Ohio Department of Job and Family Services

To Strengthen Ohio's Families through the Delivery of Integrated Solutions to Temporary Challenges

State of Ohio Workforce 1st Quarter 2 0 1 1



Quarterly Report on the State of Ohio's Workforce Reference Period: First Quarter 2011

(Per Ohio Revised Code 6301.10)

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Ohio Department of Job and Family Services Office of Workforce Development Bureau of Labor Market Information Release date: June 8, 2011

Summary

Ohio's unemployment rate was 9.2 percent during the first quarter of 2011, down from 9.6 during the fourth quarter of 2010 and 10.6 percent one year ago. The U.S. unemployment rate for the first quarter was 8.9 percent, down from 9.6 percent in the fourth quarter 2010 and down from 9.7 percent one year ago. The average number of Ohioans unemployed per month decreased over the quarter from 565,000 to 540,000.

Ohio's nonagricultural wage and salary employment increased by 38,800 jobs over the first quarter, from 5,039,300 to 5,078,100 on a seasonally adjusted basis.

Service-providing industries increased by 31,900 jobs over the quarter. The most significant gain among service sectors was in educational and health services followed by professional and business services; leisure and hospitality; financial activities; trade, transportation, and utilities; other services; and information. Employment in government declined over the quarter. Employment in goods-producing industries increased over the quarter by 6,900 jobs. Construction and manufacturing increased, while mining and logging remained at its fourth quarter 2010 level.

Over the year, nonfarm wage and salary employment increased by 68,800. Service-providing industries increased 56,100 from first quarter 2010. Gains were posted in professional and business services; educational and health services; leisure and hospitality; other services; and trade, transportation, and utilities, while employment decreased over the year in government; information; and financial activities. Goods-producing industries added 12,700 jobs over the year. The bulk of the increase was in manufacturing employment, while construction and mining and logging posted modest gains. Unemployment Rates and Related Data

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

Ohio's unemployment rate for the first quarter of 2011 was 9.2 percent, down from 9.6 percent in fourth quarter 2010 and from 10.6 a year ago. The U.S. unemployment rate for the first quarter was 8.9 percent, down from 9.6 percent in fourth quarter 2010 and from 9.7 a year ago. The average number of Ohioans unemployed per month has decreased over the quarter from 565,000 to 540,000.

Employment Situation Indicators for Ohio and U.S.	Quarterly Data (in thousands)			Change (in thousands)		Percent Change	
	1st Qtr.	4th Qtr.	1st Qtr.	From Last	From Last	From Last	From Last
Seasonally Adjusted	2011	2010	2010	Quarter	Year	Quarter	Year
	Ohio						
Civilian Labor Force	5,897	5,892	5,906	5	-9	0.1%	-0.2%
Employment	5,357	5,326	5,283	31	74	0.6%	1.4%
Unemployment	540	565	623	-25	-83	-4.5%	-13.4%
Unemployment Rate	9.2%	9.6%	10.6%	-0.4%	-1.4%		
	U.S.						
Civilian Labor Force	153,279	153,867	153,602	-588	-323	-0.4%	-0.2%
Employment	139,587	139,066	138,720	520	866	0.4%	0.6%
Unemployment	13,693	14,801	14,882	-1108	-1189	-7.5%	-8.0%
Unemployment Rate	8.9%	9.6%	9.7%	-0.7%	-0.8%		

- Since 2004, Ohio's unemployment rate remained higher than the U.S. unemployment rate. The rates started to converge in the last half of 2010.
- During the last six months, Ohio's unemployment rate has an average 0.1 percentage point higher than the U.S. rate.
- In November 2010, Ohio's unemployment rate was 0.2 percentage points lower than the U.S. rate.





Ohio Monthly Unemployment Insurance Initial Claims

- Monthly initial claims for unemployment insurance follow a typical seasonal pattern every year, with major increases in claims activity occurring in January, July and December.
- Initial claims in April 2011 were slightly higher (3.7%) than the level recorded in 2010.



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 has remained higher than that of the U.S. for the past 12 months.
- The Ohio average duration decreased to 19.8 weeks for March 2011 while the U.S. average decreased slightly to 18.6 weeks for the same period.



Average Duration reflects Regular Ohio Law Claims only.

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.



Exhaustion Rate reflects Regular Ohio Law Claims only.

