation and Food Services	437.8	433.9	435.6	3.9	2.2	0.9%	0.5%
Other Services	221.7	222.9	223.2	-1.2	-1.5	-0.5%	-0.7%
Government	799.4	802.1	799.9	-2.7	-0.5	-0.3%	-0.1%
Federal Government	75.8	76.1	76.7	-0.3	-0.9	-0.4%	-1.2%
State Government	168.4	168.1	168.6	0.3	-0.2	0.2%	-0.1%
Local Government	555.2	557.9	554.6	-2.7	0.6	-0.5%	0.1%

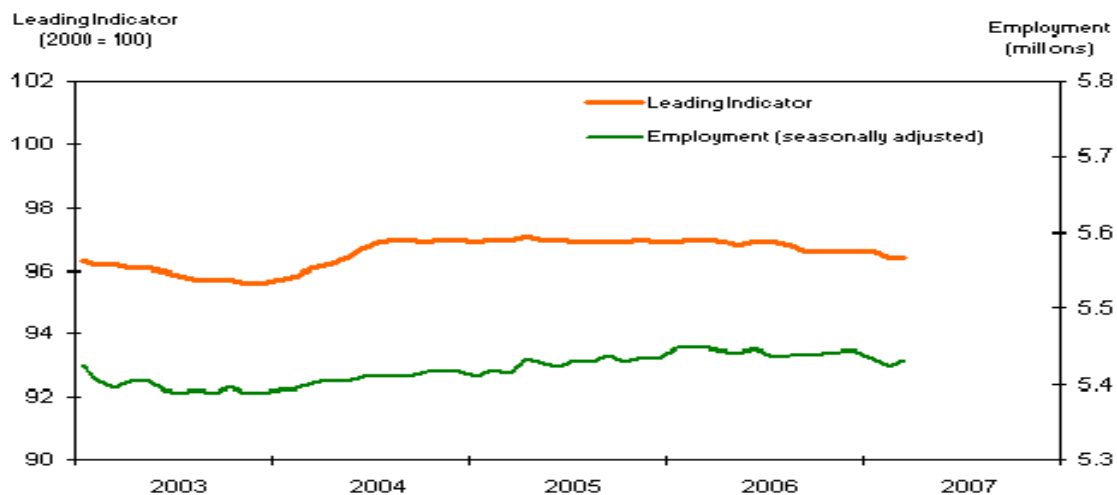
<sup>a</sup>Subtotals may not add to totals due to rounding. All data exclude military personnel.

<sup>b</sup>From the Current Employment Statistics Survey, a monthly survey of approximately 12,100 employers conducted by ODJFS in cooperation with the U.S. Bureau of Labor Statistics. Estimates represent nonagricultural wage and salary jobs by place of work.

## Leading Indicators: Ohio and U.S. (Seasonally Adjusted)

Ohio's composite index of leading indicators decreased slightly to 96.5 in the first quarter of 2007, suggesting weak employment growth for the summer. The national composite index of leading economic indicators also declined during the first quarter pointing to slow economic growth in the coming months.

### Ohio Leading Indicator and Employment



The Ohio first quarter averages of individual components (not seasonally adjusted) in the index were also weak. Initial claims for unemployment insurance were down slightly from the fourth quarter of 2006, but were higher than a year ago. The average weekly hours for manufacturing production workers were lower than in the fourth quarter of 2006 and compared to a year ago. The valuation and number of permits for new housing construction were down seasonally from the fourth quarter, and down sharply from the first quarter of 2006.

