



# Local Outlook: Lewis and Clark County

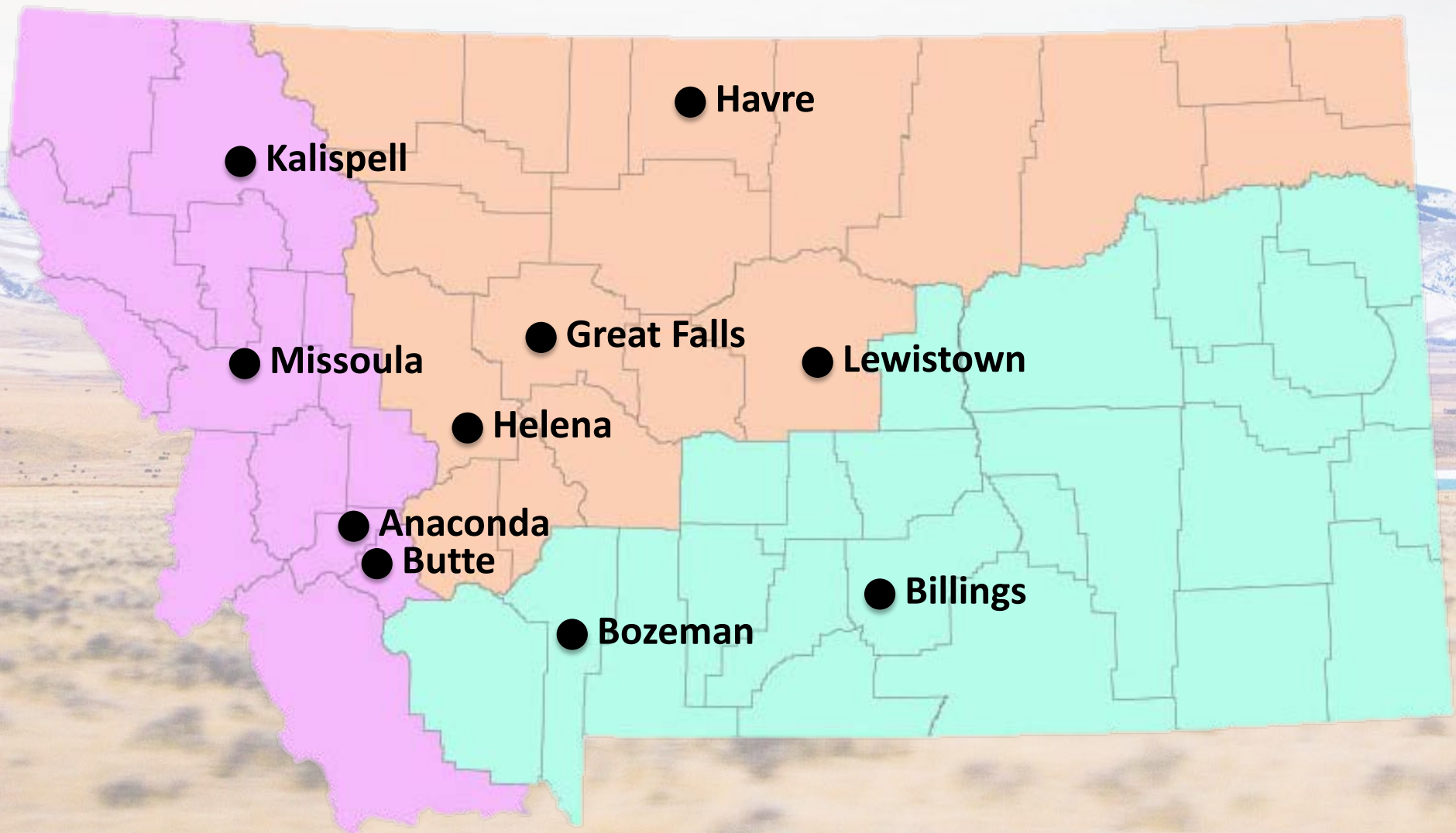
By Paul E. Polzin

Director Emeritus

Bureau of Business and Economic Research

The University of Montana

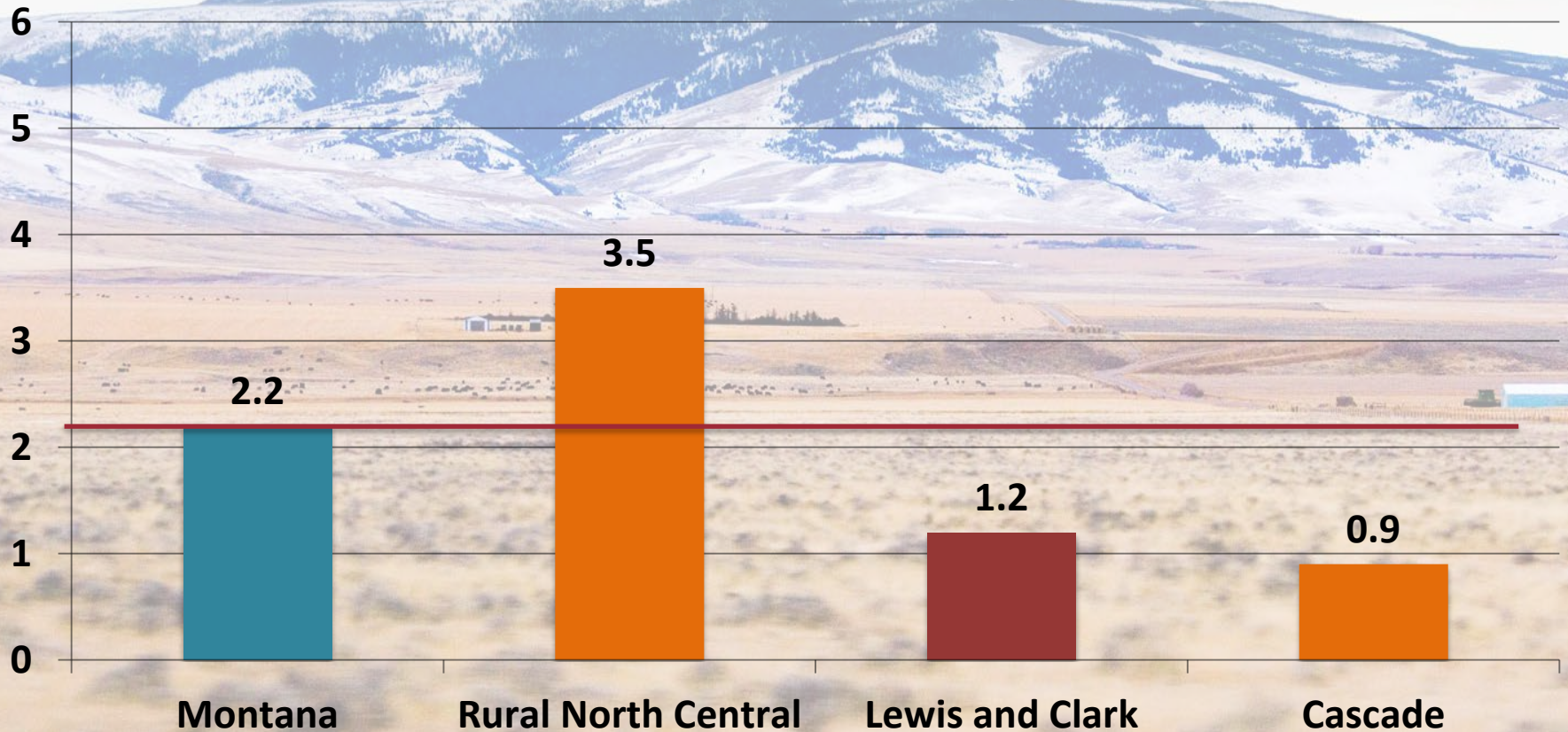
