

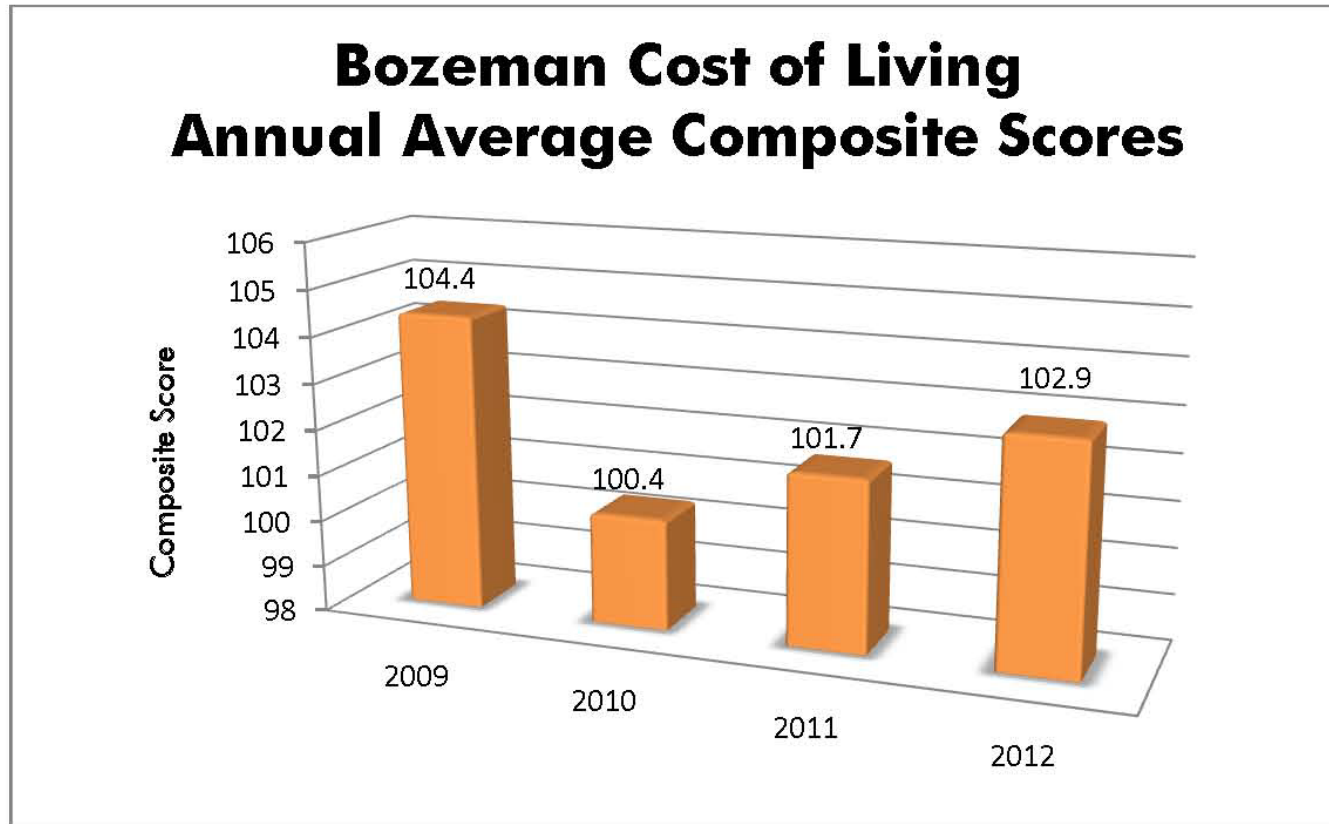
Local Economy Metrics

Workforce Needs ~ Health Care and Beyond

Future Economic Development Drivers

Helping Business Prosper

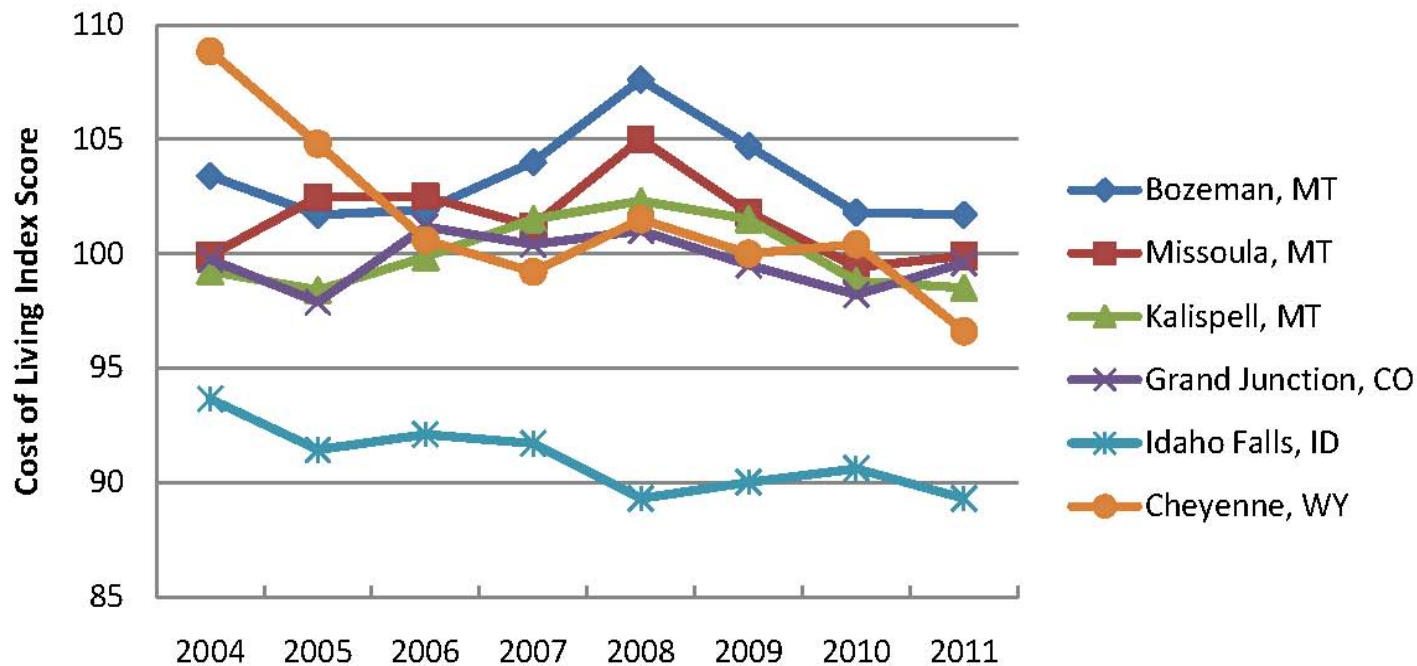
Cost of Living Index



Source: C2ER Cost of Living Index, Quarterly Reports.

Cost of Living Index

Regional Cost of Living Comparison Historical Composite Scores