Economic Indicators	Data			Change		Percent Change	
	1st Qtr. 2007	4th Qtr. 2006	1st Qtr. 2006	From Last Quarter	From Last Year	From Last Quarter	From Last Year
<b>Ohio</b>							
Leading Indicator Index (2000=100)	96.5	96.6	97.0	-0.1	-0.5	-0.1%	-0.5%
Average Initial Claims for Unemployment Insurance	62,877	63,911	58,627	-1,034	4,250	-1.6%	7.2%
Average Weekly Hours for Manufacturing	40.8	41.7	41.4	-0.9	-0.6	-2.2%	-1.4%
Average Valuation of Housing Permits (millions of dollars)	387.995	450.327	538.232	-62.332	-150.237	-13.8%	-27.9%
Average Number of Housing Permits	2,406	2,638	3,387	-232	-981	-8.8%	-29.0%
<b>National Data</b>							
National Composite Index of Leading Economic Indicators (1996=100)	137.5	137.8	138.3	-0.3	-0.8	-0.2%	-0.6%
U.S. Domestic Auto Production (annualized in millions)	4.120	4.100	4.835	0.020	-0.715	0.5%	-14.8%
Difference between 10-Year and 1-Year Treasuries, Constant Maturities	-0.33	-0.36	-0.06	0.03	-0.27	-8.3%	450.0%
Average Number of Housing Permits	120,486	118,444	164,095	2,042	-43,609	1.7%	-26.6%

## Jobs Gained or Lost

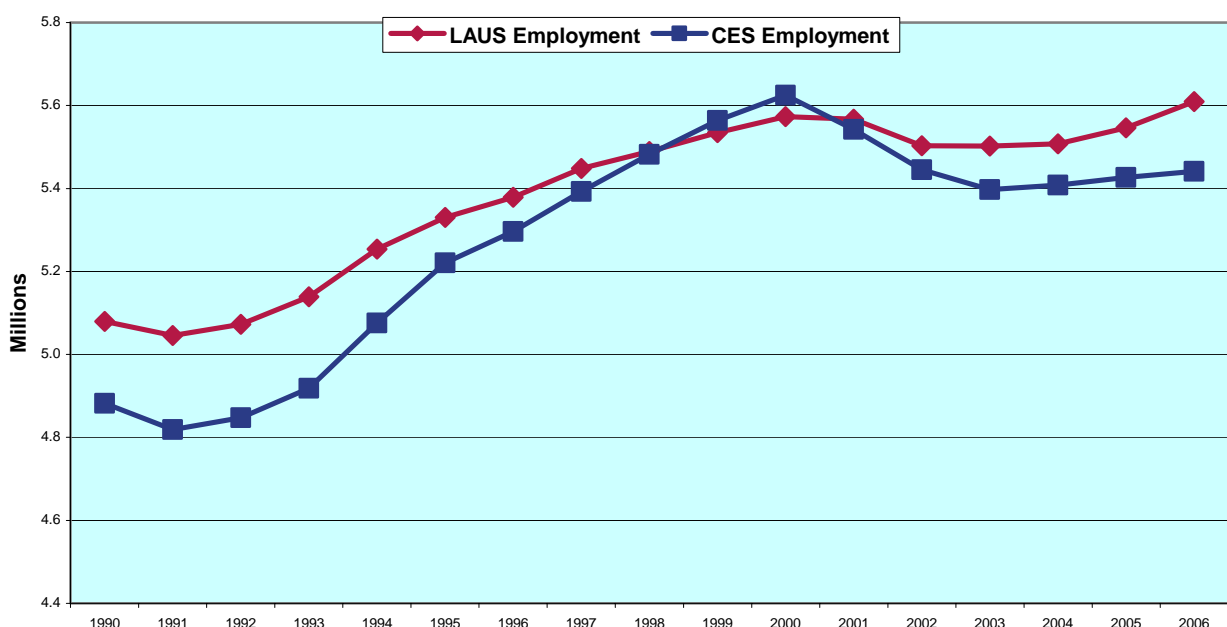
### Current Employment Survey (CES)

The most reliable and most easily understood statistic on jobs is the nonagricultural wage and salary employment which comes from the Current Employment Survey (see the Technical Notes section for more detail). This business establishment survey tracks most closely with business cycle changes and is the statistical source most heavily relied on by labor economists, including those at the Bureau of Labor Statistics. It provides information on jobs lost or gained from month-to-month and over the year. The trend in nonagricultural employment is CES data. Of course, there is considerable dynamic activity behind these figures in respect to job changes, layoffs and hiring activity, which in themselves are not represented in the net job statistic.

