



# Local Outlook: Hill County

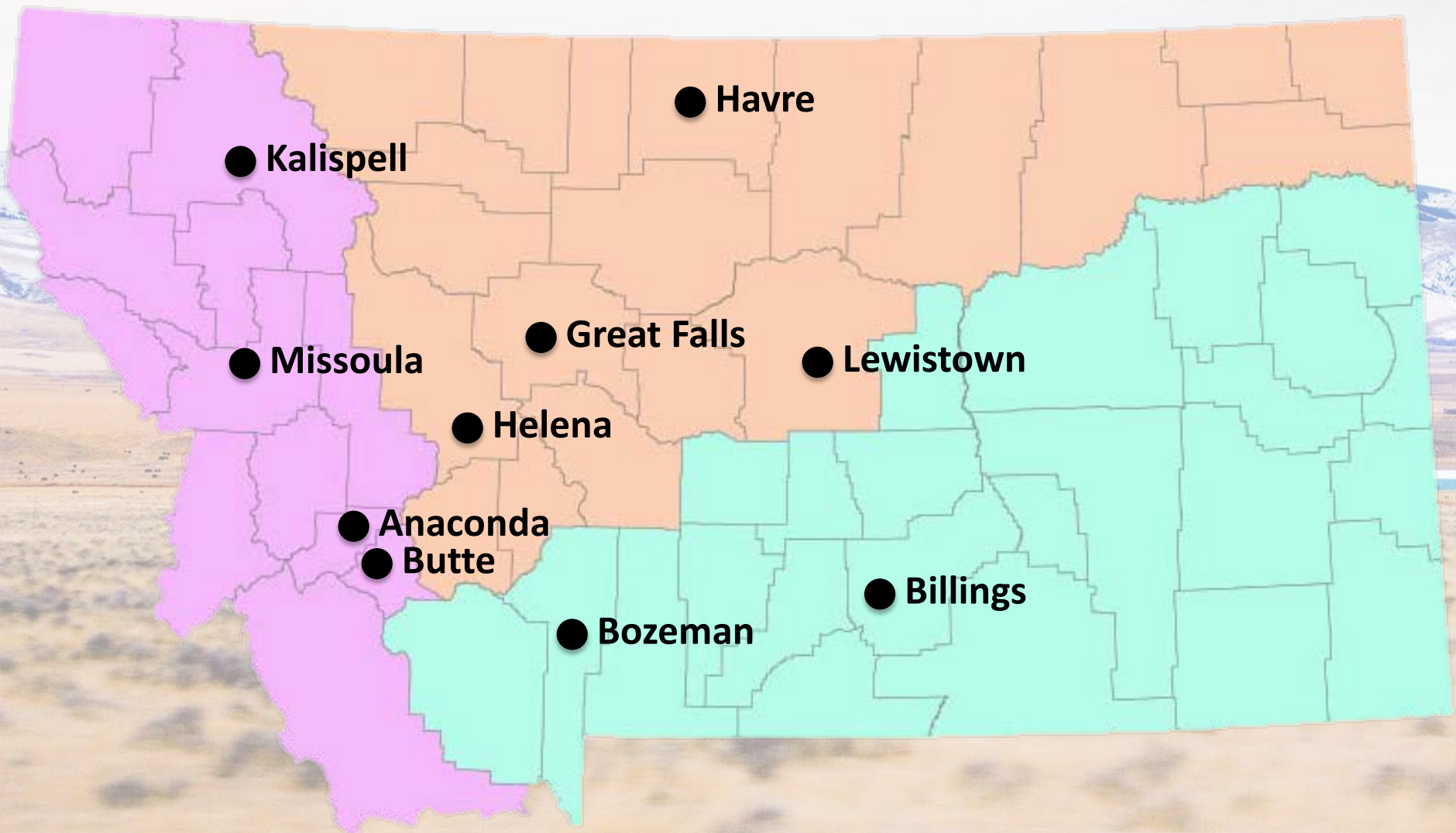
By Paul E. Polzin

Director Emeritus

Bureau of Business and Economic Research

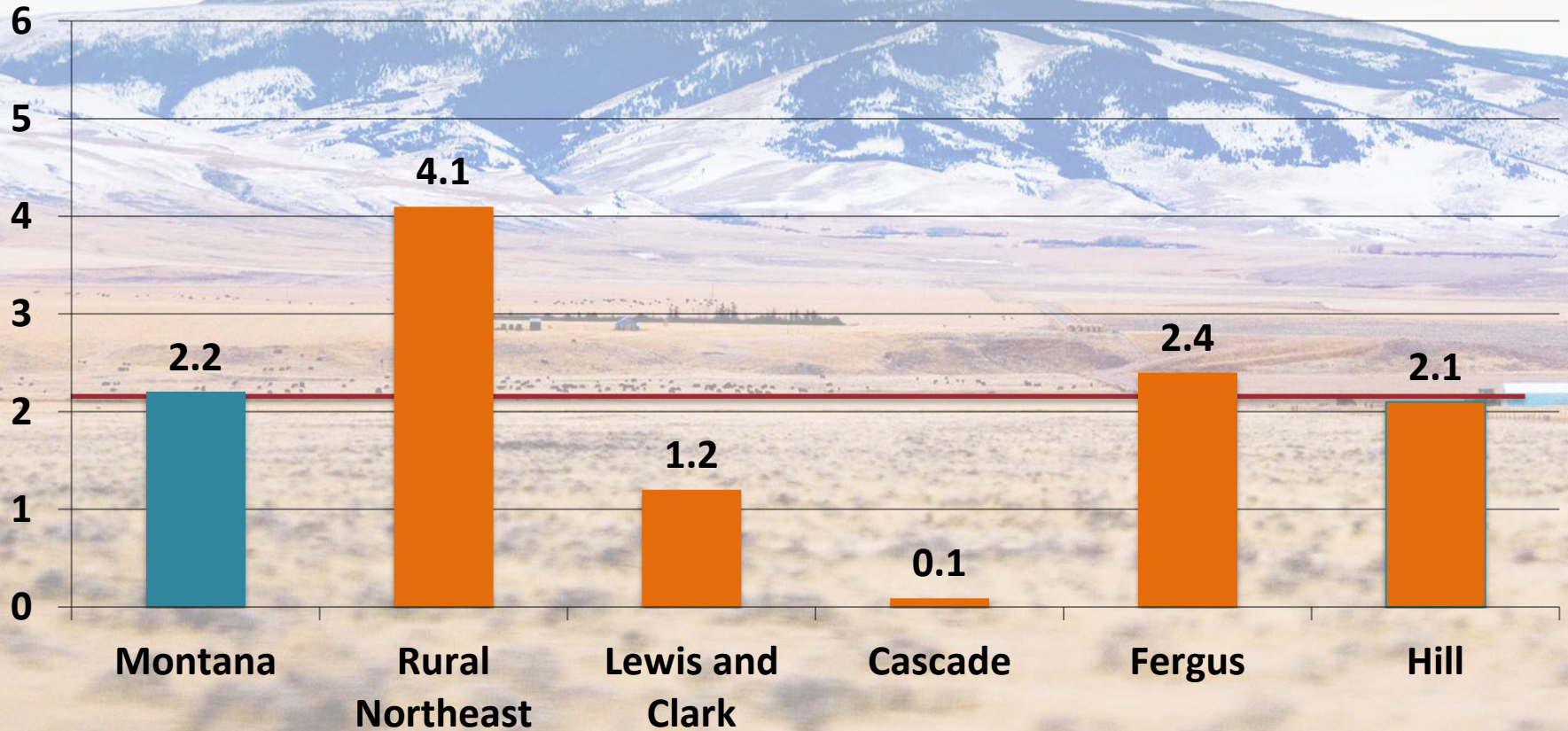
The University of Montana

# Montana's Economic Regions



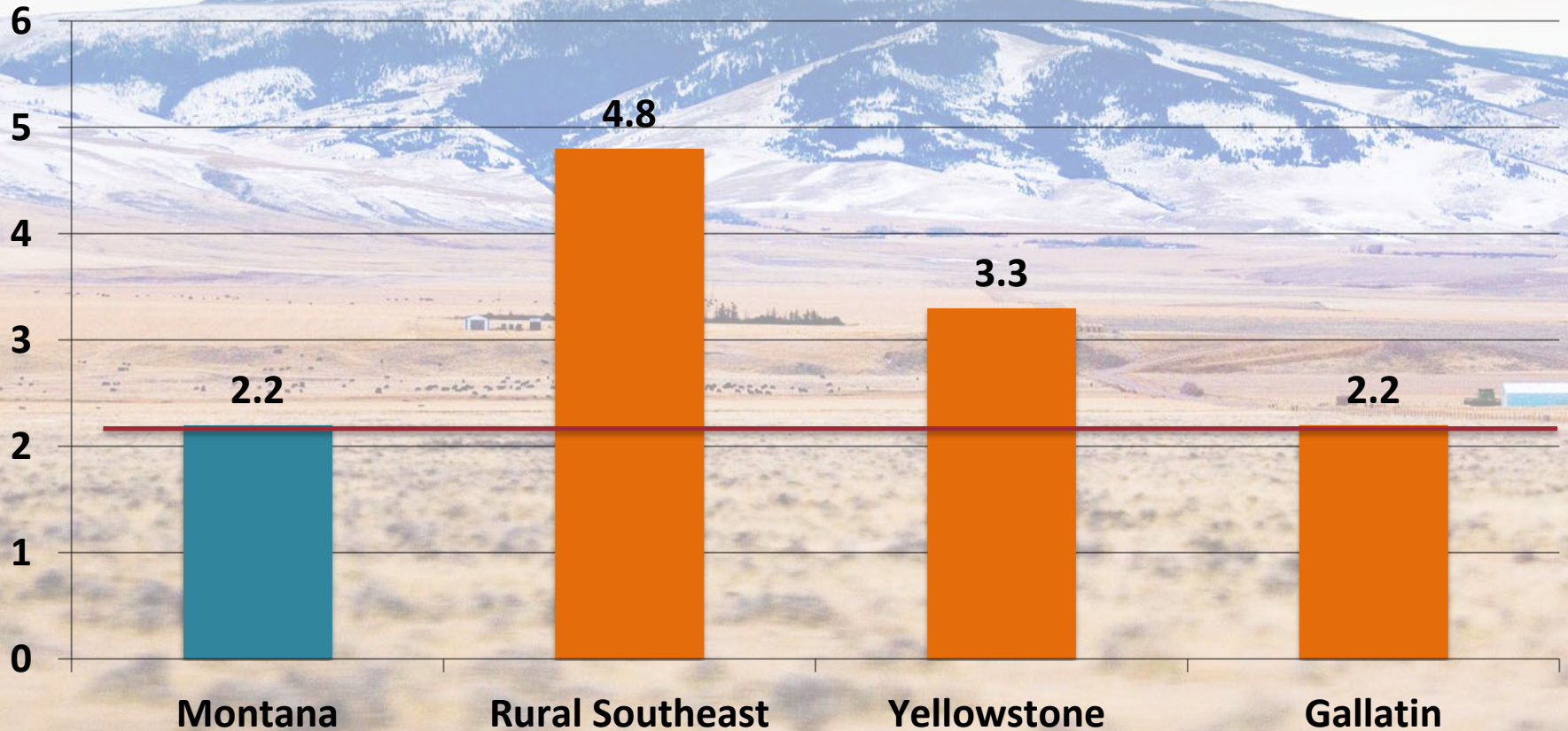