# Montana's Economic Regions





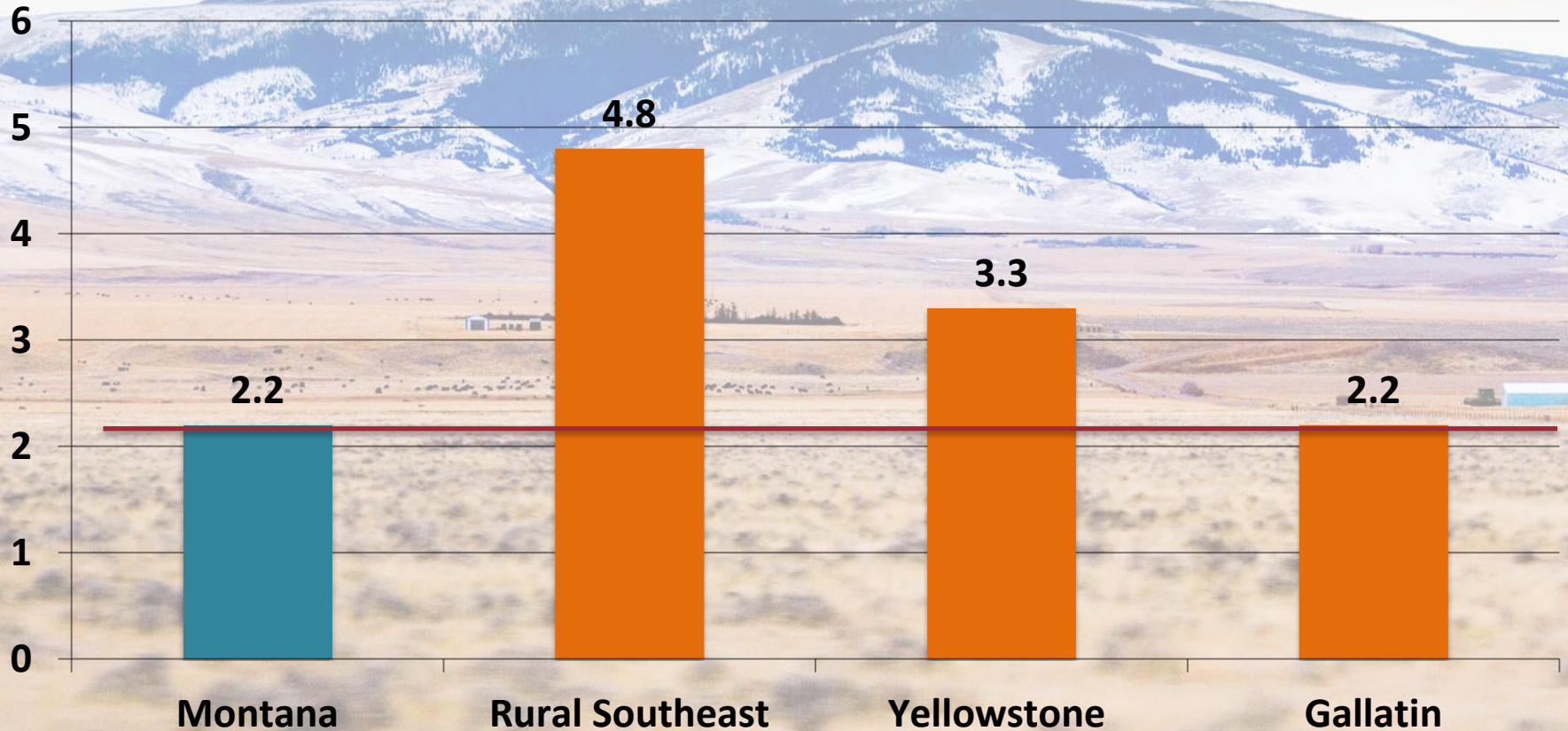
# Annual Percent Change in Nonfarm Labor Income (in Constant Dollars), 2009-2013

Percent



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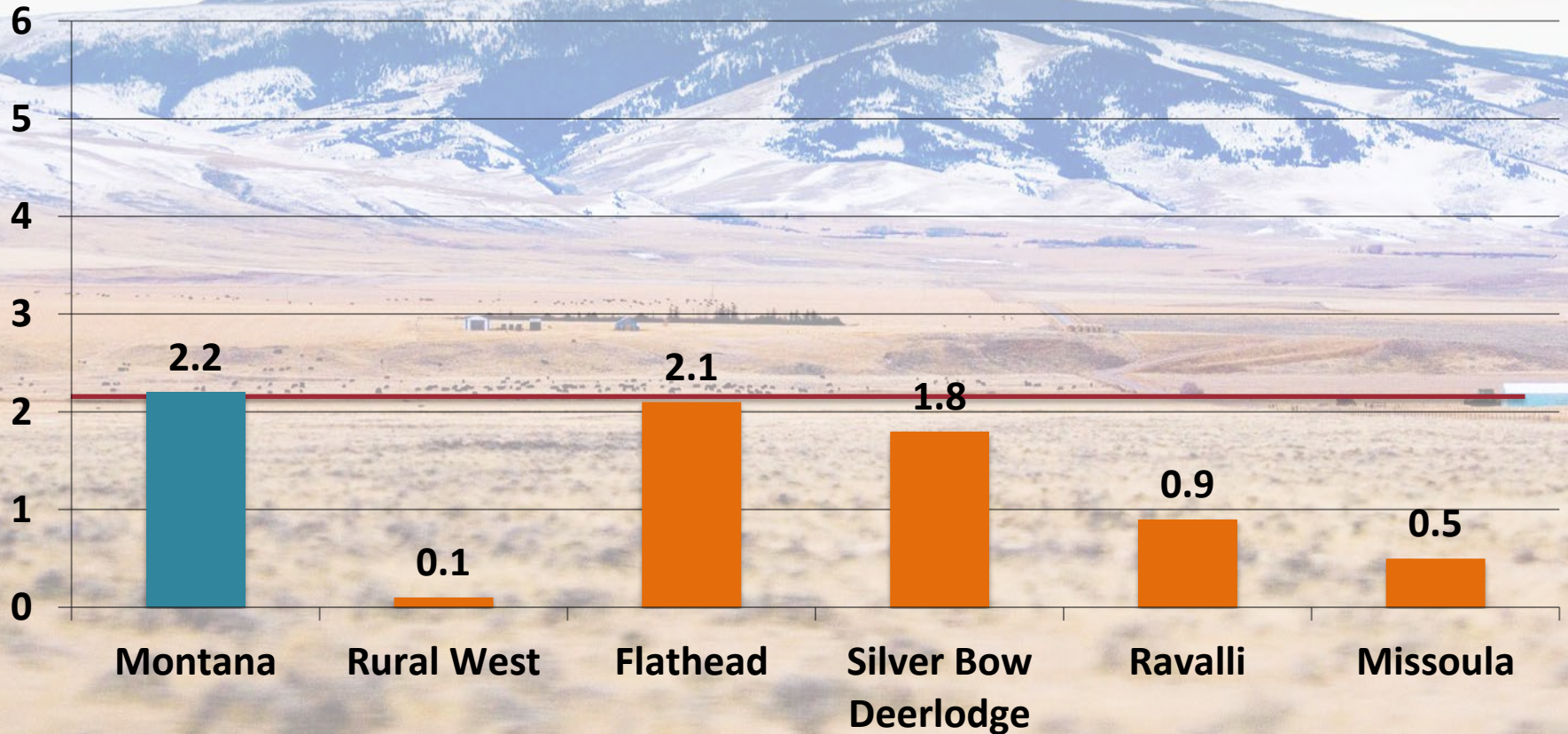
Percent