### Local Area Unemployment Statistics (LAUS) and Current Population Survey (CPS)

The employment numbers published under the Employment Situation Indicators chart for Ohio (LAUS data) earlier in this packet are heavily dependent on the Current Population Survey (often referred to as the "Household" survey). These figures are useful for understanding the unemployment rate and can be useful for the labor economist's analysis of what is happening in the labor market. However, as a general measure of job growth or decline and corresponding public announcements, it has proven problematic. The CPS for Ohio contains a small sample of households, tends to be highly volatile and is benchmarked (i.e., controlled to a known universe) only once every ten years with the decennial census. It has not proven to be a good measure of business cycles. For example, the LAUS employment numbers showed only a slight decline at the onset of the 2001 recession and a much more rapid recovery in 2005 and 2006 than indicated by the CES data (see chart below). The LAUS data have no measure of job loss or gain by industry.

**Ohio LAUS and CES Employment Trends, 1990-2006**



## Mass Layoff Announcements

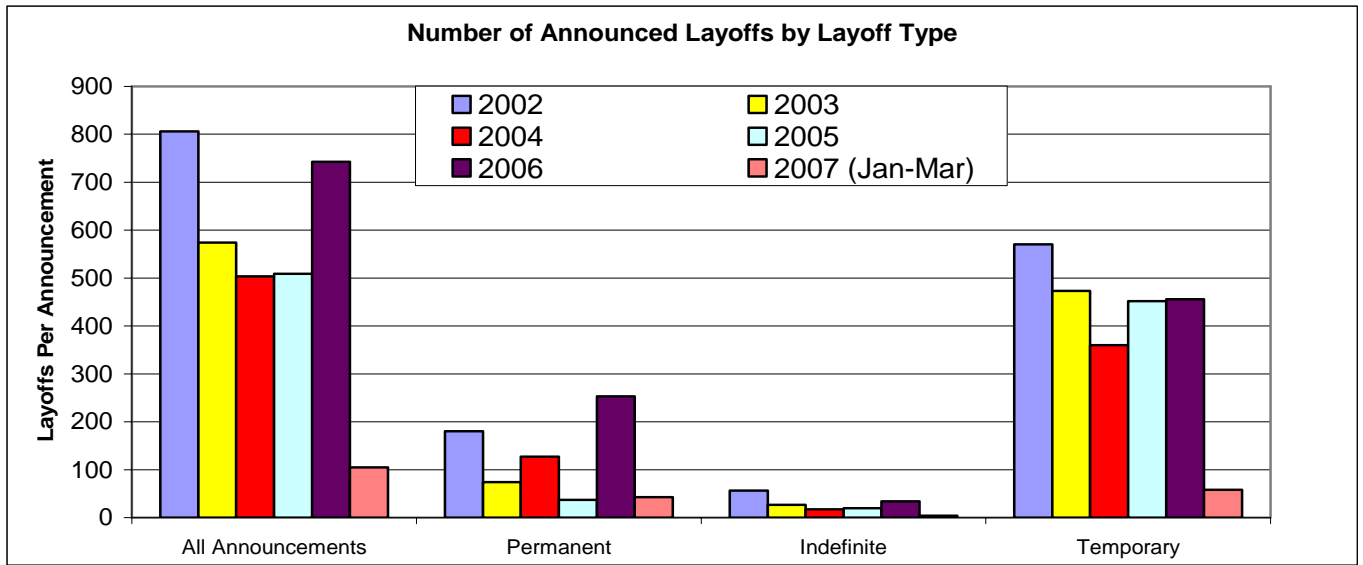
Mass layoff announcements are reported by the business entity. These statistics have proven useful to explain major shifts in the employment situation that may occur at the local level from one month to another. However, they must be used with caution, particularly when considering them at a summary level or as a state-wide indicator. These statistics have the following caveats.