# Annual Percent Change in Nonfarm Labor Income (in Constant Dollars), 2009-2013

Percent



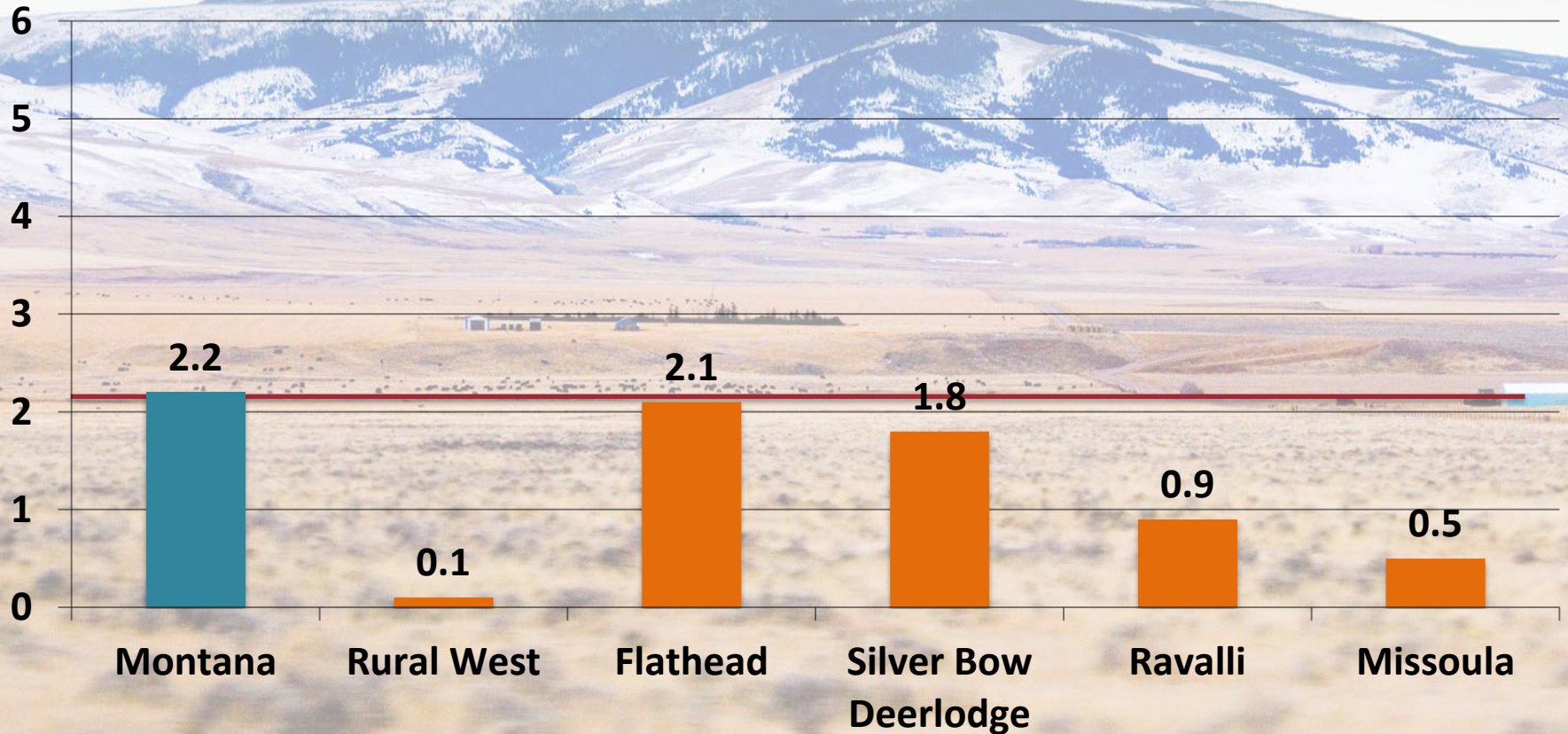
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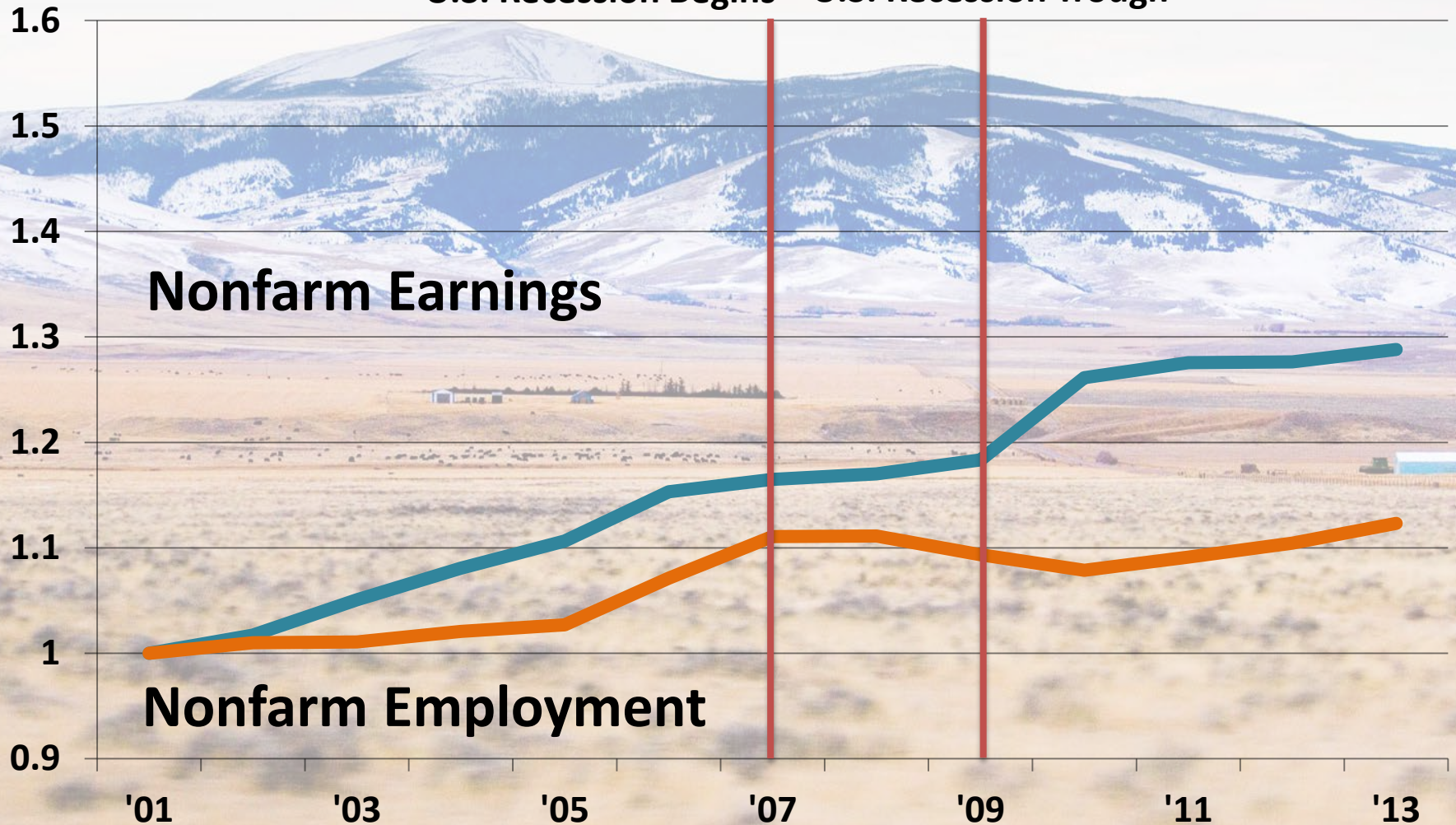
# Annual Percent Change in Nonfarm Labor Income (in Constant Dollars), 2009-2013