- Ohio and national exhaustion rates have remained steady over the past 12 months.
- Ohio's exhaustion rate stayed consistently lower than that of the U.S.
- Ohio's exhaustion rate decreased to 47.1 percent, while the U.S. rate decreased to 52.3 percent in March 2011.

Employment Data

Ohio Nonagricultural Wage and Salary Employment (Seasonally Adjusted)

Ohio's nonagricultural wage and salary employment increased 38,800 over the quarter, from 5,039,300 in the fourth quarter of 2010 to 5,078,100 in the first quarter of 2011.

Service-providing industries, at 4,271,800, increased 31,900 over the quarter as most sectors experienced growth. The most significant gain occurred in educational and health services (+9,300). Employment was also up in professional and business services (+6,600), leisure and hospitality (+6,300), financial activities (+4,000), trade, transportation, and utilities (+3,900), other services (+3,200), and information (+100). Government lost 1,500 jobs from fourth quarter 2010. The total workforce in goods-producing industries increased 6,900 to 806,300. Construction (+4,600) and manufacturing (+2,300) experienced gains, while mining and logging remained at the fourth quarter 2010 level.

Over the year, nonfarm wage and salary employment advanced 68,800. Service-providing industries increased 56,100 from first quarter 2010. Gains were posted in professional and business services (+21,200), educational and health services (+20,300), leisure and hospitality (+13,100), other services (+5,800), and trade, transportation, and utilities (+1,900). Employment decreased over the year in government (-4,200), information (-1,400), and financial activities (-600). Goods-producing industries added 12,700 jobs. Manufacturing increased 12,100 as a gain in durable goods (+15,100) exceeded a loss in nondurable goods (-3,000). Mining and logging (+400) and construction (+200) also posted modest gains.

Nonagricultural Wage and	Employment		Change		Percent			
Salary Employment Estimates		(in thousands)		(in thou	usands)	Cha	nge	
for Ohio ^a	1st Qtr.	4th Qtr.	1st Qtr.	From Last	From Last	From Last	From Last	
Seasonally Adjusted	2011	2010	2010	Quarter	Year	Quarter	Year	
Employer Survey Data ^b								
Total	5,078.1	5,039.3	5,009.3	38.8	68.8	0.8%	1.4%	
Coods Braducing Industries	004.2	700 /	702.4	6.0	107	0.0%	1 4 0/	
Mining and Logging	11 /	199.4	193.0	0.9	0.4	0.9%	2.6%	
	170.6	166.0	170 /	0.0	0.4	0.0%	0.1%	
Manufacturing	624.2	622.0	612.2	4.0	0.Z 10.1	2.070	0.1%	
	024.3 110 0	412.0	402.7	Z.3 5.0	12.1	0.4%	2.0%	
Nondurable Coods	410.0 205 5	413.0	403.7 200 F	5.0 2.7	10.1	1.∠% 1.20/	3.7% 1.40/	
Nondulable Goods	205.5	200.2	206.5	-2.7	-3.0	-1.3%	-1.470	
Service-Providing Industries	4,271.8	4,239.9	4,215.7	31.9	56.1	0.8%	1.3%	
Trade, Transportation, and								
Utilities	949.5	945.6	947.6	3.9	1.9	0.4%	0.2%	
Wholesale Trade	219.0	216.6	215.4	2.4	3.6	1.1%	1.7%	
Retail Trade	549.1	548.4	551.9	0.7	-2.8	0.1%	-0.5%	
Transportation, Warehousing,								
and Utilities	181.4	180.6	180.3	0.8	1.1	0.4%	0.6%	
Information	77.0	76.9	78.4	0.1	-1.4	0.1%	-1.8%	
Financial Activities	275.2	271.2	275.8	4.0	-0.6	1.5%	-0.2%	
Finance and Insurance	215.3	214.1	217.0	1.2	-1.7	0.6%	-0.8%	
Real Estate and Rental and								
Leasing	59.9	57.1	58.8	2.8	1.1	4.9%	1.9%	
Professional and Business								
Services	634.7	628.1	613.5	6.6	21.2	1.1%	3.5%	
Professional and Technical								
Services	242.8	238.5	235.4	4.3	7.4	1.8%	3.1%	
Management of Companies								
and Enterprises	108.7	107.6	108.5	1.1	0.2	1.0%	0.2%	
Administrative, Support, and								
Waste Services	283.2	282.0	269.6	1.2	13.6	0.4%	5.0%	
Educational and Health Services	857.8	848.5	837.5	9.3	20.3	1.1%	2.4%	
Educational Services	114.1	110.9	111.7	3.2	2.4	2.9%	2.1%	
Health Care and Social								
Assistance	743.7	737.6	725.8	6.1	17.9	0.8%	2.5%	
Leisure and Hospitality	485.4	479.1	472.3	6.3	13.1	1.3%	2.8%	
Arts, Entertainment, and								
Recreation	67.2	63.1	61.9	4.1	5.3	6.5%	8.6%	
Accommodation and Food								
Services	418.2	416.0	410.4	2.2	7.8	0.5%	1.9%	
Other Services	215.7	212.5	209.9	3.2	5.8	1.5%	2.8%	
Government	776.5	778.0	780.7	-1.5	-4.2	-0.2%	-0.5%	
Federal Government	80.7	80.8	81.6	-0.1	-0.9	-0.1%	-1.1%	
State Government	161.1	161.5	160.7	-0.4	0.4	-0.2%	0.2%	
Local Government	534.7	535.7	538.4	-1.0	-3.7	-0.2%	-0.7%	