- ODJFS requests employers to provide the greatest number of workers potentially affected and actual numbers are normally less.
- Any employer may announce mass layoffs multiple times and / or for multiple locations over the year.
- There is no formal process or monitoring to assure consistent reporting.
- These numbers are reported "intent" and are never independently verified.
- They may be reported but then circumstances change that decrease the size of the layoff or eliminate the need for a layoff.
- Even if a layoff materializes, it does not necessarily mean people are unemployed as a result. They may retire, work part time, take severance pay or find another job.
- A number of the reported layoffs are part of a normal business cycle, where the business normally restricts operations for product change-over, inventory processes or because of seasonal demand cycles.
- Some layoffs are very short lived, while others could take a year or more to complete. There is no precise measure of timing.

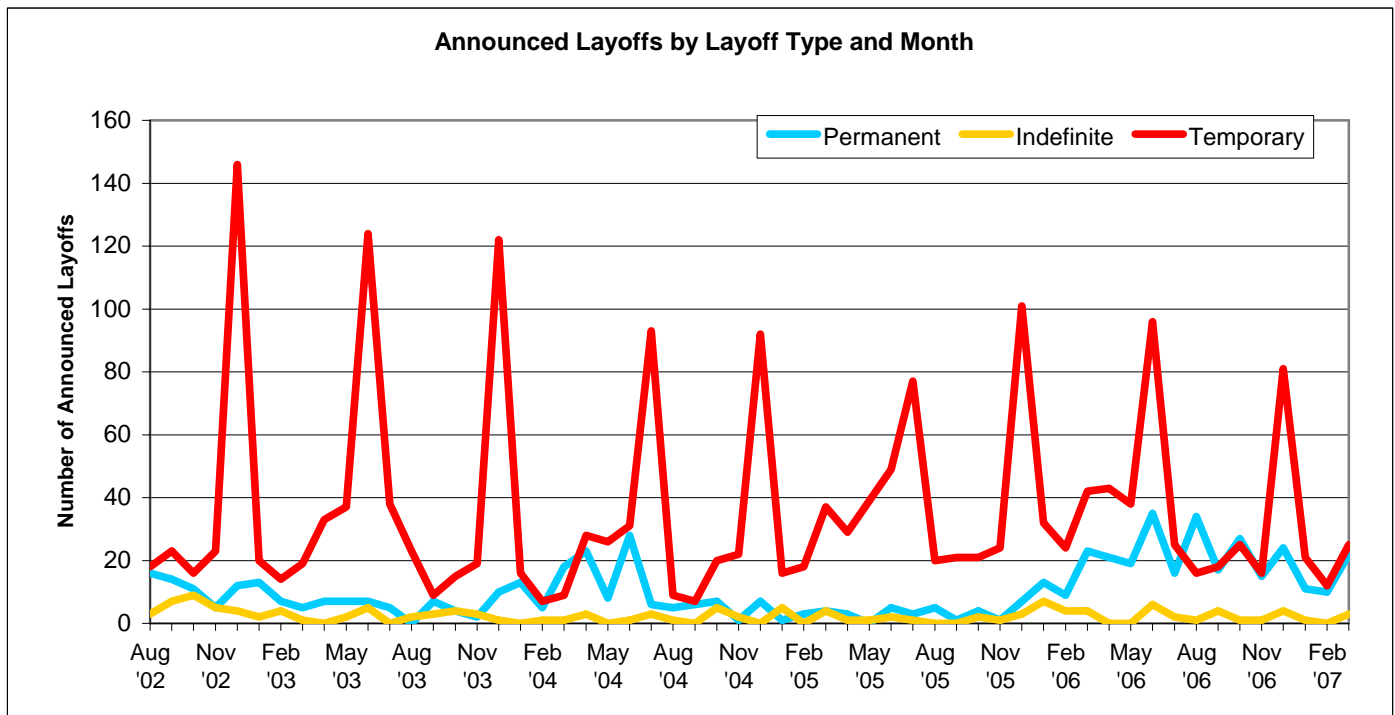
See Mass Layoff Announcements table and graph on next page.