Percent



# Inflation Adjusted Nonfarm Earnings and Nonfarm Employment, Hill County, 2001-2013

U.S. Recession Begins    U.S. Recession Trough



# Hill County's Economic Base 2011-2013

- Travel, Other 4%
- Manufacturing, Communication 8%
- Oil & Gas 7%
- Federal Government 14%
- State Government 13%
- Ag and Related 26%
- Railroad 28%

Modest Growth  
Stable

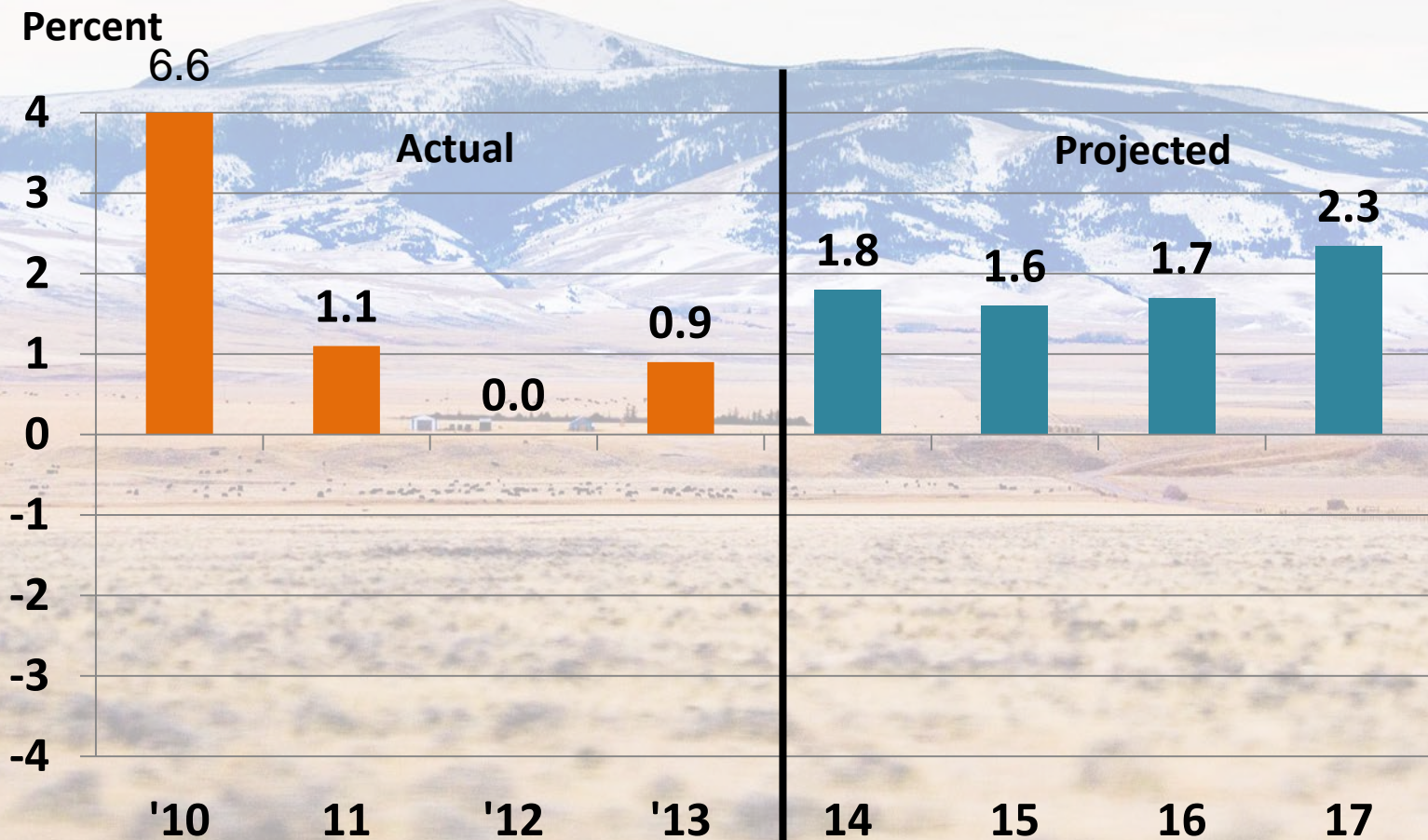
Low gas prices  
Stable, at best

Pay Freeze Over

Slightly weaker

BNSF hiring, how many  
local?

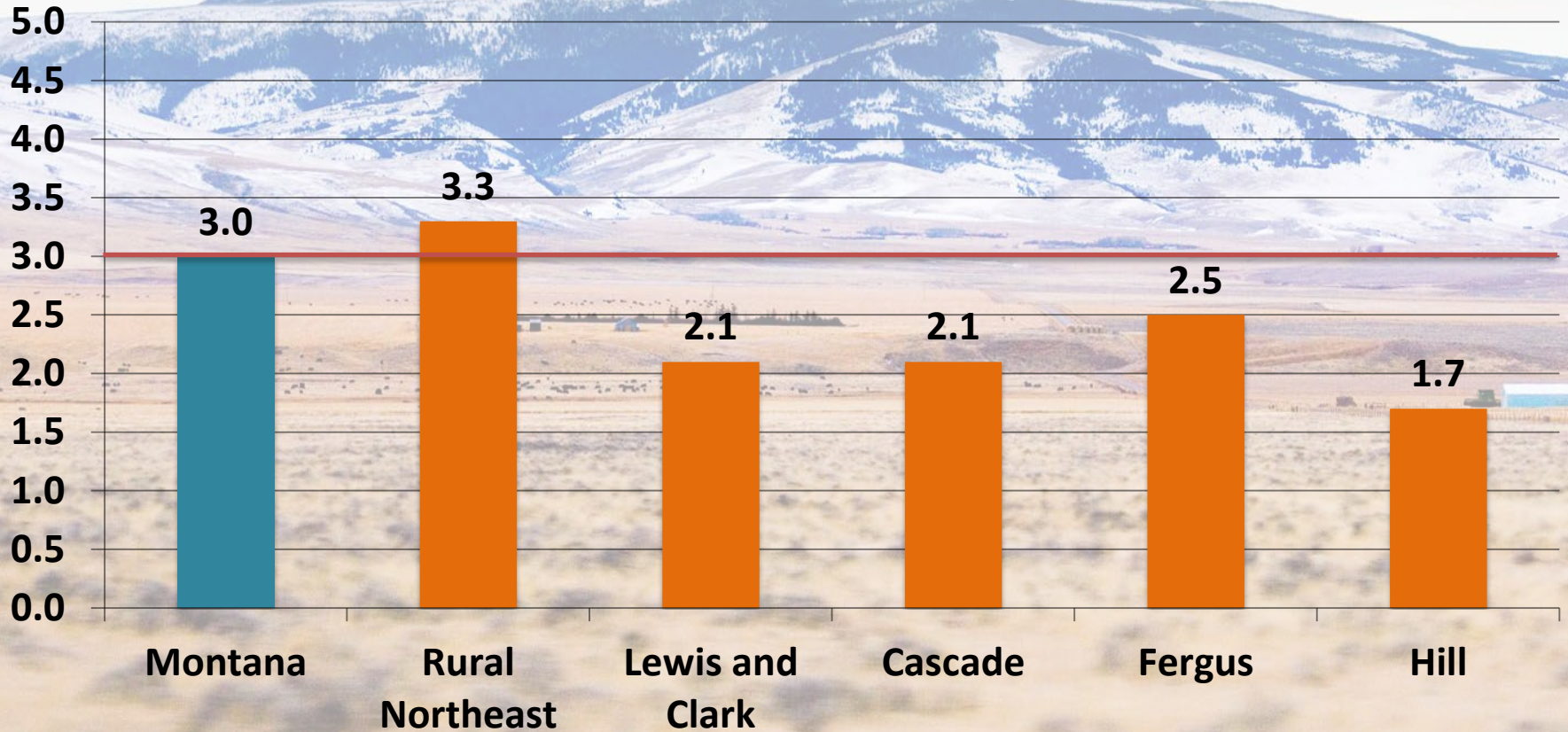
# Actual and Projected Change in Nonfarm Earnings, Hill County , 2010-2017