^aSubtotals may not add to totals due to rounding. All data exclude military personnel.

^bFrom 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.



Trends in Ohio Nonagricultural Wage and Salary Employment

- Since January 2000, Ohio's goods-producing industries (manufacturing, construction and mining and logging) have lost 37.4 percent of their employment while service-providing industries have dropped .9 percent.
- In comparison, the U.S. has lost 26.9 percent of the employment in goodsproducing industries while service-providing industries have increased 6.5 percent.

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

Ohio's composite index of leading indicators increased from a revised 89.3 to 89.9 for the first quarter of 2011. The composite index was 2.2 percent higher than for the first quarter of 2010. The national composite index of leading economic indicators increased from 111.3 to 113.4, and this was higher than for the first quarter of 2010.



Ohio Leading Indicator and Employment

The first quarter 2011 averages of individual Ohio index components (not seasonally adjusted) were mixed compared to one year ago. Initial claims for unemployment insurance were lower and average weekly hours manufacturing increased, but the number of housing permits and their valuation were lower than for the first quarter of 2010.

	Data			Net Ch	nange	Percent Change	
Economic Indicators	2011 Q1	2010 Q4	2010 Q1	Last Quarter	Last Year	Last Quarter	Last Year
		0	hio				
Leading Indicator Index (2000=100)	89.9	89.3	87.9	0.6	2.0	0.7%	2.2%
Average Initial Claims for Unemployment Compensation	65,142	77,236	82,000	-12,094	-16,858	-15.7%	-20.6%
Average Weekly Production Hours in Manufacturing	40.5	40.5	40.1	0.0	0.4	0.0%	0.9%
Average Valuation of Housing Permits (Millions)	\$145.240	\$160.859	\$183.595	-\$15.620	-\$38.355	-9.7%	-20.9%
Average Number of Housing Permits	899	931	1,107	-33	-209	-3.5%	-18.8%
National							
National Composite of Leading Economic Indicators (1996=100)	113.4	111.3	107.5	2.2	5.9	1.9%	5.5%
U.S. Domestic Auto Production (millions, annualized)	2.872	2.533	3.001	0.339	-0.129	13.4%	-4.3%
Spread of 1-Year and 10-Year Treasury Rates, Constant Maturities	3.19	2.61	3.35	0.58	-0.16	22.3%	-4.9%
Average Number of Housing Permits	42,289	43,461	48,535	-1,172	-6,246	-2.7%	-12.9%

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 Data Sources 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 on the previous page 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, 1990-2010

New Hires

The New Hires database was developed as a tool to collect child support. It was not explicitly designed to measure the economic climate. Therefore, the following caveats are important to keep in mind if using the new hire database as a measure of economic activity.

- 1. It does not reflect net jobs lost or gained over time.
- 2. It is a measure of labor market hiring dynamics or churning, but does not include the negative side of such churning, such as separations, layoffs and attrition.
- 3. There is no seasonal adjustment in the figures to control for cyclical business patterns.
- 4. It is not so much a "New Hire" as it is "Any Activity Generating a W-4". As such, it includes:
 - Any person changing jobs or holding multiple jobs through the year is counted multiple times (often true of students).
 - Independent contractors may be assigned to multiple job locations through the year and are counted for each assignment.
 - Seasonal re-hires such as teachers, substitutes and other seasonal workers, are counted since new W-4s are required to be completed.