## Mass Layoff Announcements, 2002 to March 2007

Year	Layoff Announcements	Announced Laid Off	Permanent Layoffs		Indefinite Layoffs		Temporary Layoffs	
			Events	Employees	Events	Employees	Events	Employees
2002	806	147,385	180	14,563	56	6,969	570	125,853
2003	574	128,497	74	9,187	27	3,201	473	116,109
2004	504	100,098	127	12,240	17	1,781	360	86,077
2005	509	131,712	37	4,894	20	2,072	452	124,746
2006	743	131,628	253	13,481	34	3,224	456	114,923
2007 (Jan-Mar)	105	20,161	43	2,376	4	250	58	17,535



The graph below is an example of the highly seasonal nature of these mass layoff announcements.



## **Related Information**



## Related Information

**Quarterly Census of Employment and Wages:** LMI published tables for the 3<sup>rd</sup> Quarter 2006 Census of Employment and Wages (QCEW). Employment covered by the Ohio Unemployment Compensation Law totaled 5.27 million - up 0.1 percent from the year before - while payroll, at \$49.231 billion, was up 0.3 percent during the same period. These publications (RS203.1-B and RS203.2-B) may be found at [http://lmi.state.oh.us/CEP/CEP\\_NAICS.htm](http://lmi.state.oh.us/CEP/CEP_NAICS.htm).

**Bioscience Employment in Ohio:** Customized data from the Quarterly Census of Employment and Wages were prepared in response to a request from BioOhio, Ohio's bioscience membership and development organization. BioOhio was in the midst of a statewide bio-industry workforce needs survey, and the employment figures we provided were used to complement the survey data. According to BioOhio's Senior Program Director, William C. Tacon, Ph.D., "The biosciences are a diverse and often converging group of industries and activities with a common link--they apply knowledge of the way in which plants, animals, and humans function. The bioscience sector spans different markets and includes entities involved in health-related manufacturing, services, and research activities. Ohio has nearly 800 bioscience-related entities operating in the state, ranging from the very large to the very young. Bioscience-related entities include those involved in research, development, and marketing of pharmaceuticals, diagnostics, bioinformatics, medical devices, medical equipment, and other health-related products." The LMI Bureau provided Ohio and regional employment data for these sectors.

**Workforce Analysis Reports for Workforce Investment Areas:** The Bureau of Labor Market Information recently completed Workforce Analysis reports for all of Ohio's Workforce Investment Areas, including the twelve One-Stops in Workforce Investment Area 7. These publications review demographic and economic characteristics for state and local labor markets, including trends in population, employment, unemployment rates, income and housing. These reports are available at <http://lmi.state.oh.us/research/Research.htm>.