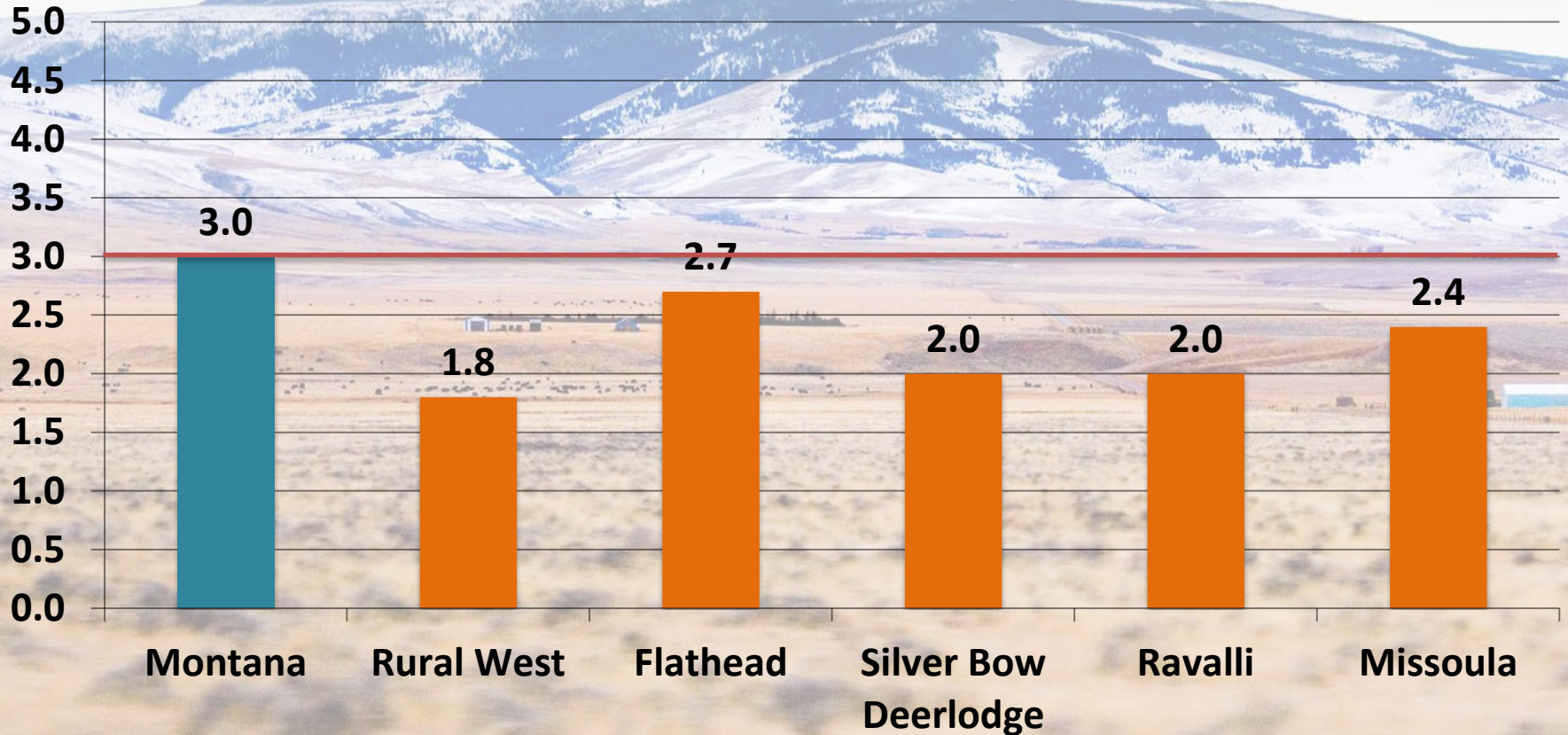
# Projected Annual Percent Change In Nonfarm Labor Income (in constant dollars), 2014-2017

Percent



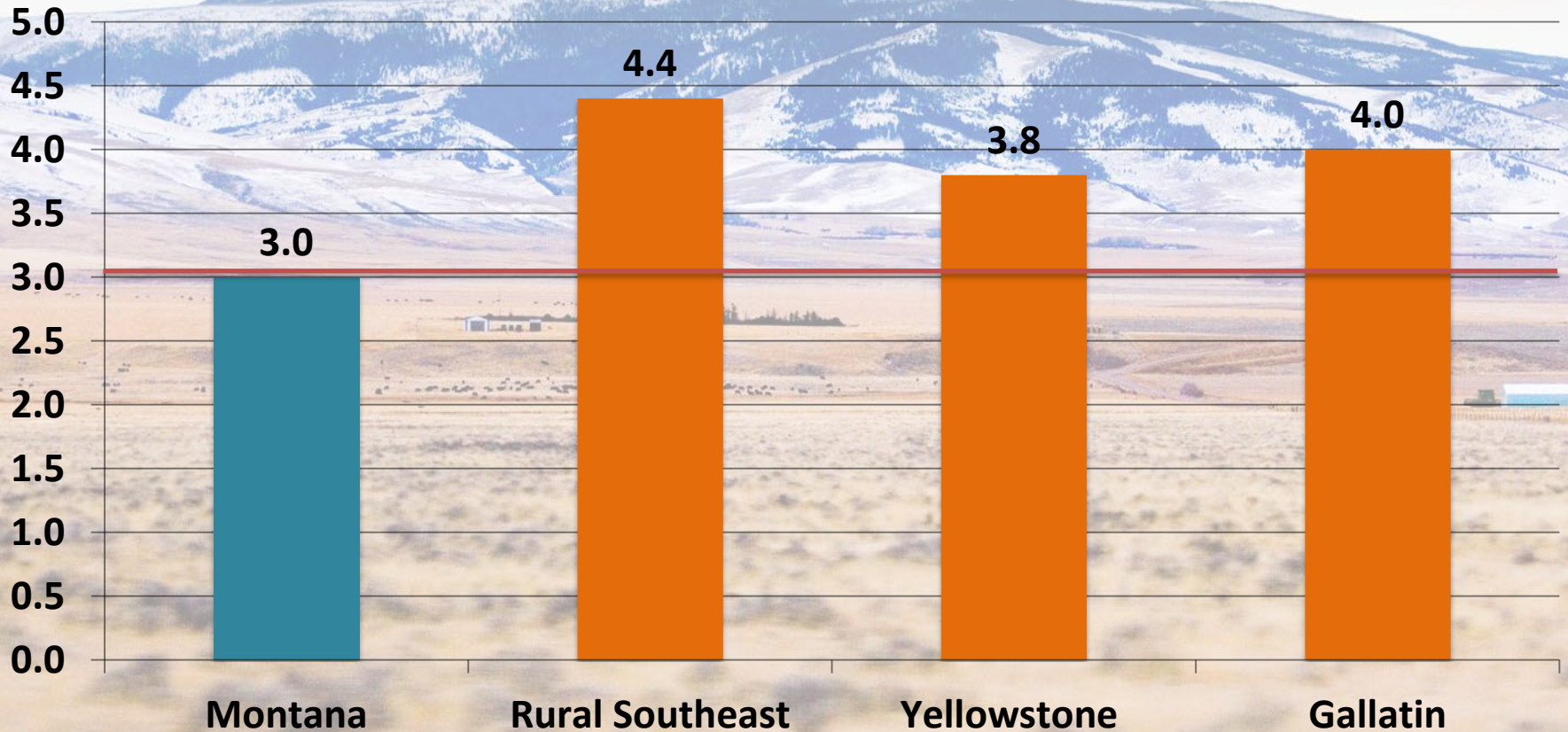
# Projected Annual Percent Change In Nonfarm Labor Income (in constant dollars), 2014-2017