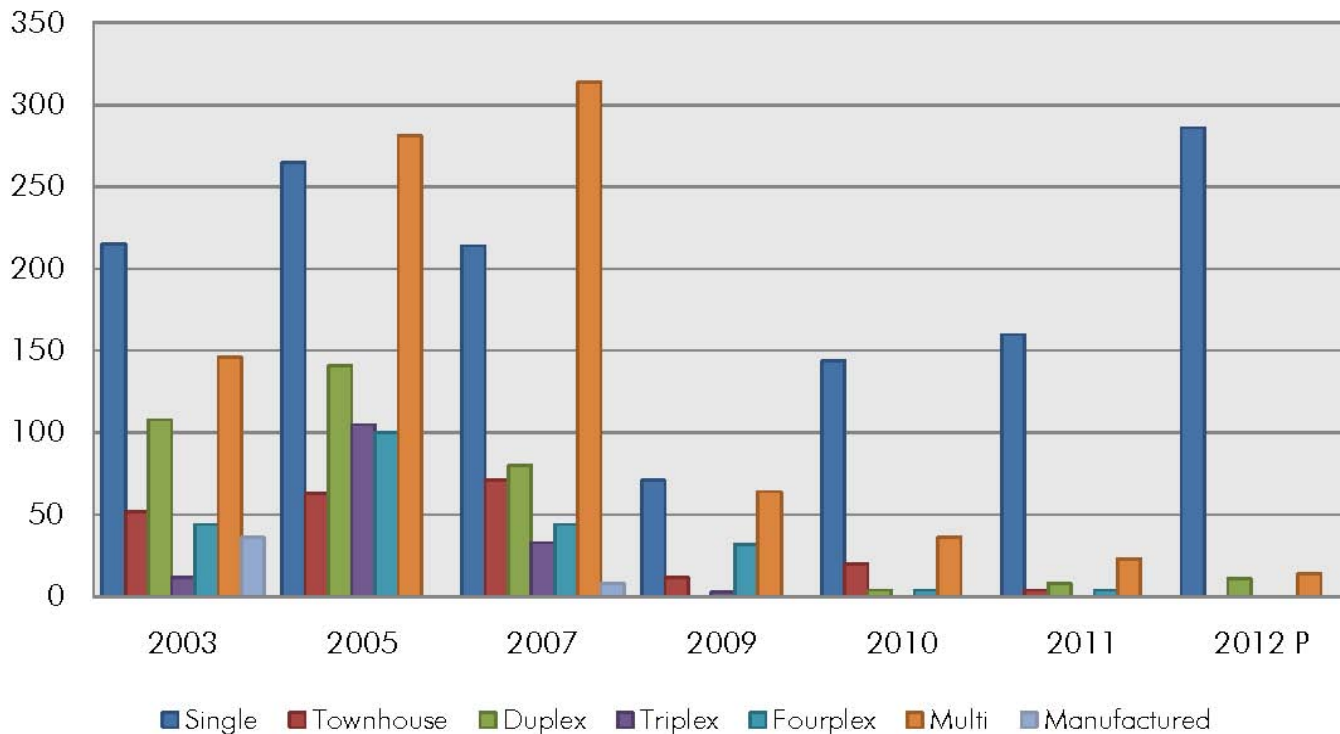
Source: C2ER Cost of Living Index, Quarterly Reports. Please note that the Cost of Living Index does not measure inflation, or price change over time. Rather the Index measures the relative cost of living in an area as it compares to the other areas studied in that particular quarter.