# **Technical Notes**

## Technical Notes

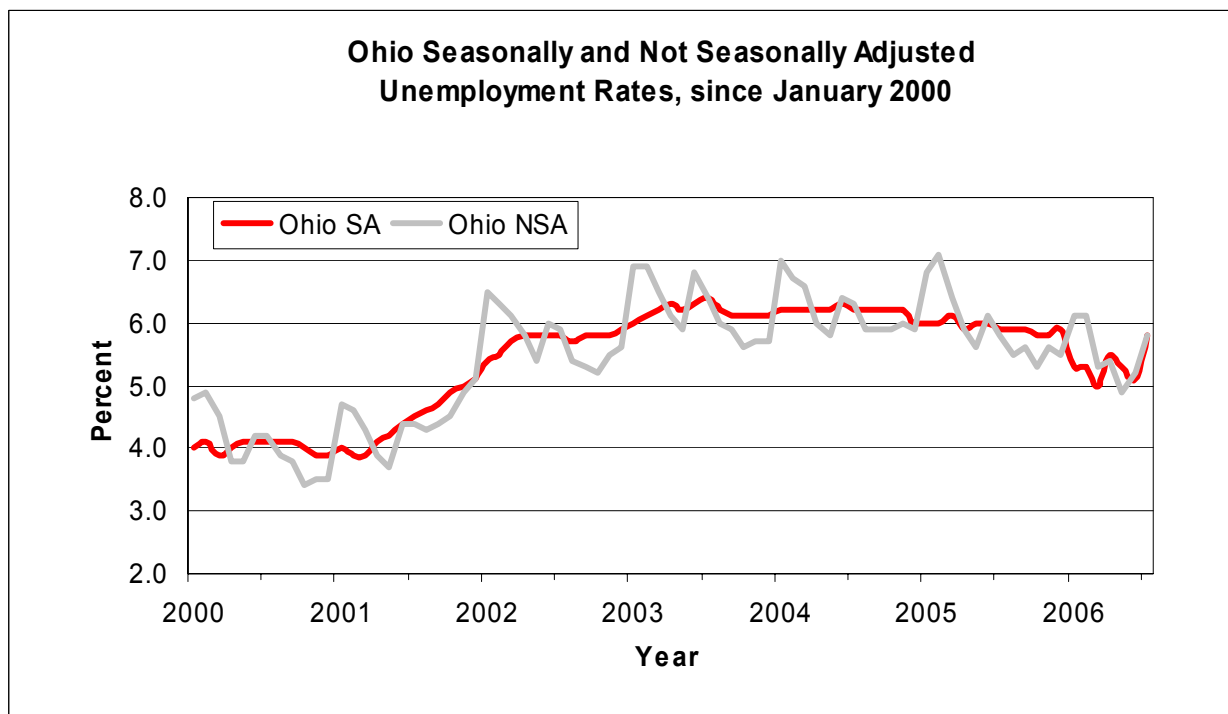
### Seasonal Adjustment

Ohio and U.S. unemployment rates and labor force data are published monthly by the BLS. Two sets of data are published: seasonally adjusted data and not seasonally adjusted data. County data are not seasonally adjusted because seasonal adjustment factors tend to be unreliable for small areas.

Seasonal adjustment is used to remove fluctuations in unemployment and labor force trends that normally occur with changes in the season. The removal of seasonal variation allows evaluation of the unemployment rates as an indicator of economic change.

Seasonal variation in the employment situation occurs for a variety of natural and institutional reasons. Examples include reduction of employment involving outdoor activities during winter, large changes in labor force and unemployment levels with opening and closing of schools, and employment reductions during the automobile model changeover period. The overall impact of such events is a seasonal rise in unemployment rates during the winter months, usually peaking in January and February, and a drop in unemployment rates during the spring and late summer with May and September typically the low months.

The graph below presents the wide month-to-month changes that occur in the not seasonally adjusted data which reinforces our use of seasonally adjusted data, when available.



## **Unemployment Rates and Related Data**

### **Employment Situation: Ohio and U.S**

U.S. data are derived from a national household survey known as the Current Population Survey (CPS). This survey is conducted monthly by the U.S. Bureau of the Census for the U.S. Bureau of Labor Statistics (BLS). The survey collects data on the demographic characteristics and labor force status of household members, including employment and unemployment from approximately 60,000 households.

Ohio data are developed in cooperation with the BLS using the State Time Series Analysis and Review System (STARS). This method relies heavily on monthly unpublished CPS data as well as current wage and salary employment and unemployment insurance statistics. The time series model is designed to provide data on employment of all types of workers, based on place of residence.

### **Ohio Monthly Unemployment Insurance Initial Claims**

Initial claims information was obtained from administrative records of the Ohio unemployment compensation program, operated by the Ohio Department of Job and Family Services.

An initial claim is defined as any notice of unemployment filed to request a determination of entitlement to and eligibility for compensation, or to begin a second or subsequent period of eligibility within a benefit year. Initial claims counts presented in this report include new, additional, transitional, and interstate agent claims. Beginning in January 2005, transitional claims are excluded from counts since they do not represent newly unemployed workers.