Percent



# Projected Annual Percent Change In Nonfarm Labor Income (in constant dollars), 2014-2017

Percent



# Economic Trends in The Bakken

By Paul E. Polzin

Natural Resource and Energy Research  
Program

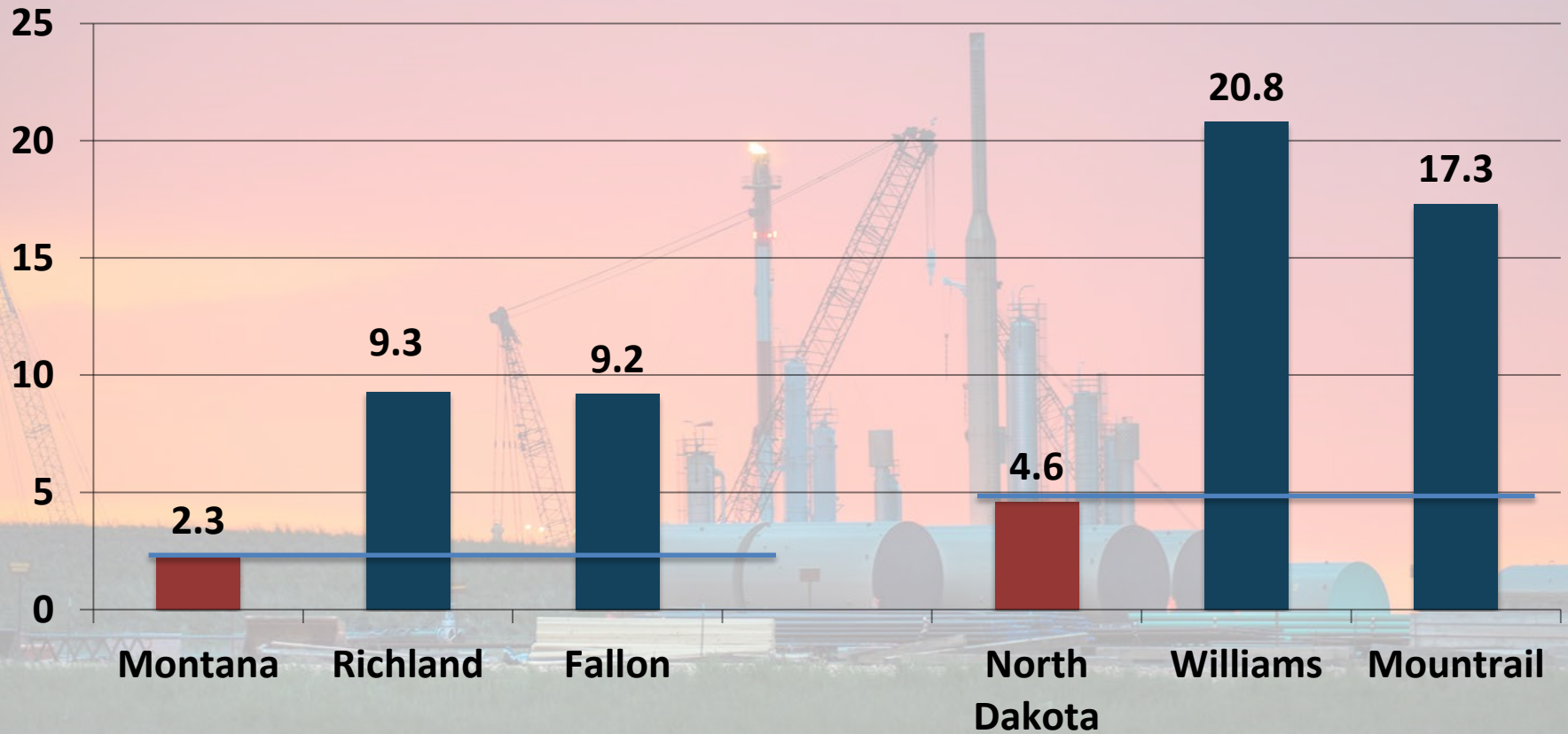
Bureau of Business and Economic Research  
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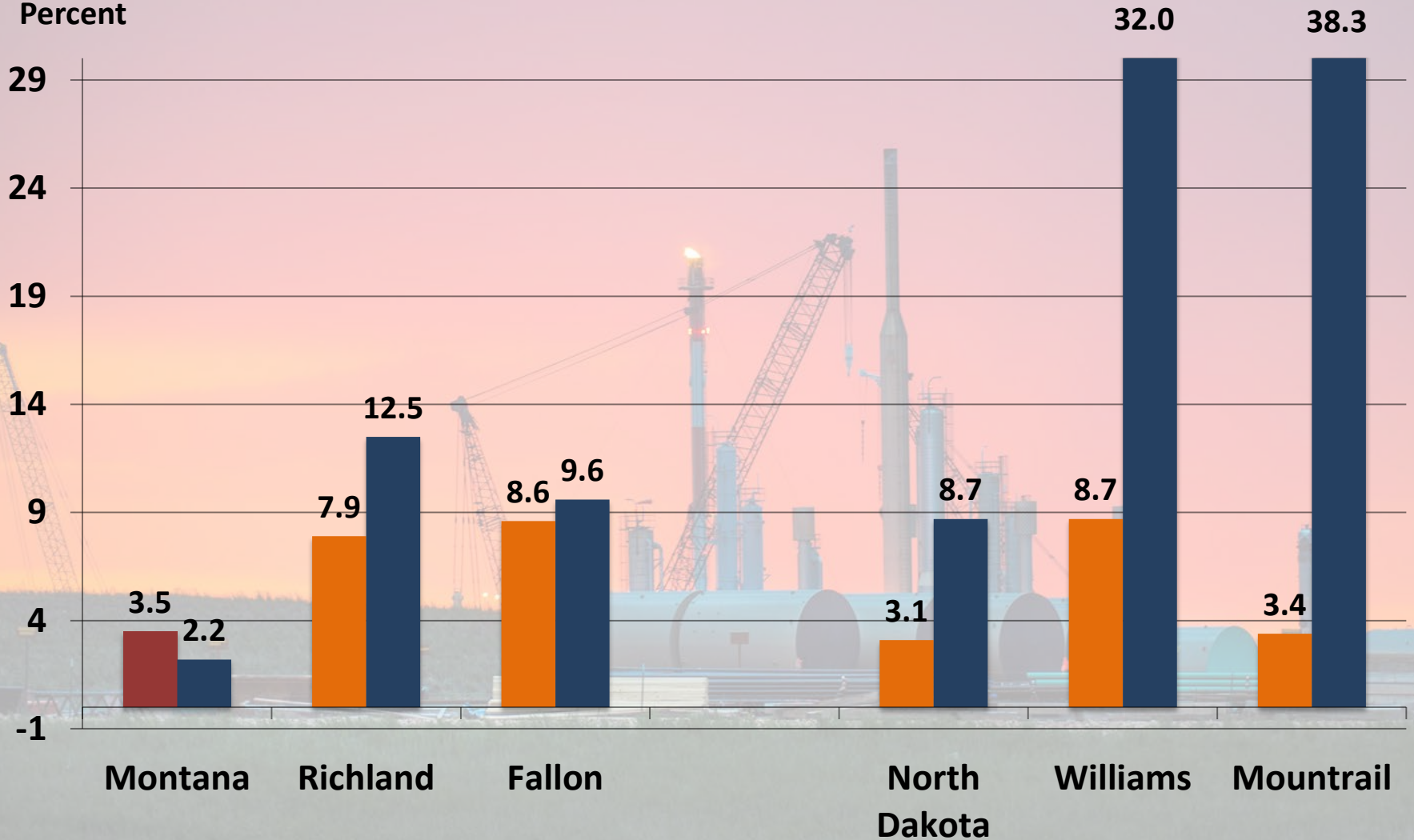
# Annual Percent Change in Nonfarm Earnings (in Constant Dollars), 2001-2012

