Annual Percent Change in Nonfarm Labor Income (in Constant Dollars), 2007-2012
Annual Percent Change in Nonfarm Earnings (in Constant Dollars), 2007-09 and 2009-12

<table>
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<th>Percent Change 2009-2012</th>
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* 2007-2010
Annual Percent Change in Nonfarm Earnings (in Constant Dollars), 2007-09 and 2009-12

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<th>Area</th>
<th>Percent</th>
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<td>Gallatin</td>
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<td>Lewis and Clark</td>
<td>2.9</td>
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<tr>
<td>Missoula*</td>
<td>1.9 1.5</td>
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<tr>
<td>Ravalli</td>
<td>1.3</td>
</tr>
<tr>
<td>Silver Bow</td>
<td>0.7</td>
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<tr>
<td>Yellowstone</td>
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<tr>
<td></td>
<td>5.3 4.0</td>
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* 2007-2010
Inflation Adjusted Nonfarm Earnings, Cascade County, 2002-2012
# Cascade County’s Economic Base 2011-2013

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<th>Sector</th>
<th>Feb. ‘13</th>
<th>Aug. ‘13</th>
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<tr>
<td>Other</td>
<td>5%</td>
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<tr>
<td>Transportation</td>
<td>7%</td>
<td>Energy Growth</td>
</tr>
<tr>
<td>State Gov't &amp; Higher Ed.</td>
<td>7%</td>
<td>Pay Freeze Over</td>
</tr>
<tr>
<td>Manufacturing*</td>
<td>7%</td>
<td>Oil-Related Firm</td>
</tr>
<tr>
<td>Trade Center-Other</td>
<td>7%</td>
<td>Some Recovery</td>
</tr>
<tr>
<td>Trade Center-Health</td>
<td>11%</td>
<td>Slowdown Over</td>
</tr>
<tr>
<td>Federal Civ.</td>
<td>10%</td>
<td>Stable at Best</td>
</tr>
<tr>
<td>Malmstrom AFB</td>
<td>46%</td>
<td>Stable, BRAC?</td>
</tr>
<tr>
<td>Construction</td>
<td></td>
<td>2013 Hopeful</td>
</tr>
<tr>
<td>*Includes Oil Refinery</td>
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</table>

*Figures are percentages of economic activity.*

- **Feb. ‘13**
  - Energy Growth
  - Pay Freeze Over
  - Oil-Related Firm
  - Some Recovery
  - Slowdown Over
  - Stable at Best
  - Stable, BRAC?
  - 2013 Hopeful

- **Aug. ‘13**
  - !!
  - Still Negotiating
  - On-track, Sept. Opening
  - Weak retail
  - ✔
  - ✔
  - ✔
  - Conflicting Reports
Actual and Projected Change in Nonfarm Earnings, Cascade County, 2009-2016
Actual and Projected Change in Nonfarm Earnings, Cascade County, 2009-2016

Percent

<table>
<thead>
<tr>
<th>Year</th>
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<th>Projected</th>
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<td>2.7</td>
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<tr>
<td>'11</td>
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<td>'12</td>
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<td>'13</td>
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<tr>
<td>'14</td>
<td>1.6</td>
<td>2.3</td>
</tr>
<tr>
<td>'15</td>
<td>1.6</td>
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<tr>
<td>'16</td>
<td>1.6</td>
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Projected Annual Percent Change in Nonfarm Labor Income (in Constant Dollars) 2013-2016
Federal Gov’t Spending: Local Impacts

By Paul E. Polzin
Director Emeritus
Bureau of Business and Economic Research
The University of Montana
Federal Government Spending, 2010

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Per Capita</th>
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<tbody>
<tr>
<td>U.S.</td>
<td>$3,276,422,000,000</td>
<td>$10,460</td>
</tr>
<tr>
<td>Montana</td>
<td>$10,758,000,000</td>
<td>$10,873</td>
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</table>

<table>
<thead>
<tr>
<th>Top Two</th>
<th>Per Capita</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaska</td>
<td>$17,762</td>
<td>1</td>
</tr>
<tr>
<td>Virginia</td>
<td>17,008</td>
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</table>

<table>
<thead>
<tr>
<th>Bottom Two</th>
<th>Per Capita</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minnesota</td>
<td>$8,366</td>
<td>49</td>
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<tr>
<td>Nevada</td>
<td>7,321</td>
<td>50</td>
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<tr>
<td>Category</td>
<td>Percent of Total</td>
<td>U.S.</td>
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<tr>
<td>--------------------------------</td>
<td>------------------</td>
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<td>Retirement &amp; Disability Payments</td>
<td>28</td>
<td>28</td>
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<tr>
<td>Other Payments to Individuals</td>
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<td>25</td>
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<tr>
<td>Grants</td>
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<td>Procurement</td>
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<td>16</td>
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<td>Salaries and Wages</td>
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### Federal Government Spending Per Capita

<table>
<thead>
<tr>
<th>County</th>
<th>Total Federal Spending</th>
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<tbody>
<tr>
<td><strong>Montana</strong></td>
<td></td>
</tr>
<tr>
<td>Montana</td>
<td>10,873</td>
</tr>
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<tr>
<td>Lewis and Clark</td>
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<tr>
<td>Missoula County</td>
<td>7,490</td>
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<tr>
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<tr>
<td>Daniels County</td>
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<tr>
<td>Roosevelt County</td>
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<tr>
<td>Stillwater County</td>
<td>6,112</td>
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<tr>
<td>Gallatin County</td>
<td>5,886</td>
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</tbody>
</table>

**Rank**

- Montana: 21
- Cascade County: 14
- Flathead County: 50
- Gallatin County: 56
- Lewis and Clark: 3
- Missoula County: 45
- Silver Bow County: 34
- Yellowstone County: 43
- Daniels County: 1
- Roosevelt County: 2
- Stillwater County: 55
- Gallatin County: 56
# Federal Government Spending Per Capita

<table>
<thead>
<tr>
<th>County</th>
<th>Dollars</th>
<th>Rank</th>
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<td>Lewis and Clark</td>
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<tr>
<td>Missoula County</td>
<td>2,847</td>
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<tr>
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<tr>
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<td>Toole County</td>
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## Federal Government Spending Per Capita

<table>
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<th>County</th>
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# Federal Government Spending Per Capita

<table>
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<th></th>
<th>Grants</th>
<th>Rank</th>
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<td>County</td>
<td>Dollars</td>
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**Top Two**
- Roosevelt County: 6,785
- Glacier County: 3,675

**Bottom Two**
- Fallon County: 71
- Sweet Grass County: 67
## Federal Government Spending Per Capita

<table>
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<tr>
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<th>Wages and Salaries</th>
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Federal Government Spending

Statistical Predictors of Per Capita Federal Spending:

• Poverty
• Population Density
• Reservation
• Percent over 65
• Per Capita Income
• Square Miles
Per Capita Federal Government Spending by County
Actual vs. Predicted, 2010
Per Capita Federal Spending by Category, Montana Predicted vs. Actual, 2010

Total Spending per Capita: $10,871
Per Capita Federal Spending by Category, Cascade County
Predicted vs. Actual, 2010

Total Spending per Capita: $12,575
Questions?