Metropolitan Economic Strength Rankings

Montana Metropolitan Areas	2005	2006	2007	2008	2009	2010	2011	2012
Bozeman	9	10	8	8	6	7	7	9
Butte-Silver Bow	286	191	123	67	51	27	17	25
Havre	541	478	440	421	391	306	284	264
Helena	14	7	23	13	9	6	2	2
Kalispell	134	103	63	51	26	35	45	87

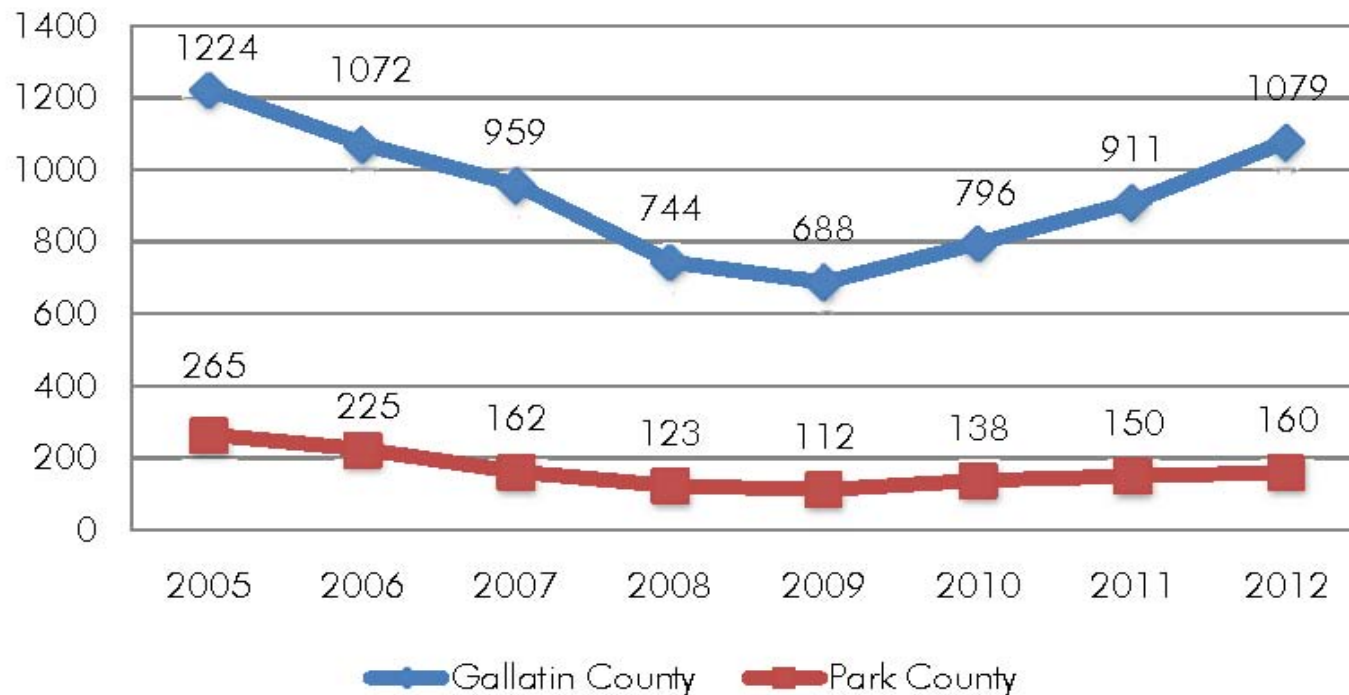
Source: Policom

Residential Building Permit Activity Bozeman 2003-2012