Percent

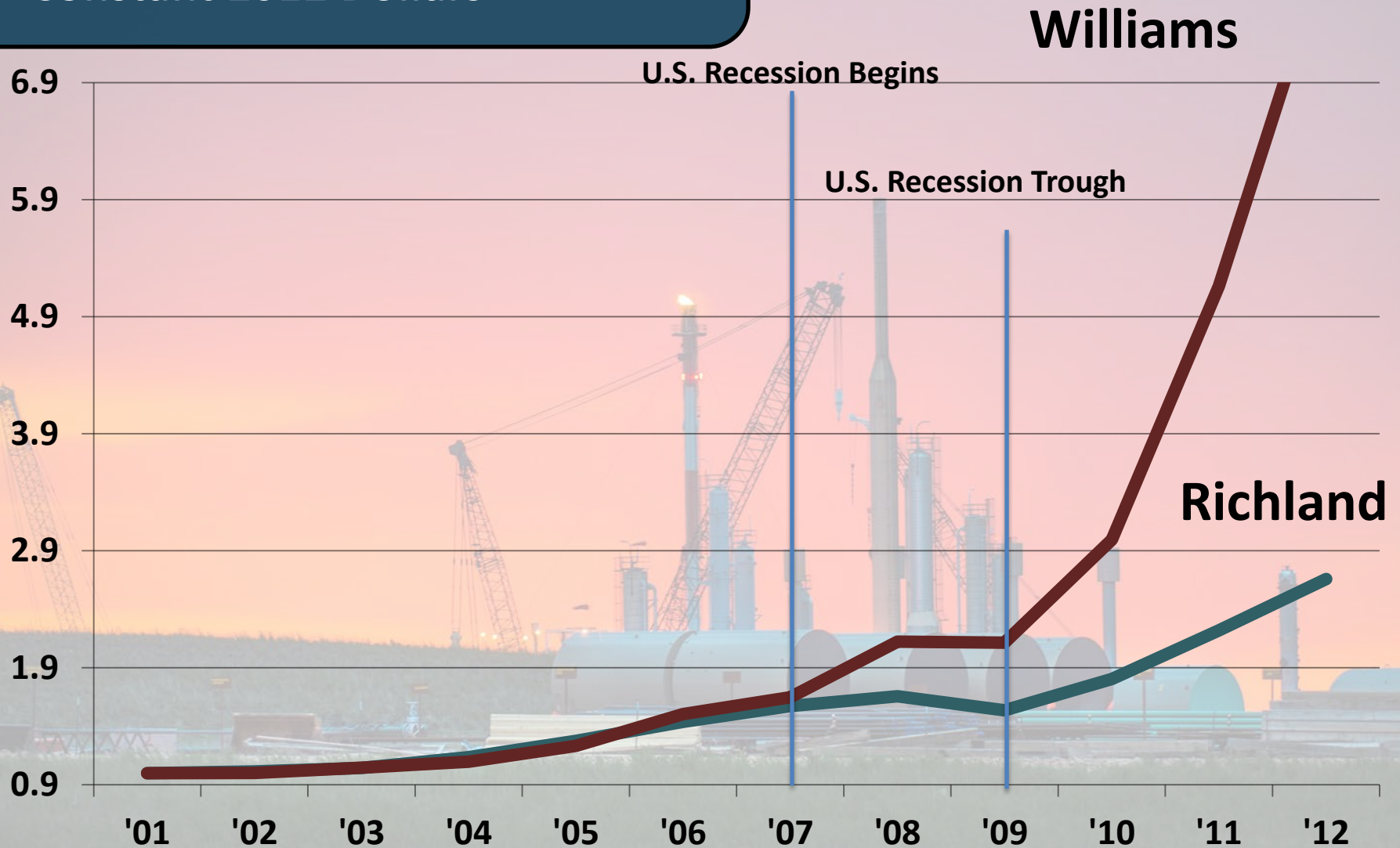


# Annual Percent Change in Nonfarm Earnings (in Constant Dollars), 2001-07 and 2008-12

Percent

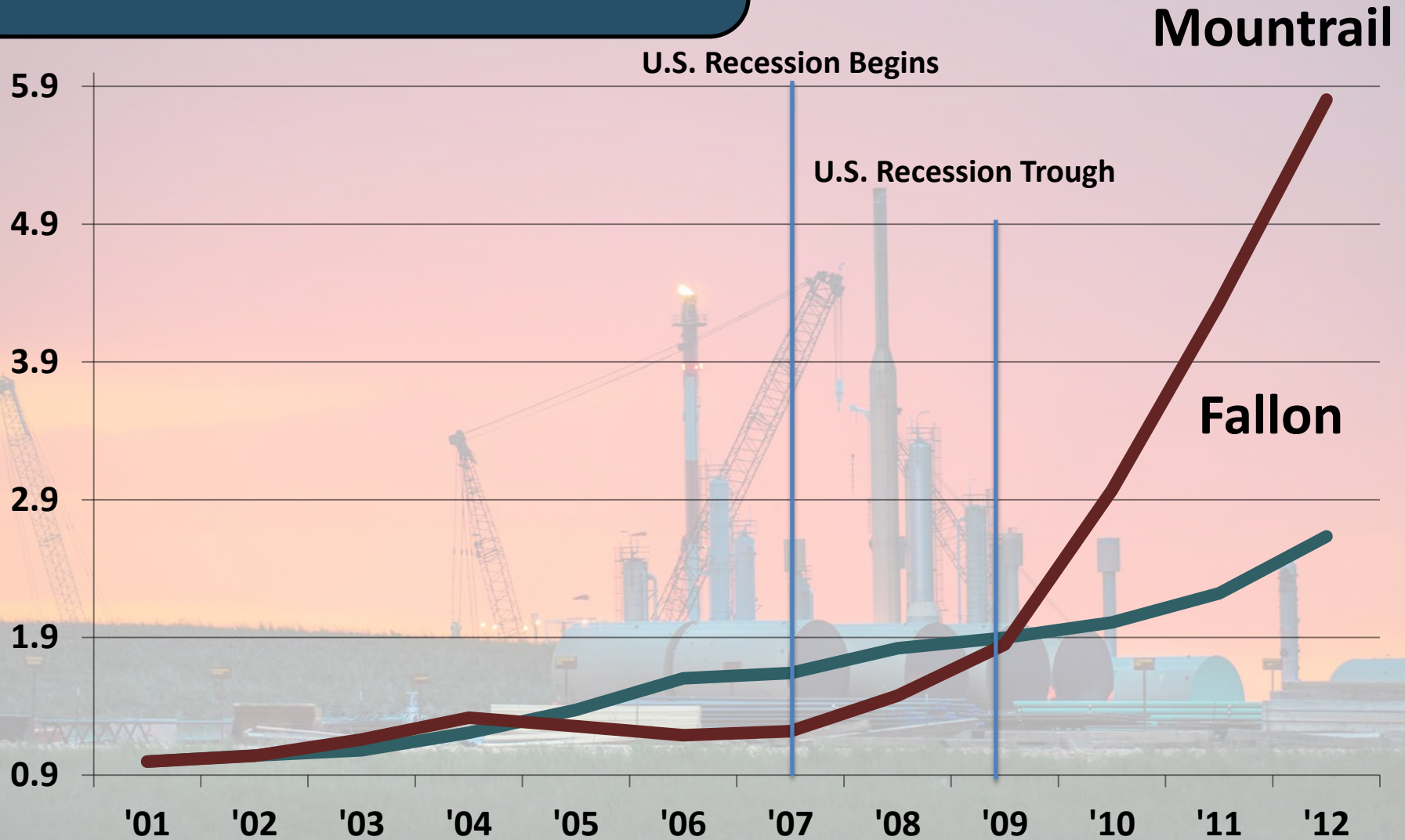


# Nonfarm Earnings, Richland and Williams Counties, Constant 2012 Dollars



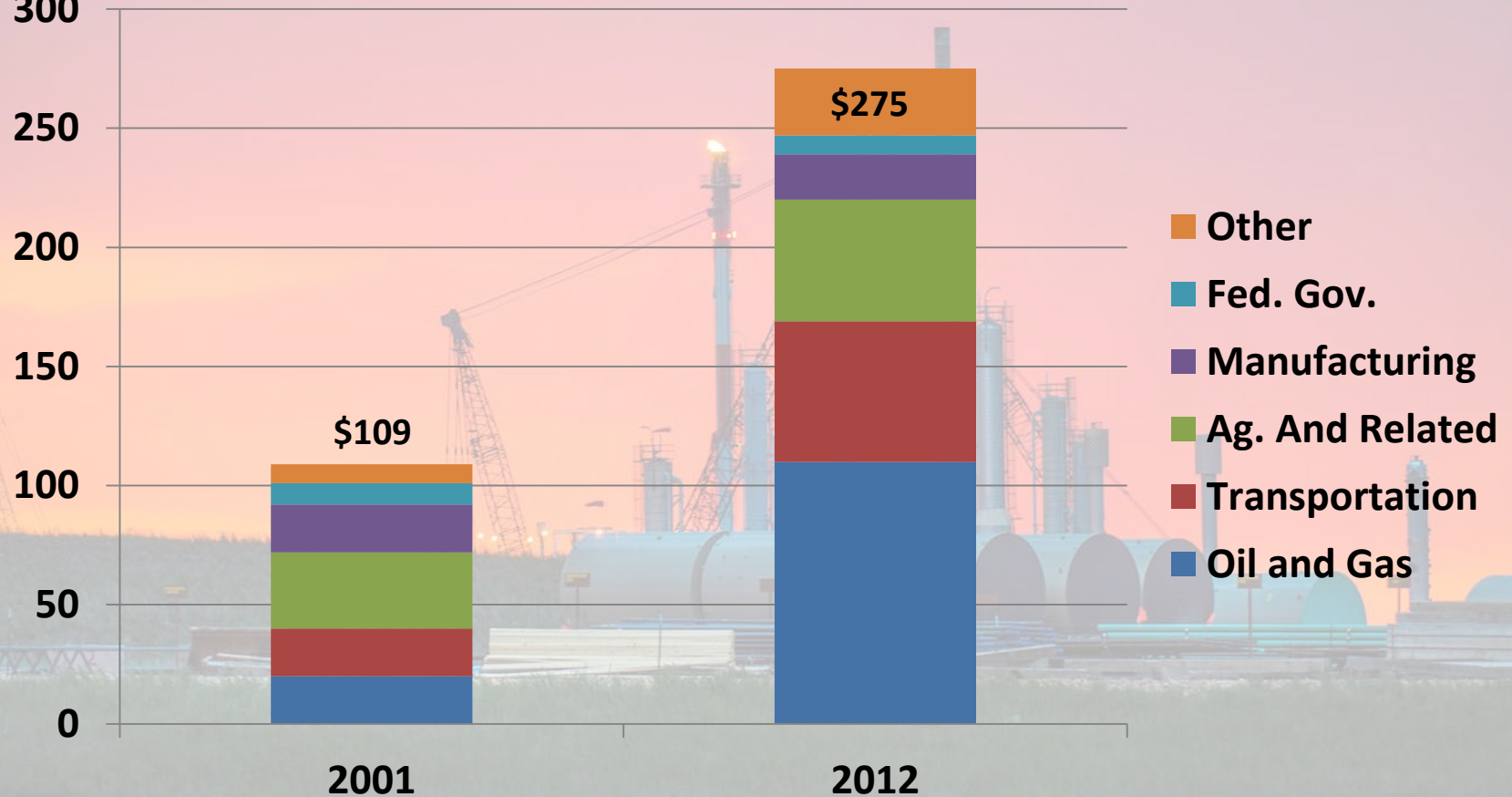