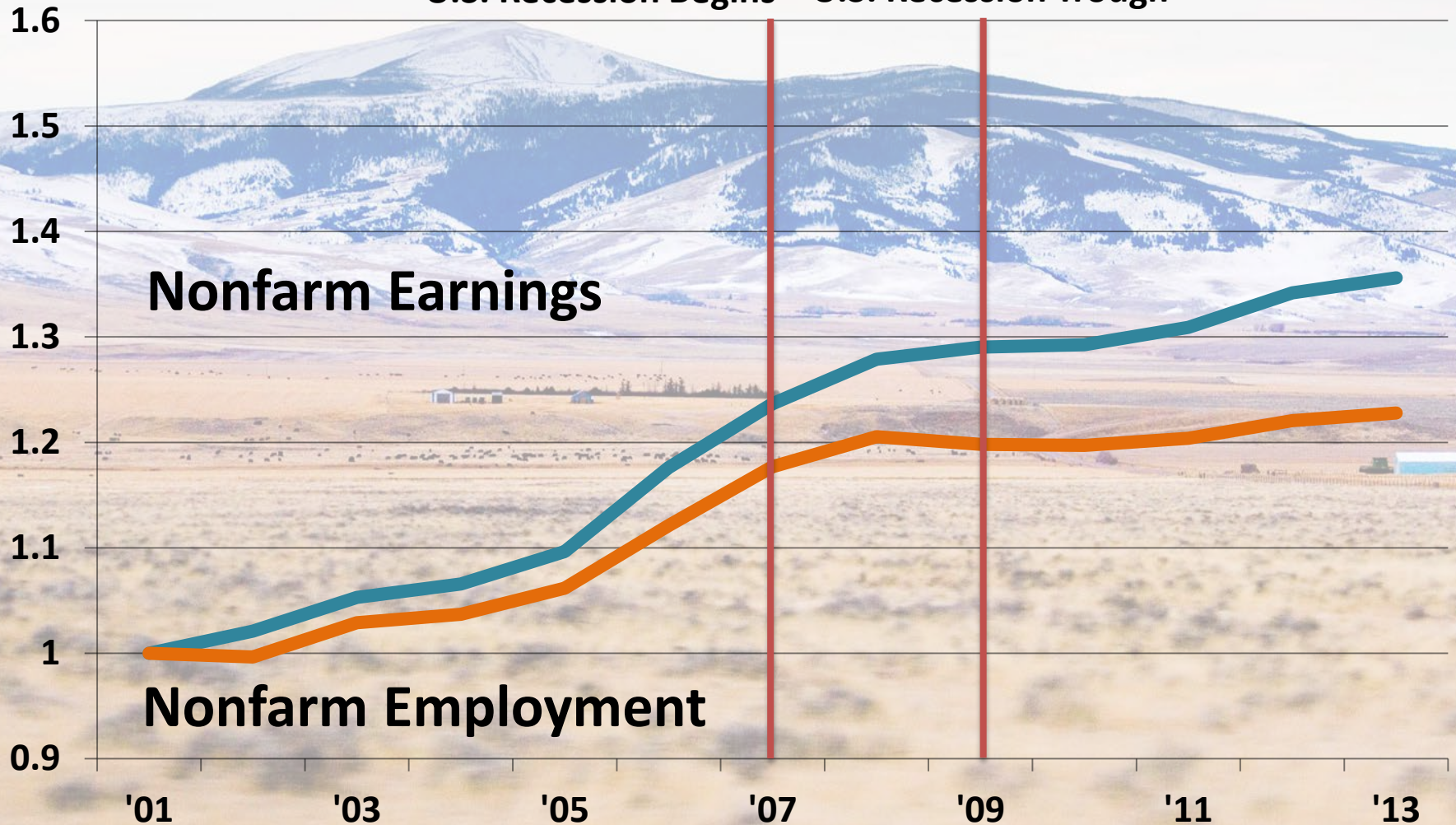
# Annual Percent Change in Nonfarm Labor Income (in Constant Dollars), 2009-2013