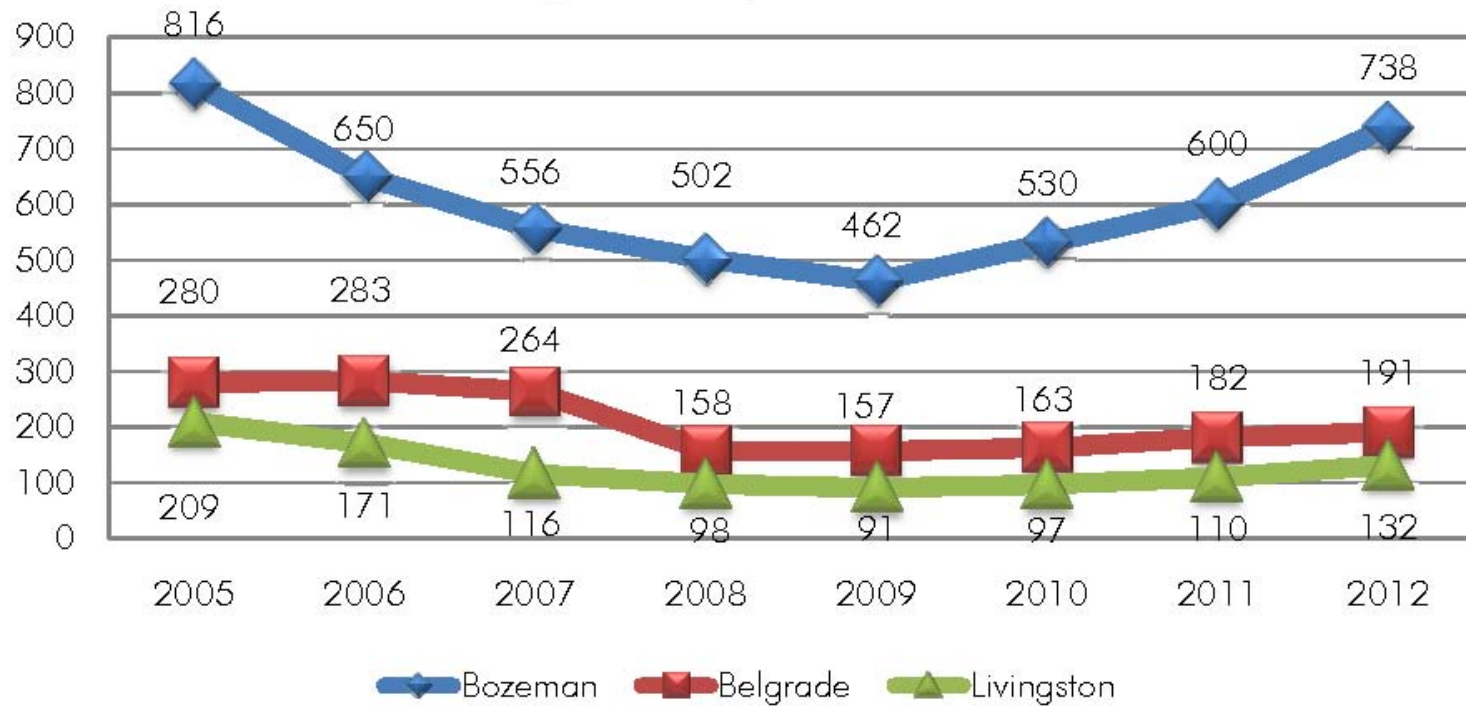
Source: City of Bozeman Department of Planning & Community Development 2011 Annual Report and 2012 Building Inspection Division Monthly Building Permit Reports. P denotes preliminary.

Number of Houses Sold Single Family Residences



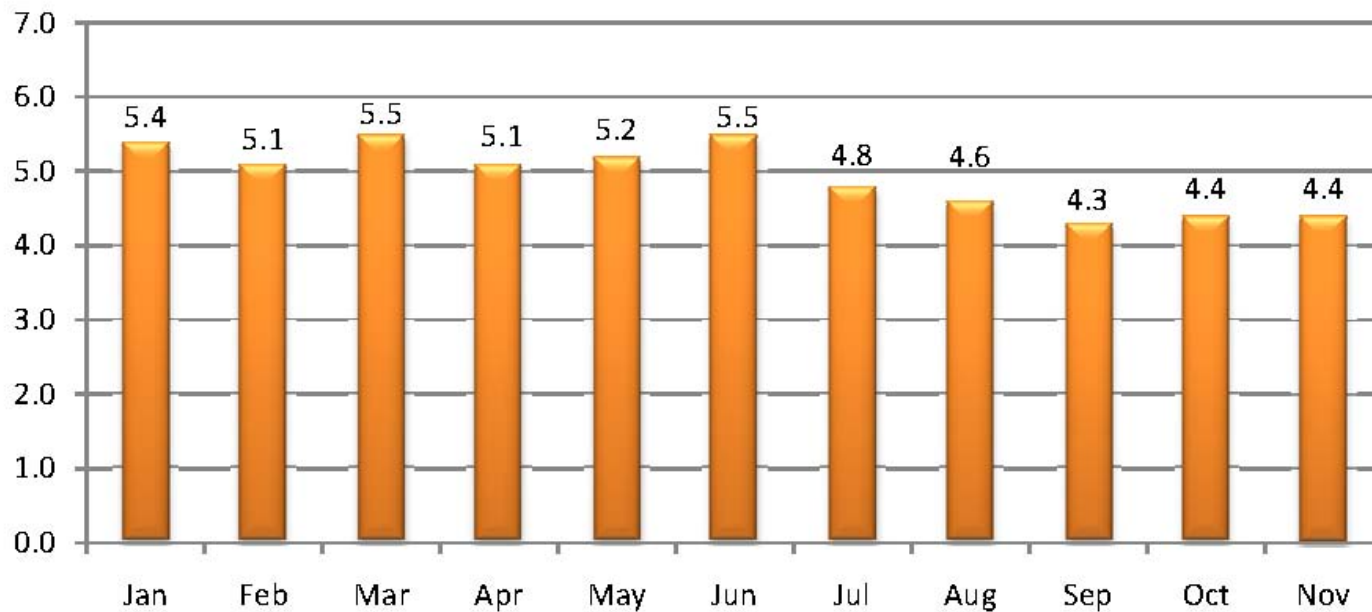
Source: Gallatin Association of Realtors – Southwest Montana Multiple Listing Service.

