Local Outlook:
Cascade County
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Annual Percent Change in Nonfarm Labor Income (in Constant Dollars), 2001-2011
Annual Percent Change in Nonfarm Earnings (in Constant Dollars), 2001-07 and 2007-11

<table>
<thead>
<tr>
<th>County</th>
<th>Percent Change</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Montana</td>
<td>3.3</td>
<td>-0.1</td>
</tr>
<tr>
<td>Gallatin</td>
<td>5.7</td>
<td>-0.9</td>
</tr>
<tr>
<td>Lewis and Clark</td>
<td>3.5</td>
<td>1.0</td>
</tr>
<tr>
<td>Silver Bow</td>
<td>2.7</td>
<td>2.1</td>
</tr>
<tr>
<td>Yellowstone</td>
<td>3.5</td>
<td>0.0</td>
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<tr>
<td>Flathead</td>
<td>4.6</td>
<td>-2.1</td>
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<tr>
<td>Cascade</td>
<td>2.5</td>
<td>0.8</td>
</tr>
<tr>
<td>Missoula</td>
<td>2.1</td>
<td>-1.4</td>
</tr>
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<td>Ravalli</td>
<td>2.6</td>
<td>-3.2</td>
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Nonfarm Employment and Inflation Adjusted Wages and Salaries, Seasonally Adjusted, Cascade County

U.S. Recession Ends

Wages and Salaries

Employment
Montana’s Regional Health Care Industries
### Definition of Health Care

<table>
<thead>
<tr>
<th>NAICS Code</th>
<th>Description</th>
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<tbody>
<tr>
<td>62</td>
<td>Health Care</td>
</tr>
<tr>
<td>621</td>
<td>Ambulatory Health Care Services</td>
</tr>
<tr>
<td>622</td>
<td>Hospitals</td>
</tr>
<tr>
<td>623</td>
<td>Nursing and Residential Care Facilities</td>
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</tbody>
</table>
Health Care Earnings (millions of 2011 dollars)

- Yellowstone: $728
- Missoula: $446
- Cascade: $340
- Flathead: $283
- Gallatin: $187
- Lewis & Clark: $173
- Silver Bow: $122
Composition of Health Care Industry

- Nursing and Residential Care Facilities
- Hospitals
- Ambulatory Health Care Services

Yellowstone: 54% Nursing, 39% Hospitals, 34% Ambulatory
Missoula: 39% Nursing, 34% Hospitals, 36% Ambulatory
Cascade: 34% Nursing, 36% Hospitals, 36% Ambulatory
Flathead: 36% Nursing, 36% Hospitals, 36% Ambulatory
Gallatin: 36% Nursing, 30% Hospitals, 43% Ambulatory
Lewis & Clark: 30% Nursing, 43% Hospitals, 43% Ambulatory
Silver Bow: 43% Nursing, 43% Hospitals, 43% Ambulatory
NAICS 62, Health Care Industry Growth 2001-2010, Percent Change, Constant Dollars

- Yellowstone: 55.2%
- Missoula: 42.1%
- Cascade: 40.2%
- Flathead: 77.0%
- Gallatin: 102.8%
- Lewis & Clark: 47.4%
- Silver Bow: 55.6%
Cascade County’s Economic Base 2011-2013

- Other 5%
- Transportation 7%
- State Gov’t and Higher Ed. 7%
- Manufacturing * 7%
- Trade Center - Other 7%
- Trade Center - Health 11%
- Federal Civ. 10%
- Malmstrom AFB 46%

Construction
* Including Oil Refinery

Energy Growth
Pay Freeze Over
Oil-Related Firms
Some Recovery
Slowdown Over
Stable at Best
Stable, BRAC?

2013 Hopeful
Actual and Projected Change in Nonfarm Earnings, Cascade County, 2009-2016
Projected Annual Percent Change in Nonfarm Labor Income (in Constant Dollars) 2012-2016
Questions?