Percent



# Inflation Adjusted Nonfarm Earnings and Nonfarm Employment, Lewis & Clark County, 2001-2013

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



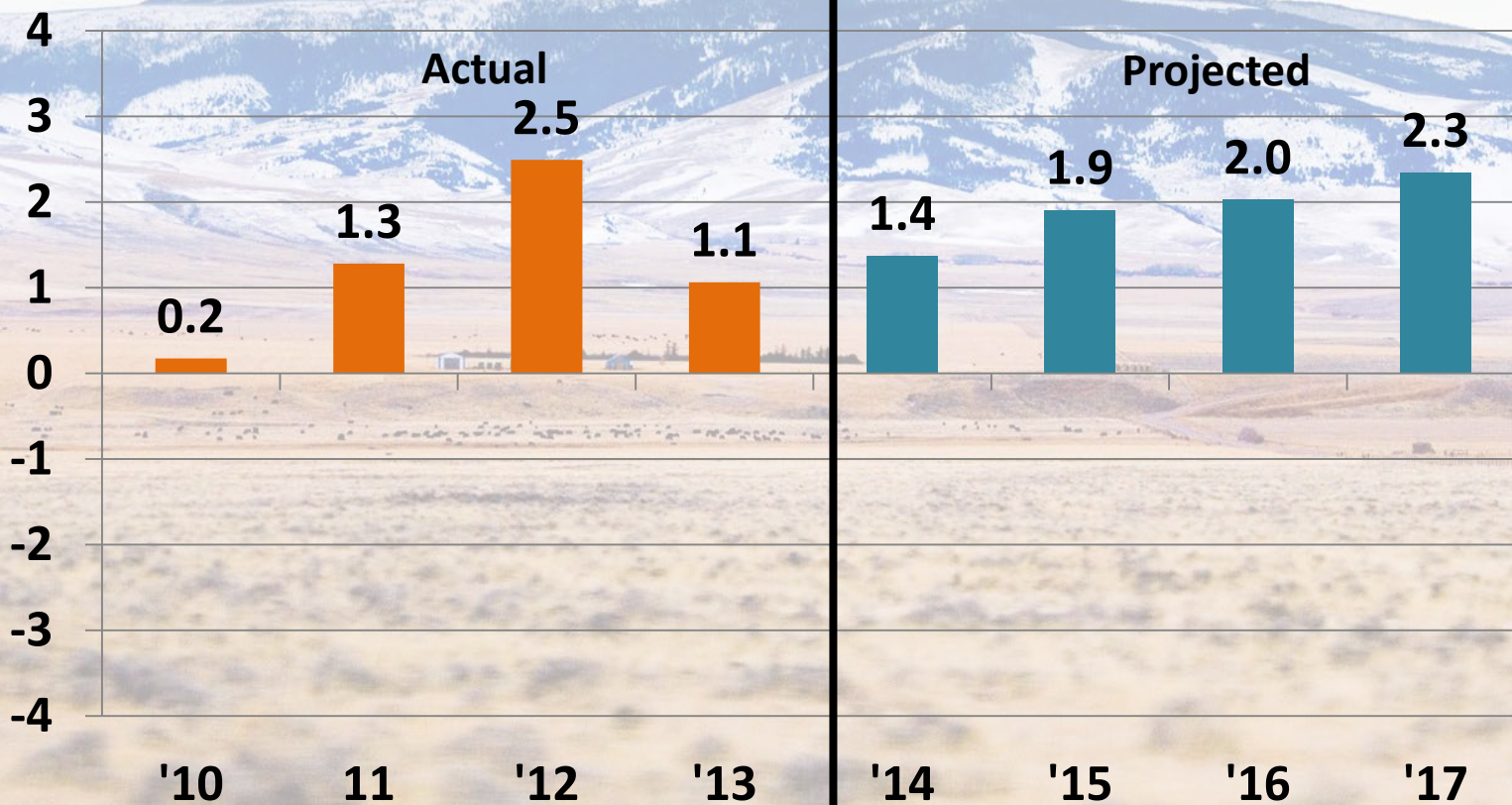


# Lewis & Clark County's Economic Base 2012-2014

<b>Ag. And Mining</b>	<b>2%</b>	<b>Ag., Promising</b>
<b>Transportation and Information</b>	<b>2%</b>	<b>Energy Growth</b>
<b>Selected Manufacturing</b>	<b>4%</b>	<b>Boeing Connection</b>
<b>Education, Other</b>	<b>7%</b>	<b>Stable</b>
<b>Trade Center-Insurance</b>	<b>7%</b>	<b>Ownership Change?</b>
<b>Trade Center-Prof. and Tech</b>	<b>7%</b>	
<b>Federal Government</b>	<b>25%</b>	<b>Stable at Best</b>
<b>State Government</b>	<b>46%</b>	<b>Pay Freeze Over</b>
<b>Construction</b>		<b>Residential Rebound?</b>