Number of Houses Sold Single Family Residences



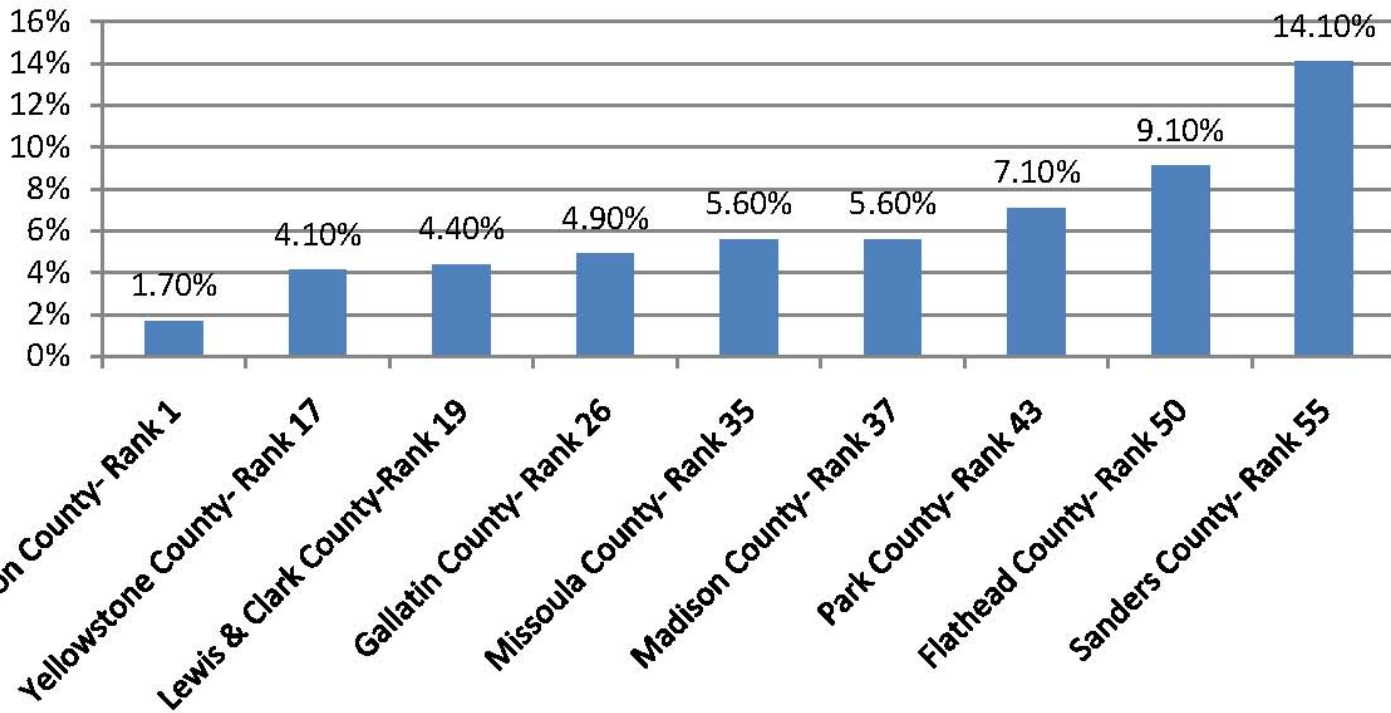
Source: Gallatin Association of Realtors – Southwest Montana Multiple Listing Service.