# Nonfarm Earnings, Fallon and Mountrail Counties, Constant 2012 Dollars



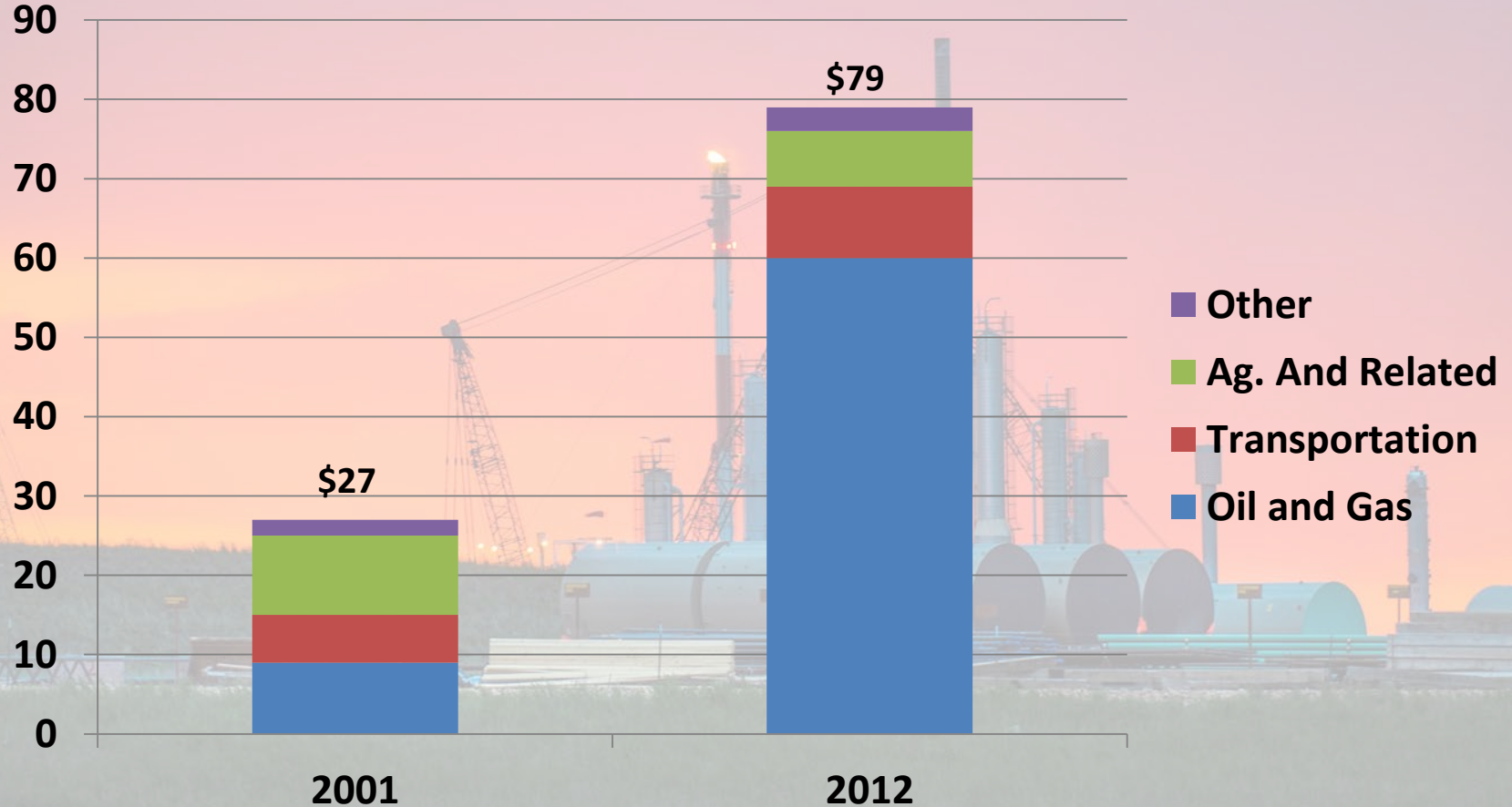
# Richland County's Economic Base 2001-2012

Mil. Of 2012 \$  
300



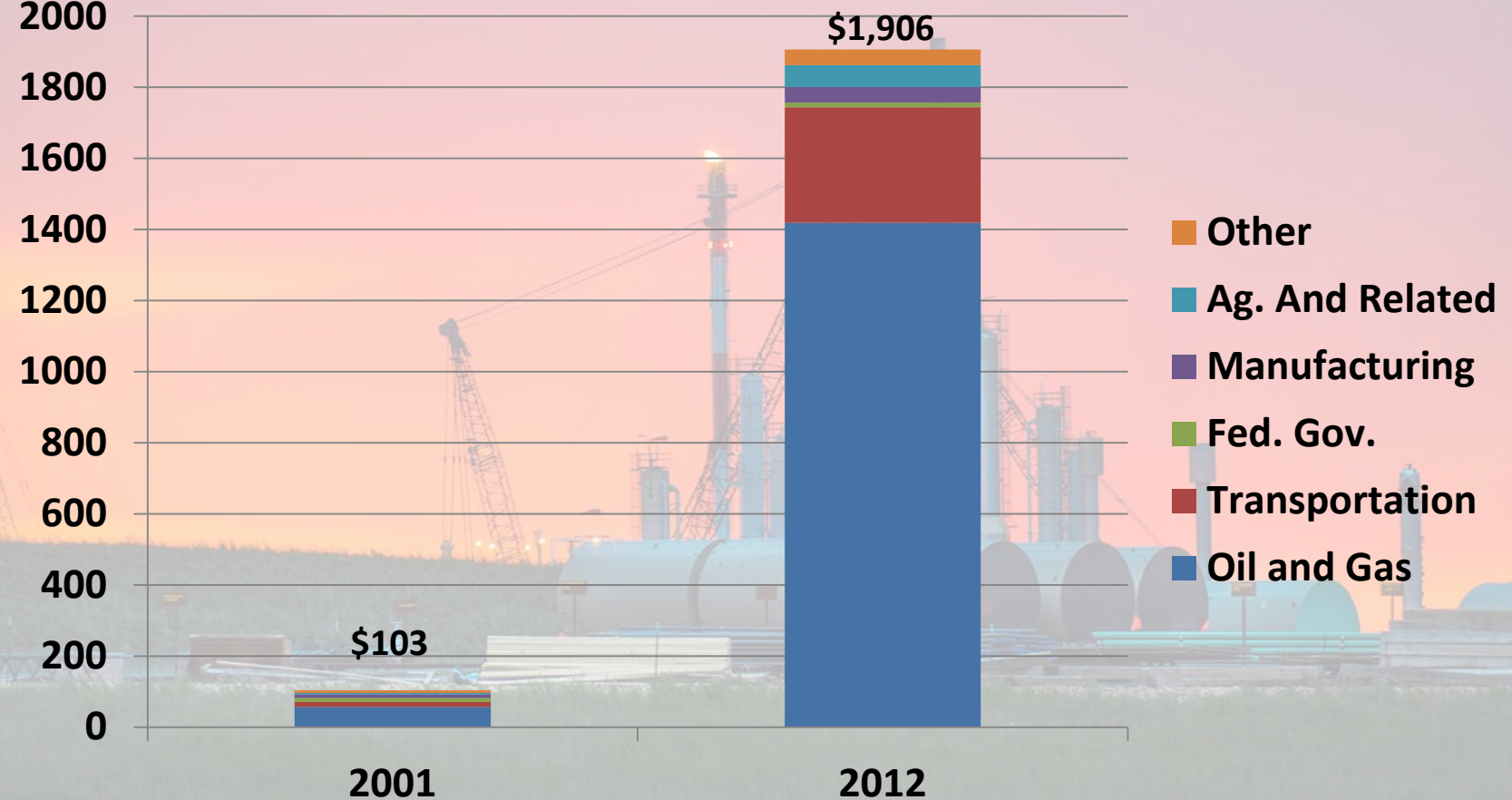
# Fallon County's Economic Base 2001-2012