# Actual and Projected Change in Nonfarm Earnings, Lewis & Clark County, 2010-2017

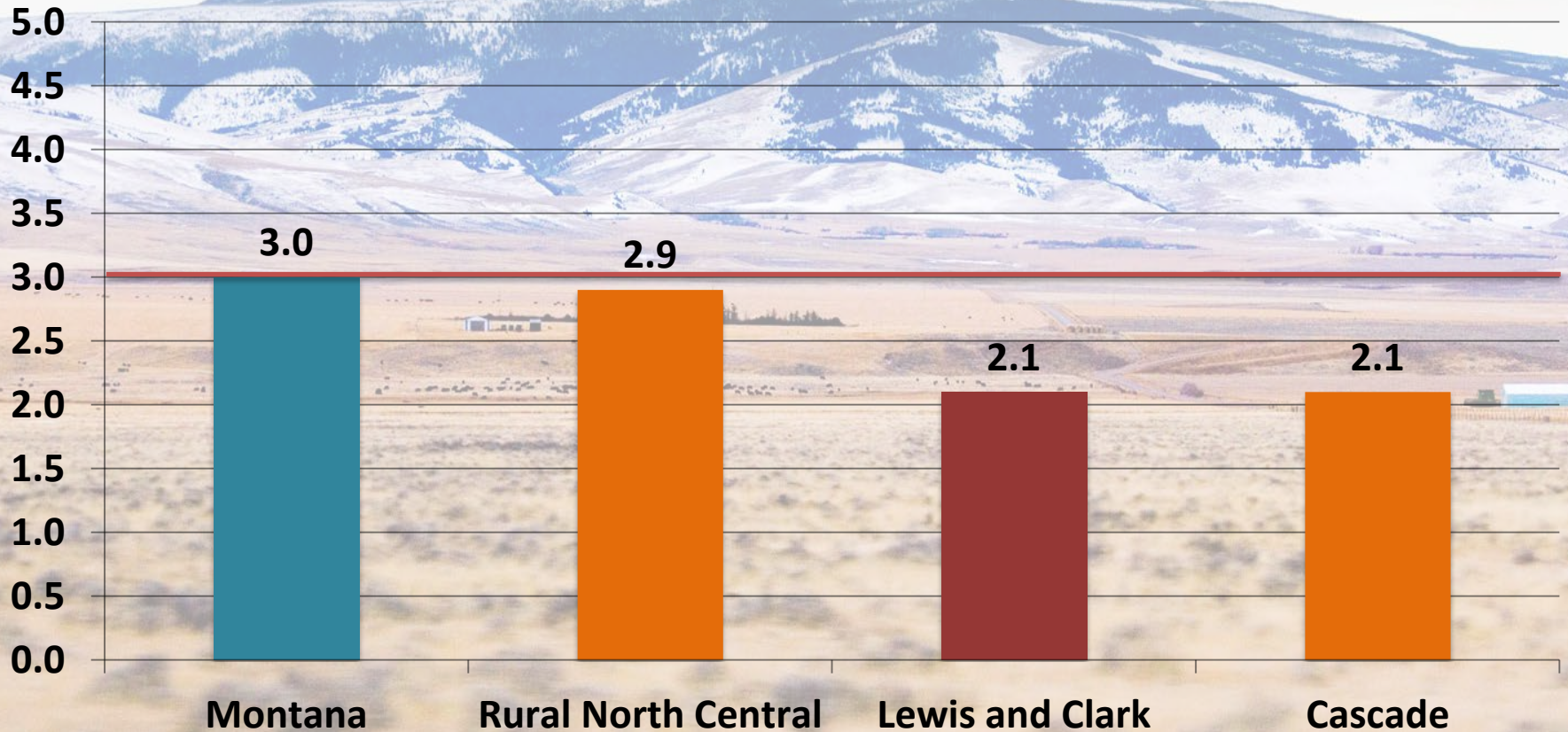
Percent





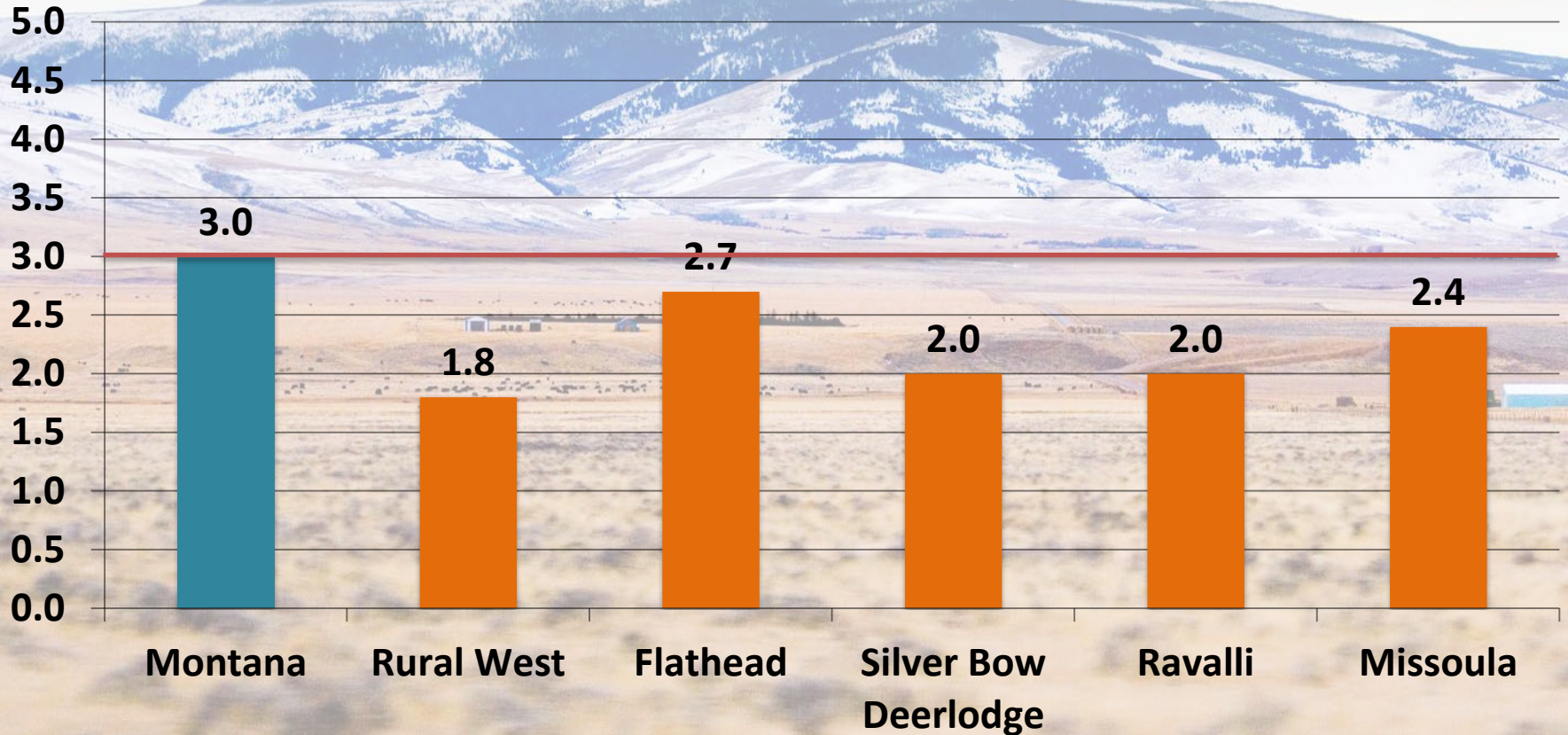
# Projected Annual Percent Change In Nonfarm Labor Income (in constant dollars), 2014-2017