Monthly Unemployment Rate Bozeman 2012



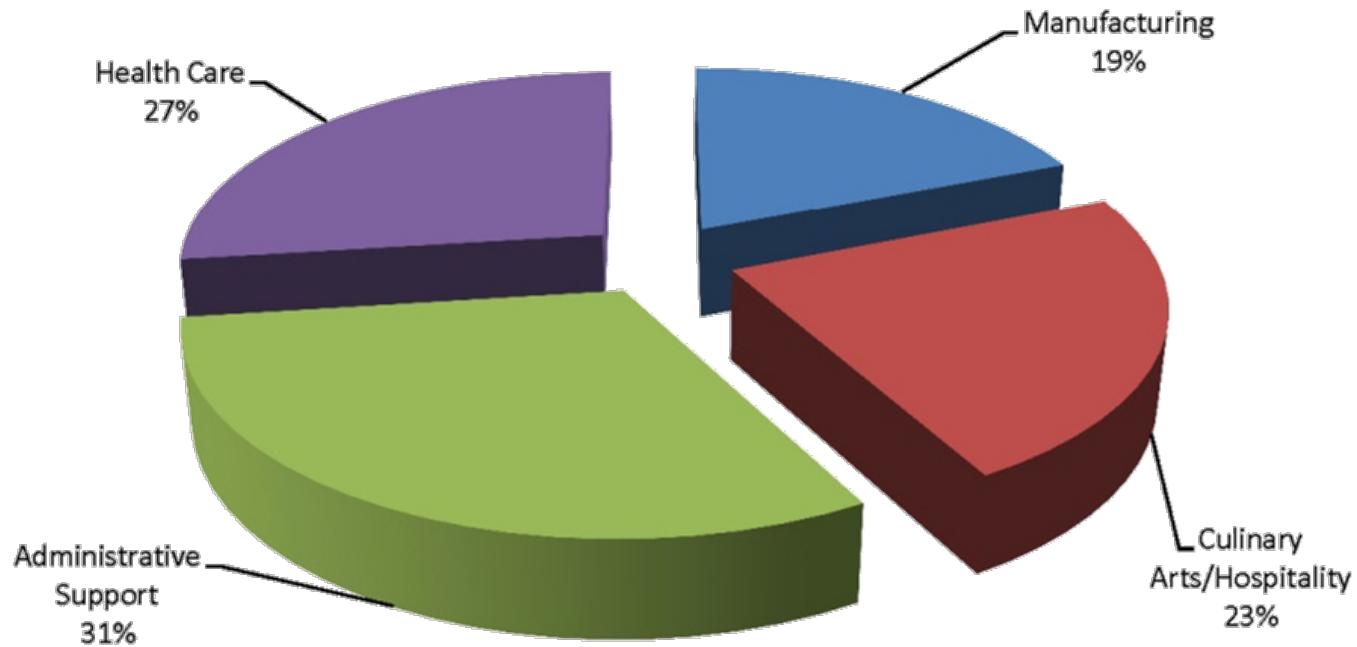
Source: *Bureau of Labor Statistics, Local Area Unemployment Statistics; not seasonally adjusted*