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 <u>potentially</u> 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.

	Layoff Annoucements		Permanent Layoffs		Indefinite Layoffs		Temporary Layoffs	
Year	Events	Employees	Events	Employees	Events	Employees	Events	Employees
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	531	95,454	131	6,822	31	3,331	369	85,301
2008	1,016	202,657	284	12,305	100	20,671	632	169,681
2009	1,379	211,641	280	12,354	200	22,282	899	177,005
2010	483	68,776	154	4,818	68	7,606	261	56,352
Fhrough Mar '11	65	7,229	30	869	9	696	26	5,664

Mass Layoff Announcements, 2005 to 2011



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

	Data			Net C	hange	Percent Change	
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		0	hio				
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Related Information

Related Information

IHS Global Insight Analysis:

IHS Global Insight believes the national economy has more momentum than first quarter GDP figures suggest. Poor weather hurt construction, and there was an unexpected drop in defense spending, both of which affected GDP. Other leading economic indicators such as initial unemployment claims and business surveys suggest weaknesses in the economy. Improvement in the second half of 2011 will depend on oil prices. Consumer spending is being helped by employment growth, which is cushioning the blow from commodity-priceinflation. Housing continues to be a risk.

Other Economic Indicators:

The Conference Board's Help-Wanted OnLine (HWOL) data series, a measure of labor demand, decreased by 123,800 online ads nationally in April. Ohio increased by 900 advertised job vacancies for the month, and has seen an increase of 36,500 so far for 2011. Ohio's supply/demand rate was 3.29, the 22nd highest rate in the country. The national supply/demand rate for April was 3.05.

The Conference Board's national Employment Trends Index declined 0.6 for April to 100.5, down from 101.1 in March. Although the April index is up 6 percent from a year ago, this was the largest monthly decline since April 2009. Weakening components in the index were initial claims for unemployment insurance, percentage of firms with positions not able to fill right now, number of temporary employees, part-time workers for economic reasons, and job openings.

Technical Notes

Data Sources and Additional Resources Links

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>U.S. data</u> 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.

<u>Ohio data</u> 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

<u>Average duration</u> 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.

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

Quarterly 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 listed below. <u>http://workforcesecurity.doleta.gov/unemploy/content/data.asp</u>

Unemployment Rates for U.S. and Eight Largest States

The unemployment rates presented are the most recent seasonally adjusted data available from BLS for the nation's eight most populated states. This graph includes data for the three months prior to the current reference month because some the states presented release data after the Ohio release date. URL web links for each State are present below and are the quickest source of the most current data.

California	http://www.labormarketinfo.edd.ca.gov
Florida	http://www.labormarketinfo.com/laus/
Illinois	http://lmi.ides.state.il.us/laus/lausmenu.htm
Michigan	http://www.milmi.org/
New York	http://www.labor.state.ny.us/
Ohio	http://ohiolmi.com/laus/current.htm
Pennsylvania	http://www.paworkstats.state.pa.us
Texas	http://www.tracer2.com/

Ohio County Unemployment Rates

Ohio sub-state employment and unemployment estimates are developed using a complex "building-block" methodology, prescribed by BLS, The methodology creates first approximation estimates of the employed and unemployed which are then proportionately adjusted so that they add to the state totals. A more complete statement of methodology may be found at: <u>http://Ohiolmi.com/LAUS/Concepts.htm.</u>

Data for Ohio's sub-state areas are not seasonally adjusted because seasonal adjustment factors for small areas tend to be unreliable.

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 12,100 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.

Web Links for additional information

U.S. Bureau of Labor Statistics site: <u>http://www.bls.gov</u> Ohio Bureau of Labor Market Information site: <u>http://ohiolmi.com</u>

Office of Workforce Development P.O. Box 1618 Columbus, OH 43216-1618

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 and Family Services to meet the requirements of the Ohio Revised Code 6301.10. For further information, visit http://OhioLMI.com or call the Ohio Bureau of Labor Market Information at 1-888-296-7541.

John R. Kasich, Governor State of Ohio http://Ohio.gov

Michael B. Colbert, , Director Ohio Department of Job and Family Services http://jfs.ohio.gov

> Office of Workforce Development http://jfs.ohio.gov/owd/

Bureau of Labor Market Information http://OhioLMI.com

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