Percent



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

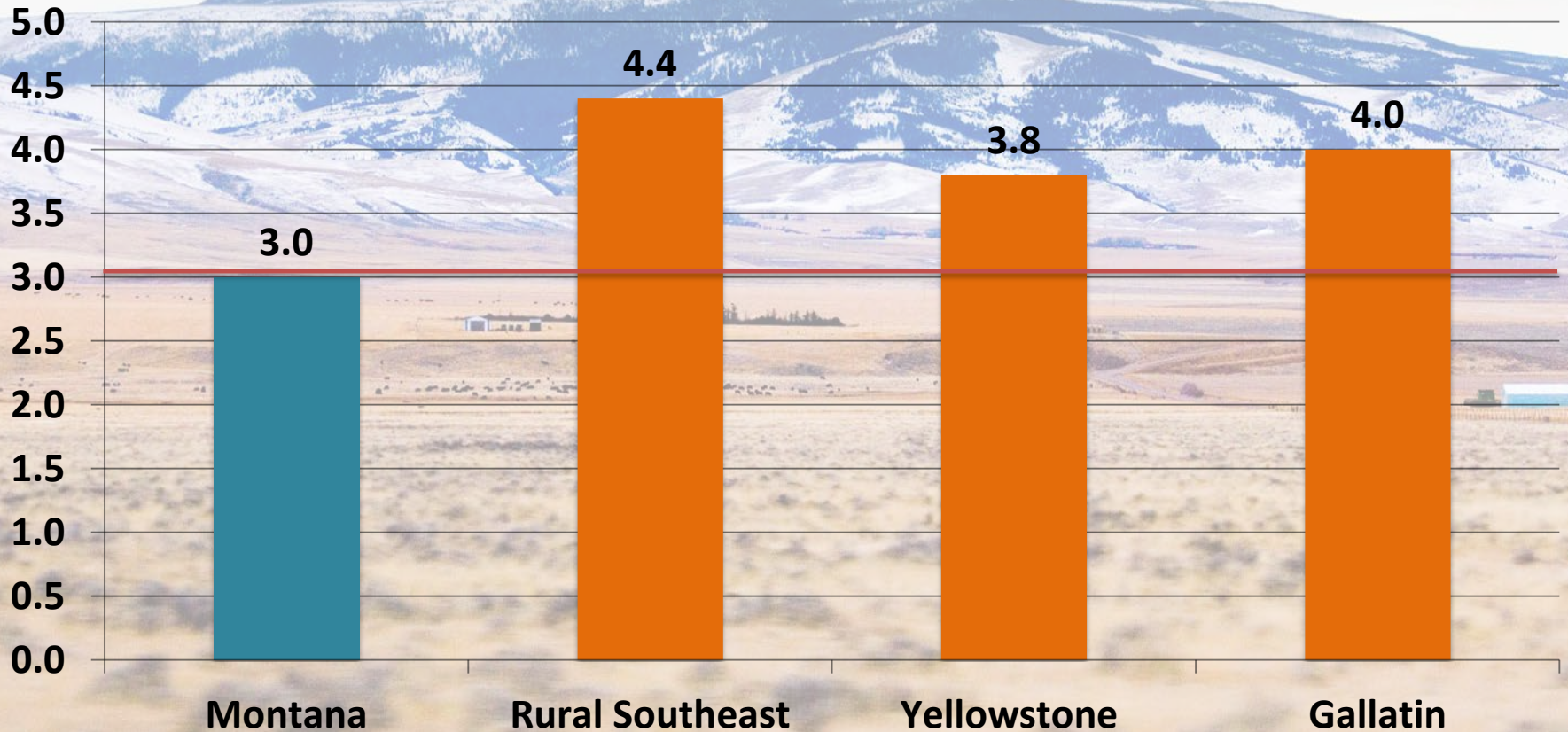
Percent





# 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  
The University of Montana

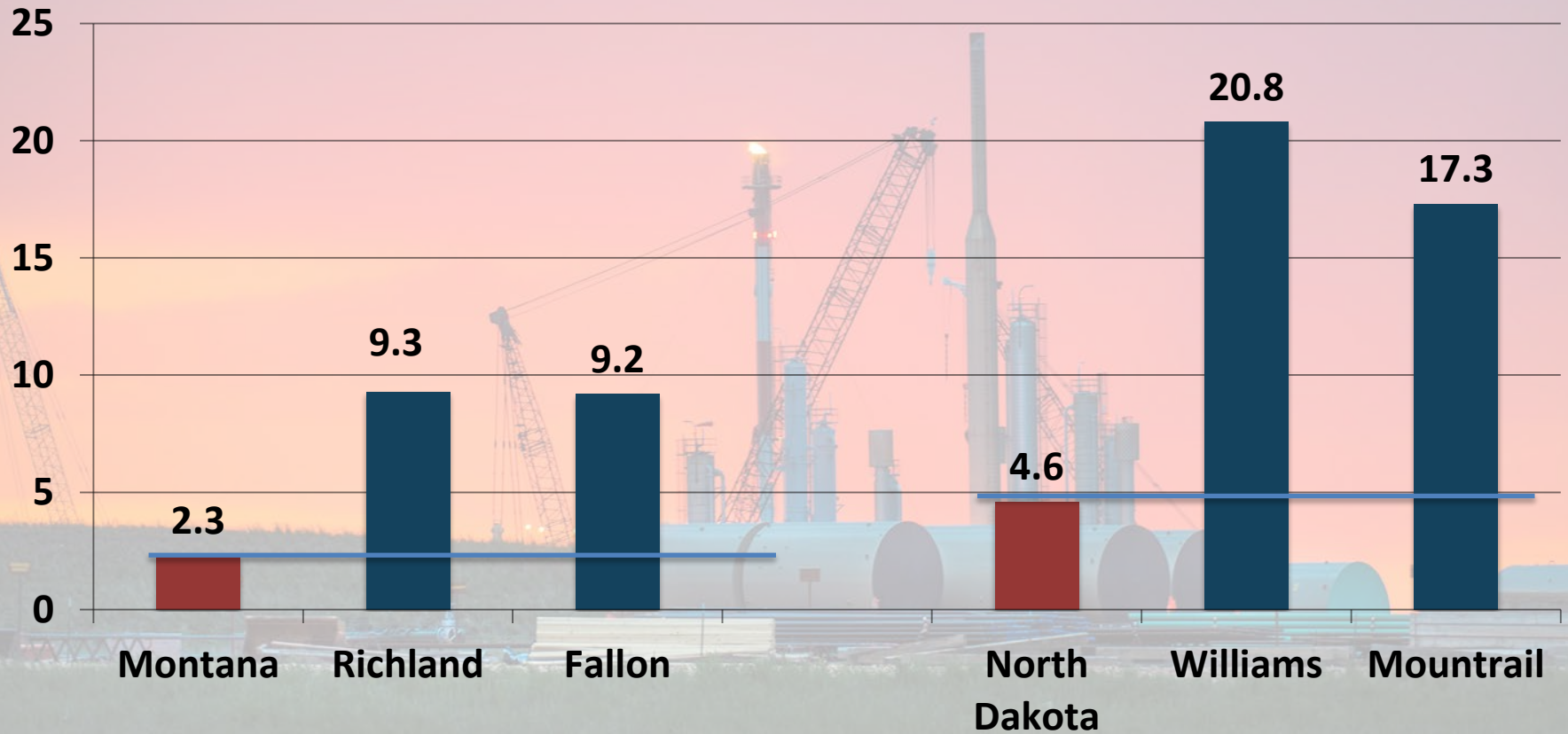