Montana County Unemployment Rate



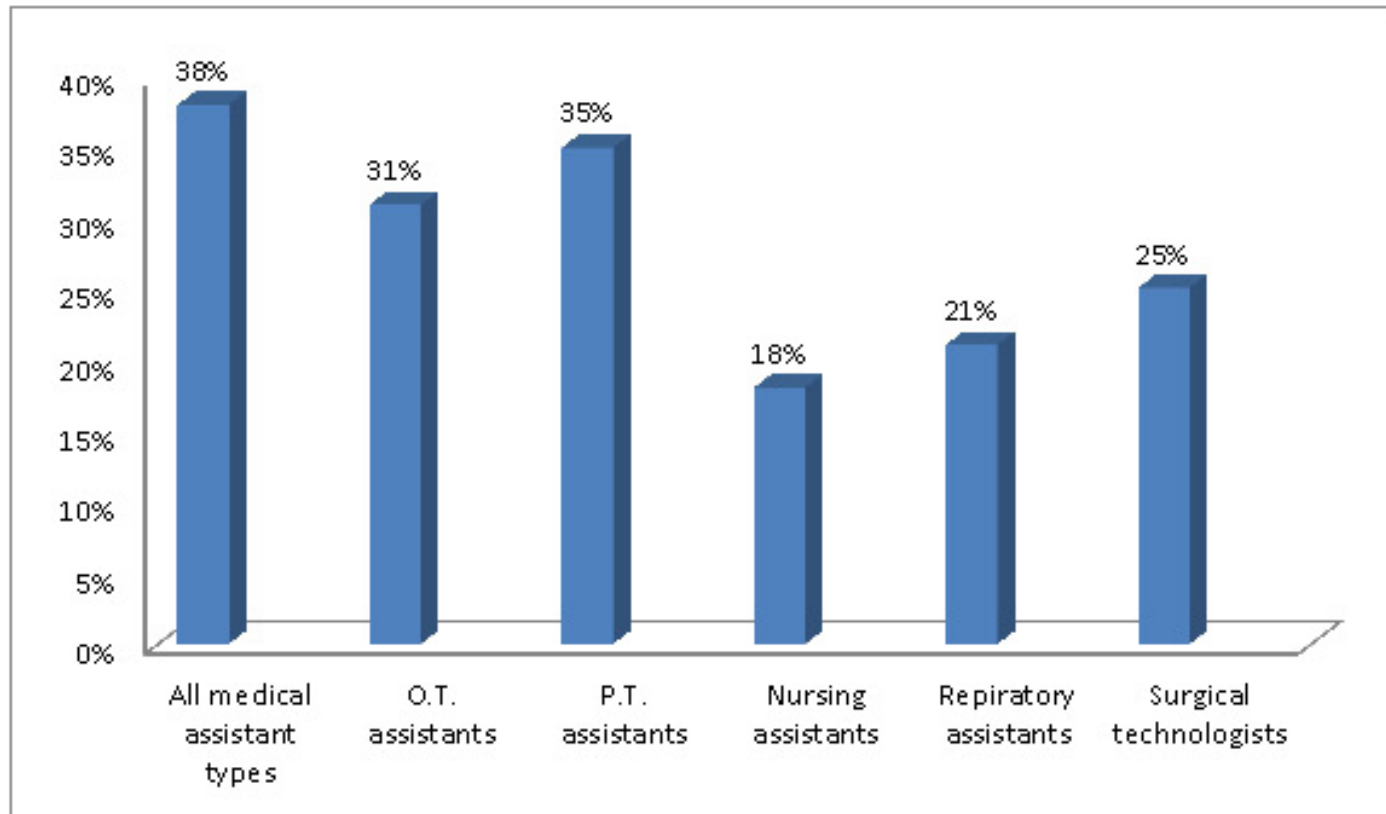
Source: Bureau of Labor Statistics

Sectors with the Most Annual Open Positions



Source: *Bureau of Labor Statistics*

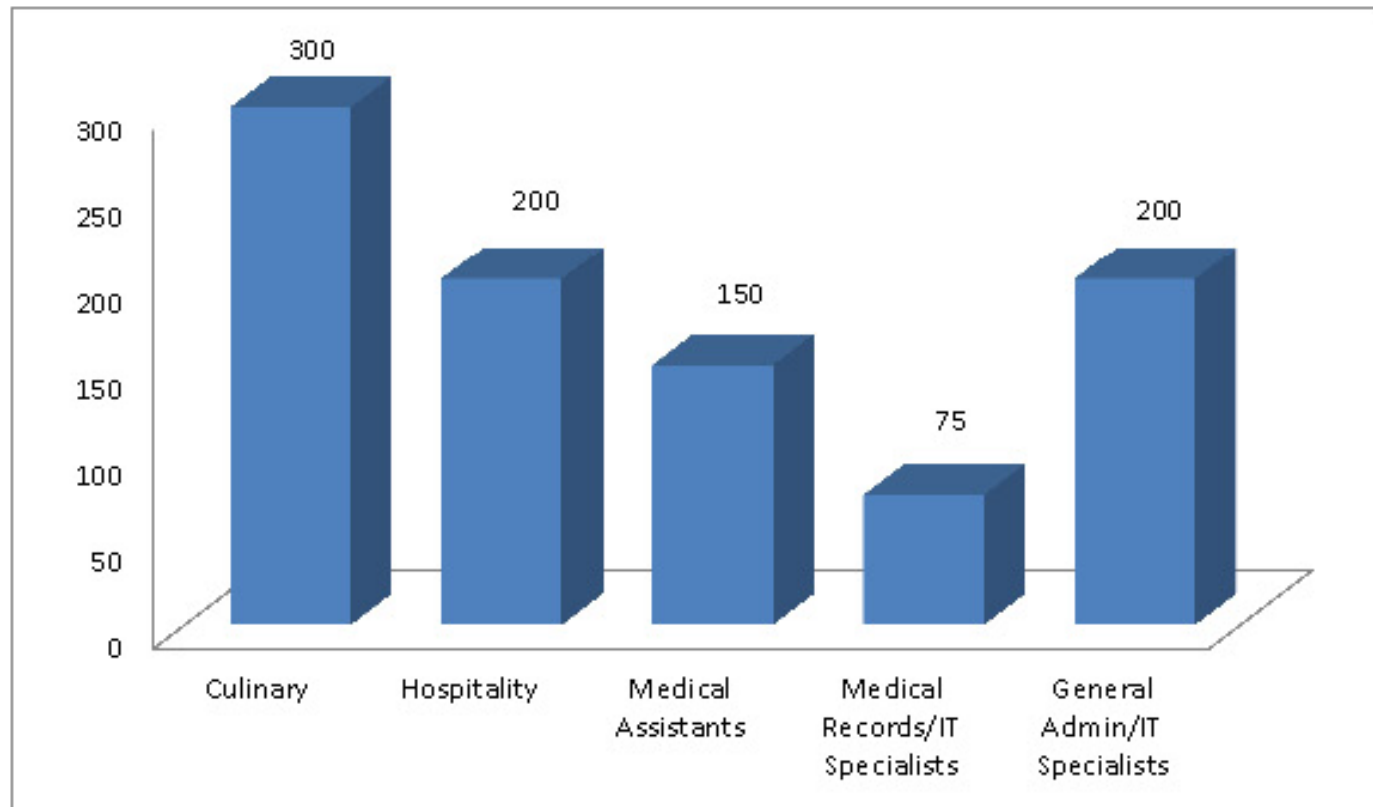
Medical Assistant Jobs: % Growth through 2018