Mil. Of 2012 \$



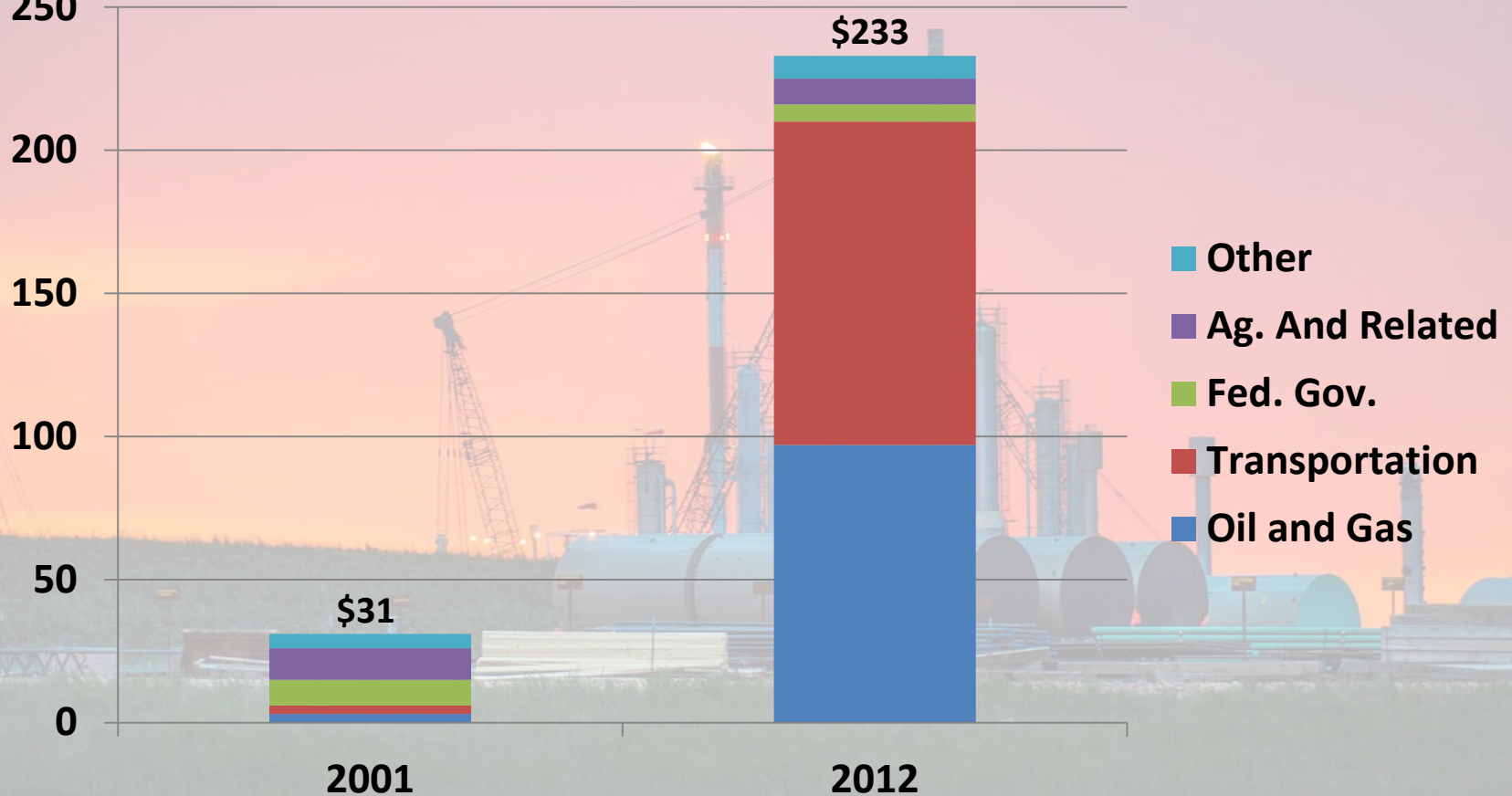
# Williams County's Economic Base 2001-2012

Mil. Of 2012 \$



# Mountrail County's Economic Base 2001-2012

Mil. Of 2012 \$  
250



# Wages and Salary Per Worker, All Industries

**Wages and Salary per Worker,  
Richland County (2012\$), All Industries**

	2012 Dollars	Percent of Mt
2003	30,024	91.1%
2004	30,359	92.3%
2005	31,827	95.0%
2006	34,854	101.8%
2007	37,402	106.3%
2008	39,675	112.4%
2009	38,268	106.9%
2010	40,424	112.0%
2011	45,097	123.7%
2012	49,492	133.4%

**Wages and Salary per Worker,  
Williams County (2012\$), All Industries**

	2012 Dollars	Percent of ND
2003	32,733	96.8%
2004	33,938	99.1%
2005	36,503	106.0%
2006	41,712	119.0%
2007	45,415	125.7%
2008	51,522	138.7%
2009	49,853	130.7%
2010	59,294	149.1%
2011	71,321	167.6%
2012	78,364	170.7%

# Wages and Salary per Worker, Retail Trade

**Wages and Salary per Worker,  
Richland County (2012\$), Retail Trade**

	2012 Dollars	Percent of Mt
2003	22,954	93.5%
2004	23,321	95.4%
2005	24,484	100.7%
2006	24,784	99.9%
2007	24,381	96.6%
2008	23,818	95.8%
2009	24,098	96.4%
2010	24,206	95.9%
2011	25,685	102.3%
2012	28,520	112.6%

**Wages and Salary per Worker,  
Williams County (2012\$), Retail Trade**

	2012 Dollars	Percent of ND
2003	22,639	96.0%
2004	22,795	97.4%
2005	22,681	97.7%
2006	23,667	102.3%
2007	26,171	110.5%
2008	28,322	116.9%
2009	28,115	114.2%
2010	32,001	127.0%
2011	37,291	142.7%
2012	39,212	142.7%

# Wages and Salary per Worker, Accommodations Industry

## Wages and Salary per Worker, Richland County (2012\$), Accommodations

	2012 Dollars	Percent of Mt
2003	8,570	51.8%
2004	8,745	53.4%
2005	8,627	51.6%
2006	8,242	48.4%
2007	9,634	54.5%
2008	9,816	54.5%
2009	11,340	62.9%
2010	11,868	65.4%
2011	13,298	71.0%
2012	16,992	89.8%

## Wages and Salary per Worker, Williams County (2012\$), Accommodations

	2012 Dollars	Percent of ND
2003	12,096	89.3%
2004	11,286	83.8%
2005	11,032	81.9%
2006	11,697	86.0%
2007	12,986	93.9%
2008	14,418	103.3%
2009	15,309	106.8%
2010	16,794	114.1%
2011	24,405	151.5%
2012	37,628	185.6%



# Wages and Salary per Worker, Food Services Industry

Wages and Salary per Worker, Richland County (2012\$), Food Service		
	2012 Dollars	Percent of Mt
2003	9,643	80.5%
2004	9,697	81.6%
2005	9,997	84.3%
2006	10,672	88.1%
2007	11,473	90.6%
2008	11,459	91.3%
2009	11,741	90.6%
2010	12,285	92.6%
2011	13,445	100.9%
2012	14,861	108.8%

Wages and Salary per Worker, Williams County (2012\$), Food Service		
	2012 Dollars	Percent of ND
2003	11,036	96.5%
2004	10,756	96.1%
2005	10,795	96.2%
2006	11,383	99.8%
2007	12,231	104.5%
2008	12,645	105.2%
2009	13,717	110.3%
2010	15,144	116.8%
2011	20,640	152.1%
2012	20,668	145.9%

# Oil and Gas Industry Components

<b>NAICS Code</b>	<b>Industry Title</b>
<b>211</b>	<b>Oil and Gas Extraction</b>
<b>213111</b>	<b>Drilling of Oil and Gas Wells</b>
<b>213112</b>	<b>Support Activity for Oil and Gas</b>
<b>237121</b>	<b>Oil and Gas Pipeline Construction</b>
<b>486</b>	<b>Pipeline Transportation</b>
<b>4842</b>	<b>Specialized Freight Trucking</b>

# Employment and Wages per Worker, Oil and Gas Industry, 2012

	Richland County		Montana	
	Employment	Wages	Employment	Wages
Extraction	122	102,400	788	80,159
Drilling	112	139,500	643	97,100
Support Activities	532	77,500	2,122	86,100
Pipeline Construction	129	69,300	836	59,200
Pipeline Transportation	72	85,000	466	79,400
Specialized Trucking	422	70,800	NA	NA

# Questions?