# Annual Percent Change in Nonfarm Earnings (in Constant Dollars), 2001-2012

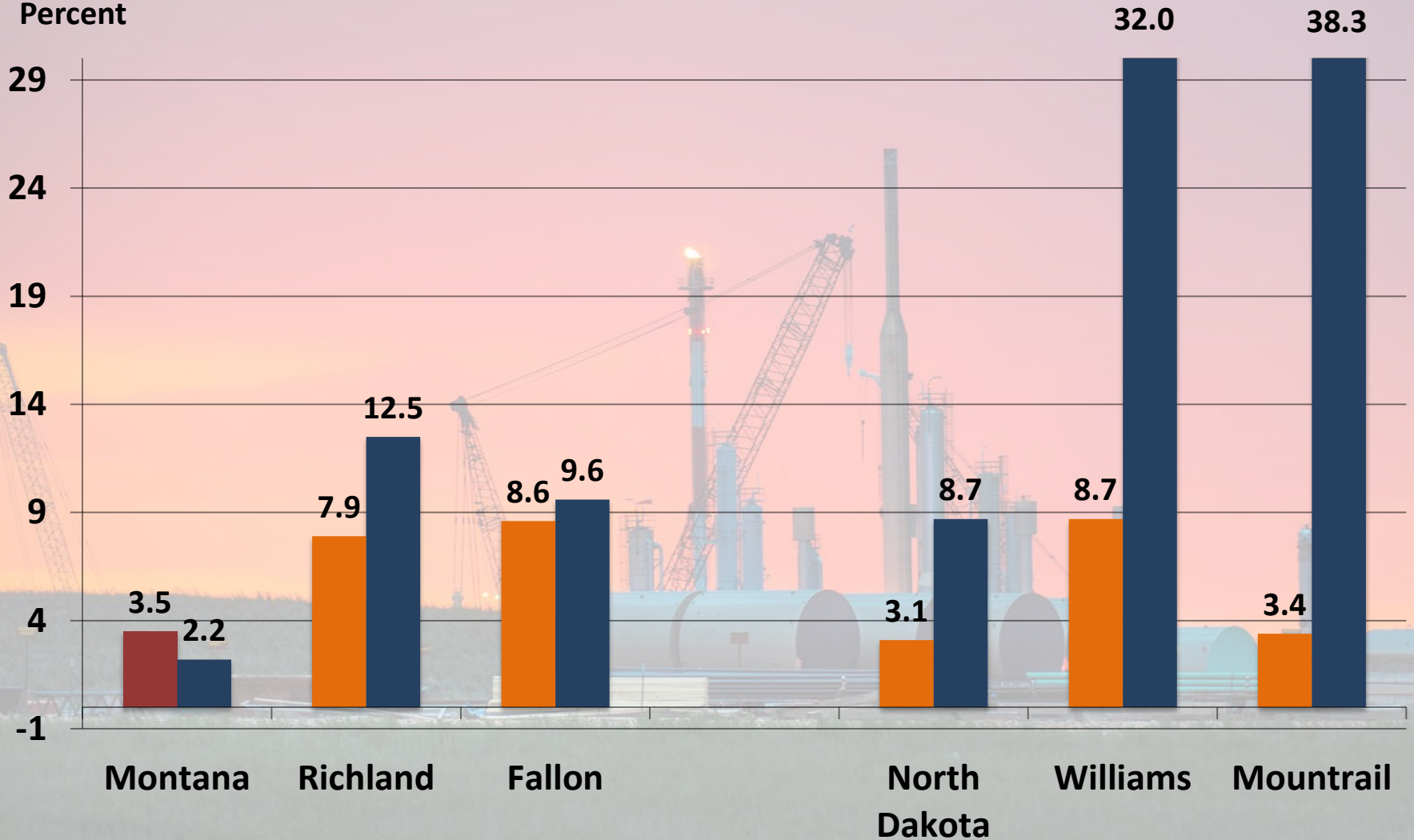
Percent



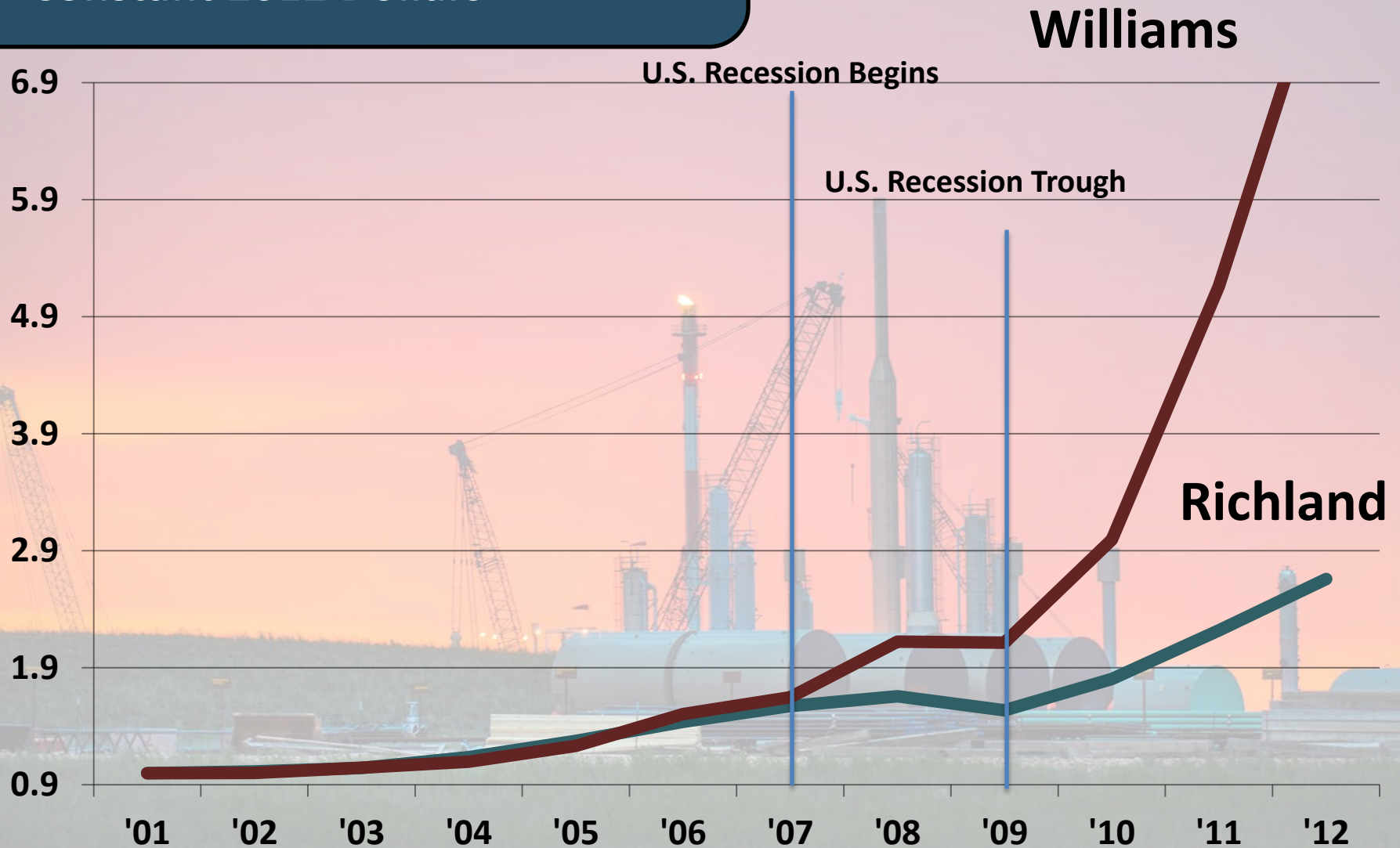


# Annual Percent Change in Nonfarm Earnings (in Constant Dollars), 2001-07 and 2008-12

Percent

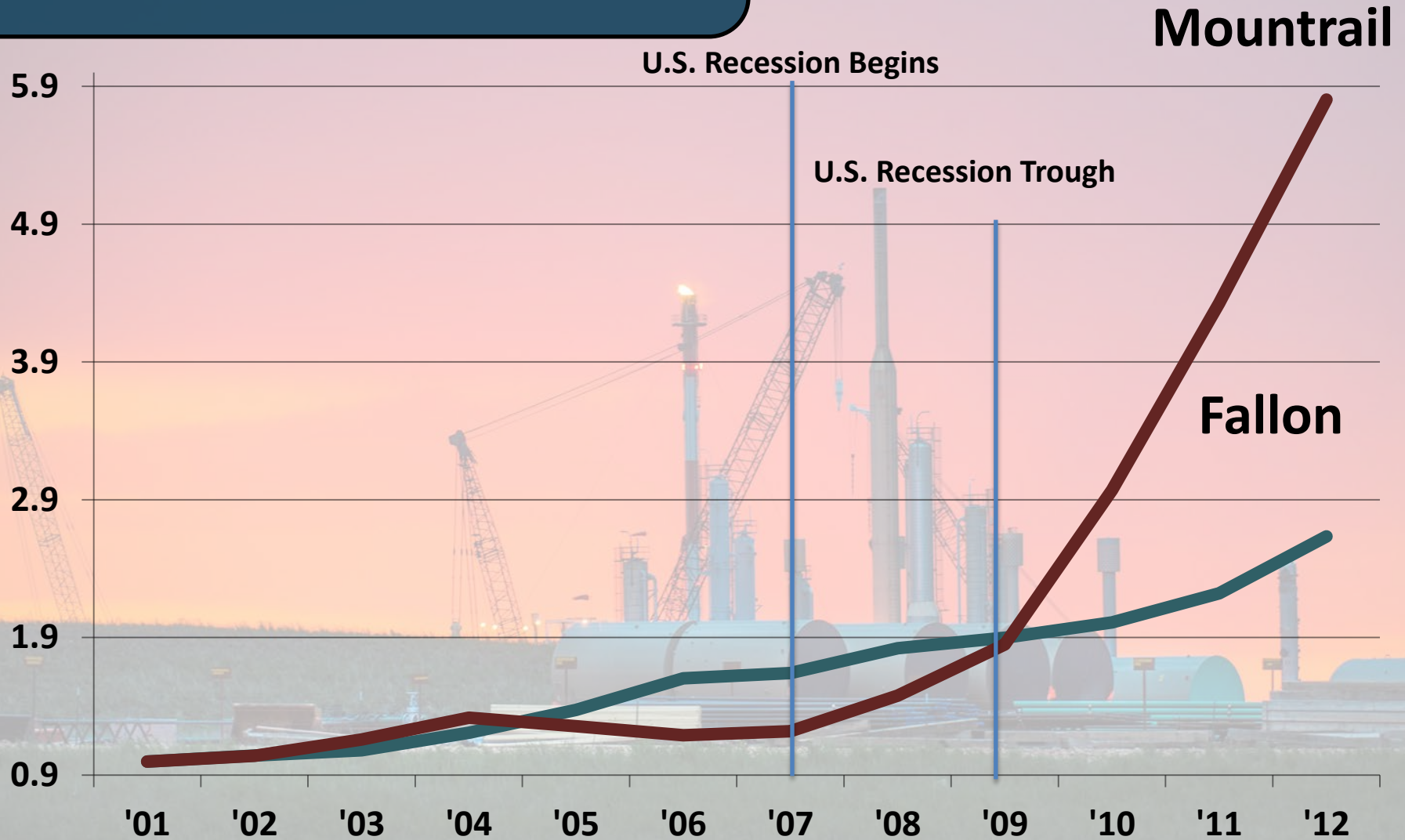