Source: *US Department of Labor Occupational Data*

Estimated Annual Workforce Needs Summary

Number of Graduates (2 year program +)



Source: *Gallatin College Workforce Needs Assessment study*

Bozeman Deaconess Hospital

- Supports over 2,300 jobs in Gallatin and surrounding counties and more than 2,500 statewide.
- Provides over \$8 million in Charity Care and Medicaid for the community.
- Economic driver that generates over \$300 million dollar economic impact in our region.



Community Economic Development Projects

Gardiner Gateway Project

Big Sky Trust Fund – Preliminary Engineering Report

Project objectives being addressed:

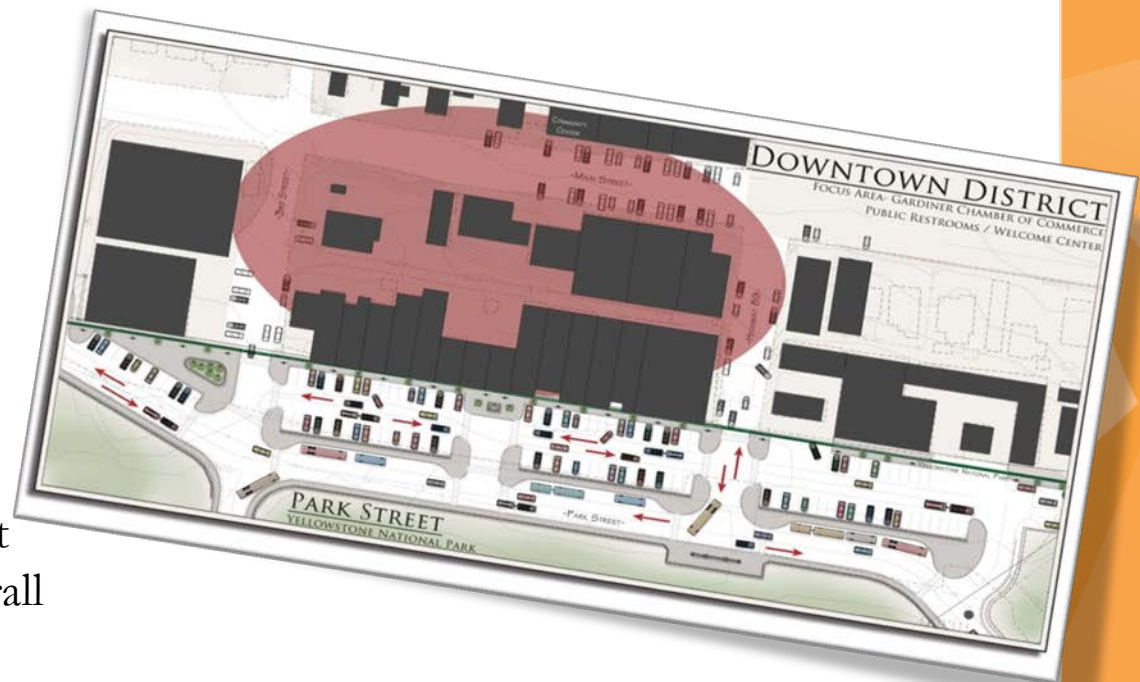
- Infrastructure – utilities
- Storm water runoff
- Pedestrian safety
- Improved traffic flow

Impact:

- Projected \$4.5 million capital improvement project in Gardiner's Downtown District
- \$27 million dollar project overall

Partners:

State of Montana, Park County, Yellowstone National Park, Greater Gardiner Community Council, and the Gardiner Chamber of Commerce



Community Economic Development Projects

North Park Redevelopment

Potential 20-30 year build out:

- Light Industrial 790,000 sf
- Flex Space 468,500 sf
- Office Space 72,000 sf
- Retail 270,000 sf
- Hotel 90 rooms

Impact:

- Phase I - Projected \$5.4 million capital improvement infrastructure project

Partners:



Community Economic Development Projects



Innovation Campus

Currently:

15 Buildings

35 companies

Approx. 200 employees

20 year build out goals:

100 new companies

Approx. 1,000 new employees





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Helping Business Prosper



**Even if you are on the right
you will get run over if you track
if you just sit there.**

~ Will Rogers