### **Average Duration of Unemployment and Unemployment Insurance Benefit Exhaustions: Ohio and U.S**

Average duration of unemployment was calculated as the total number of weeks compensated for the previous 12 months divided by the total number of first payments for the same 12 month period. First payment is defined as the first payment in a benefit year for a week of unemployment.

Exhaustion rates were calculated as the number of claimants exhausting benefits divided by the number of claimants' first receiving benefits two quarters earlier.

Monthly totals for average duration of unemployment and number of exhaustions in the U.S. and Ohio were obtained from the U.S. Department of Labor, Employment and Training Administration (ETA). The national ETA office collects unemployment data from the states, then compiles and redistributes state and national unemployment insurance statistics through a required reporting mechanism in which all states participate.

The Claims and Payment Activities report (ETA-5159) serves as the basis for these figures. The DOL-ETA site is <http://workforcesecurity.doleta.gov/unemploy/content/data.asp>.

## **Employment Data**

### **Ohio Nonagricultural Wage and Salary Employment**

Ohio nonfarm employment data are derived from an employer survey known as the Current Employment Survey (CES). This survey is conducted monthly by ODJFS/BLMI, in cooperation with the BLS. The data are compiled from voluntary reports from 11,800 Ohio employers. The employer survey provides data on total employment, and on hours and earnings of production workers, by type of industry.

The employer survey does not include the self-employed, unpaid family workers, private household workers, agricultural workers, or those on strike or unpaid vacation and are based on place of work. Analysts generally regard the nonfarm data as the most reliable indicator of the current economic conditions due to its large sample size and the fact that the data are benchmarked annually to the complete count of employment from administrative unemployment insurance records.

### **Trends in Ohio Nonagricultural Wage and Salary Employment**

Goods-producing industries include natural resources and mining, construction, and manufacturing. Service-providing industries include trade, transportation and utilities, information, financial activities, professional and business services, educational and health services, leisure and hospitality, other services, and government.

### **Ohio Leading Economic Indicators**

The leading indicator index for Ohio is designed to anticipate changes in the economy based on changes in six component data series. At the national level, the Gross National Product is an acceptable measure of general levels of economic activity, but no monthly measure of the dollar value of goods and services produced at the state level exists. Therefore, seasonally adjusted employment estimates (CES data referenced above) are used to evaluate how well the economy is performing. The amount of variability in the composite indexes has been reduced by computing a six-month moving average.

Six components consistently conformed to the criteria cited above and explained a large portion of employment variation and business cycle movement. Three of these, the national composite index of leading indicators, domestic auto production and the spread of 10-year treasury interest rates and 1-year treasury interest rates, are national components. The index is normalized to the annual average total nonfarm wage and salary employment level in 2000.

### **Web Links for additional information**

U.S. Bureau of Labor Statistics site: <http://www.bls.gov>

Ohio Bureau of Labor Market Information sites: <http://OhioWorkforceInformer.org> and <http://lmi.state.oh.us>.

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**Bureau of Labor Market Information  
Business Principles for Workforce Development**

Partner with the workforce and economic development community.

Develop and deploy new information solution tools and systems for the workforce and economic development community.

Provide products and services that are customer and demand driven.

Be known as an important and reliable source for information solutions that support workforce development goals and outcomes.

This quarterly report was prepared by the Ohio Department of Job & Family Services to meet the requirements of the Ohio Revised Code 6301.10.

For further information, visit our websites at <http://OhioWorkforceInformer.org> and <http://lmi.state.oh.us> or contact the Ohio Bureau of Labor Market Information at 1-888-2WORK-411 or 1-888-296-7541.

Ted Strickland, *Governor*  
State of Ohio

Helen E. Jones-Kelley, *Director*  
Ohio Department of Job & Family Services

Office of Workforce Development  
Bureau of Labor Market Information

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