# Nonfarm Earnings, Richland and Williams Counties, Constant 2012 Dollars



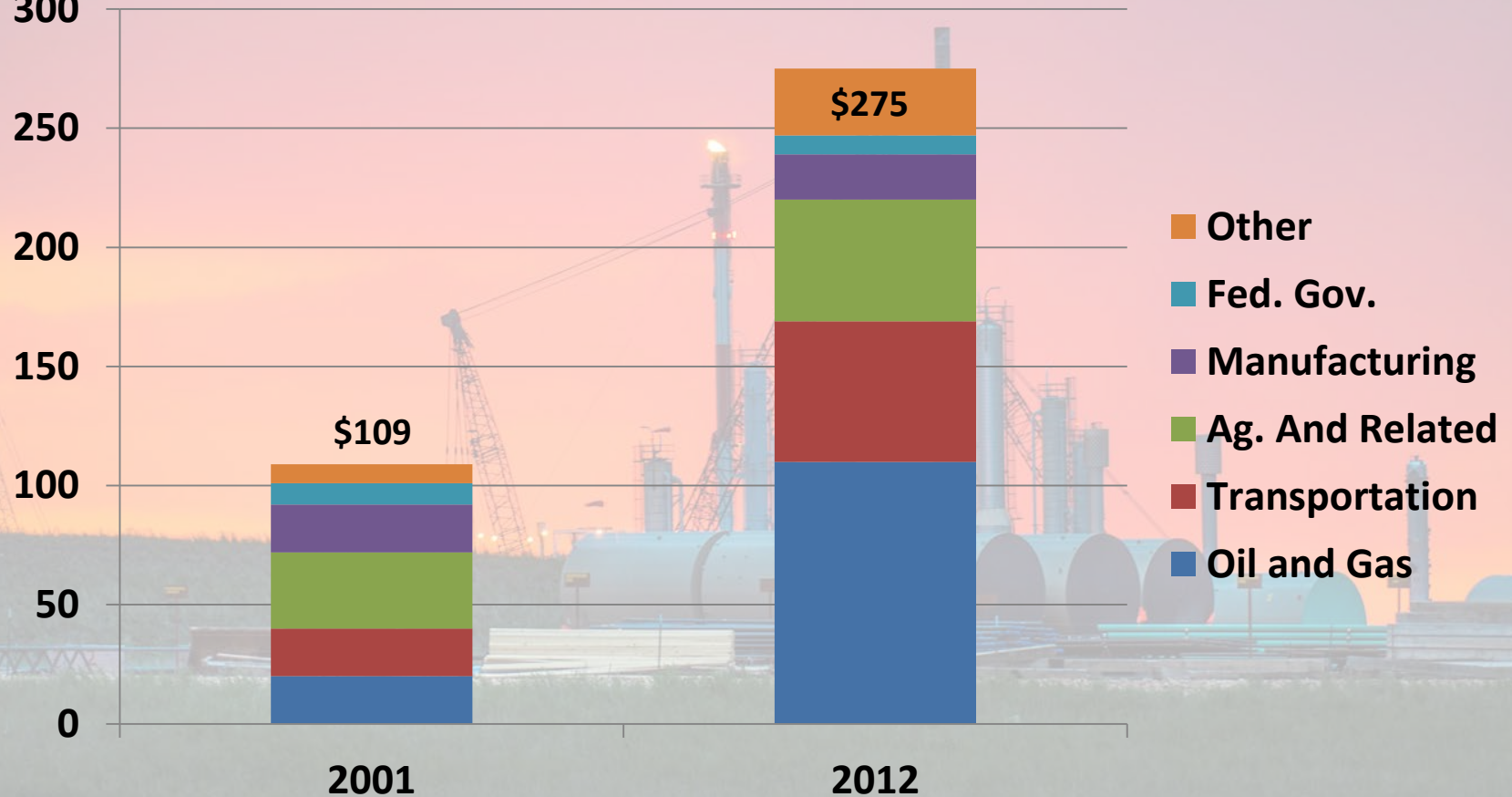


# Nonfarm Earnings, Fallon and Mountrail Counties, Constant 2012 Dollars



# Richland County's Economic Base 2001-2012

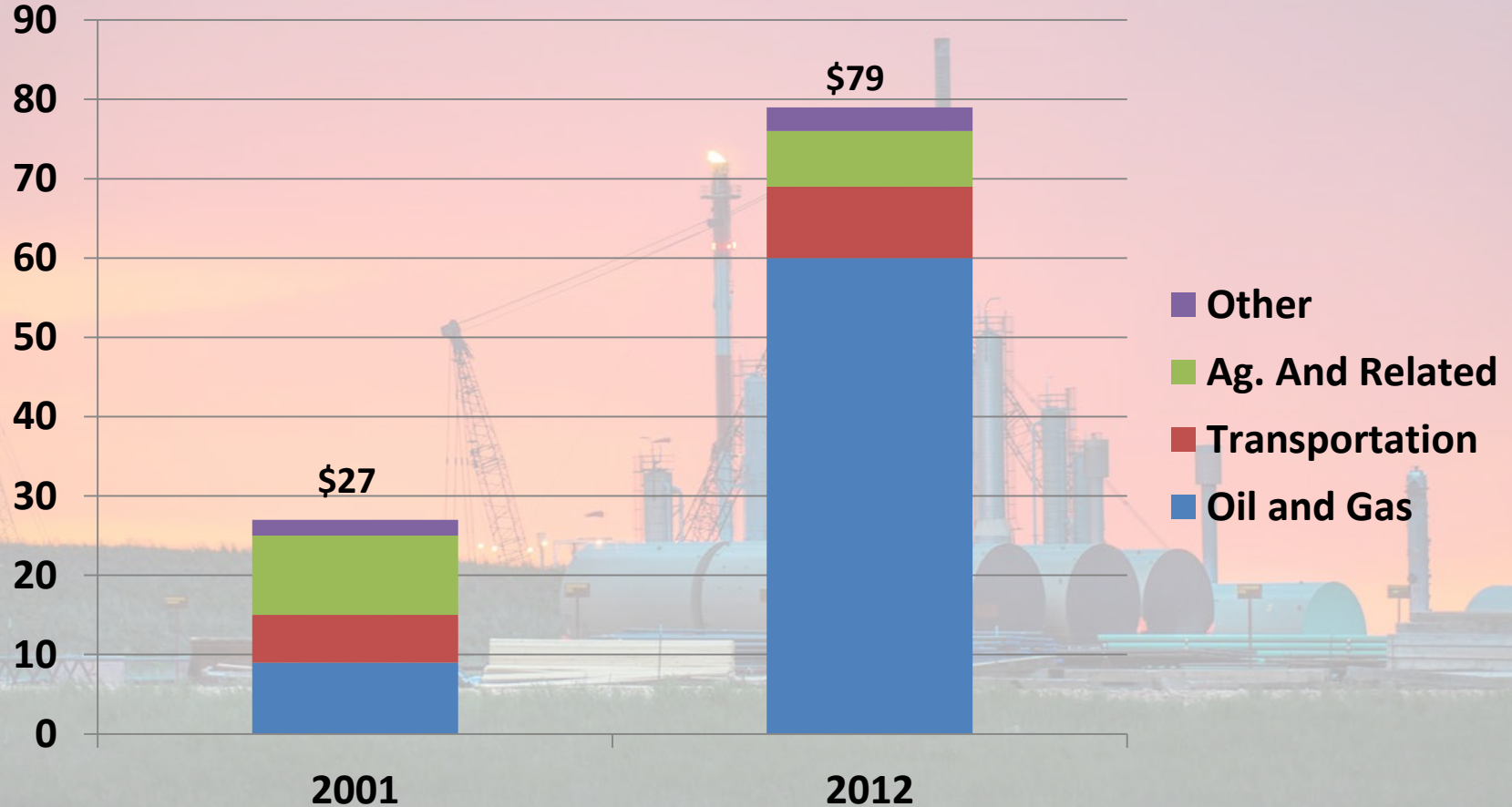
Mil. Of 2012 \$  
300





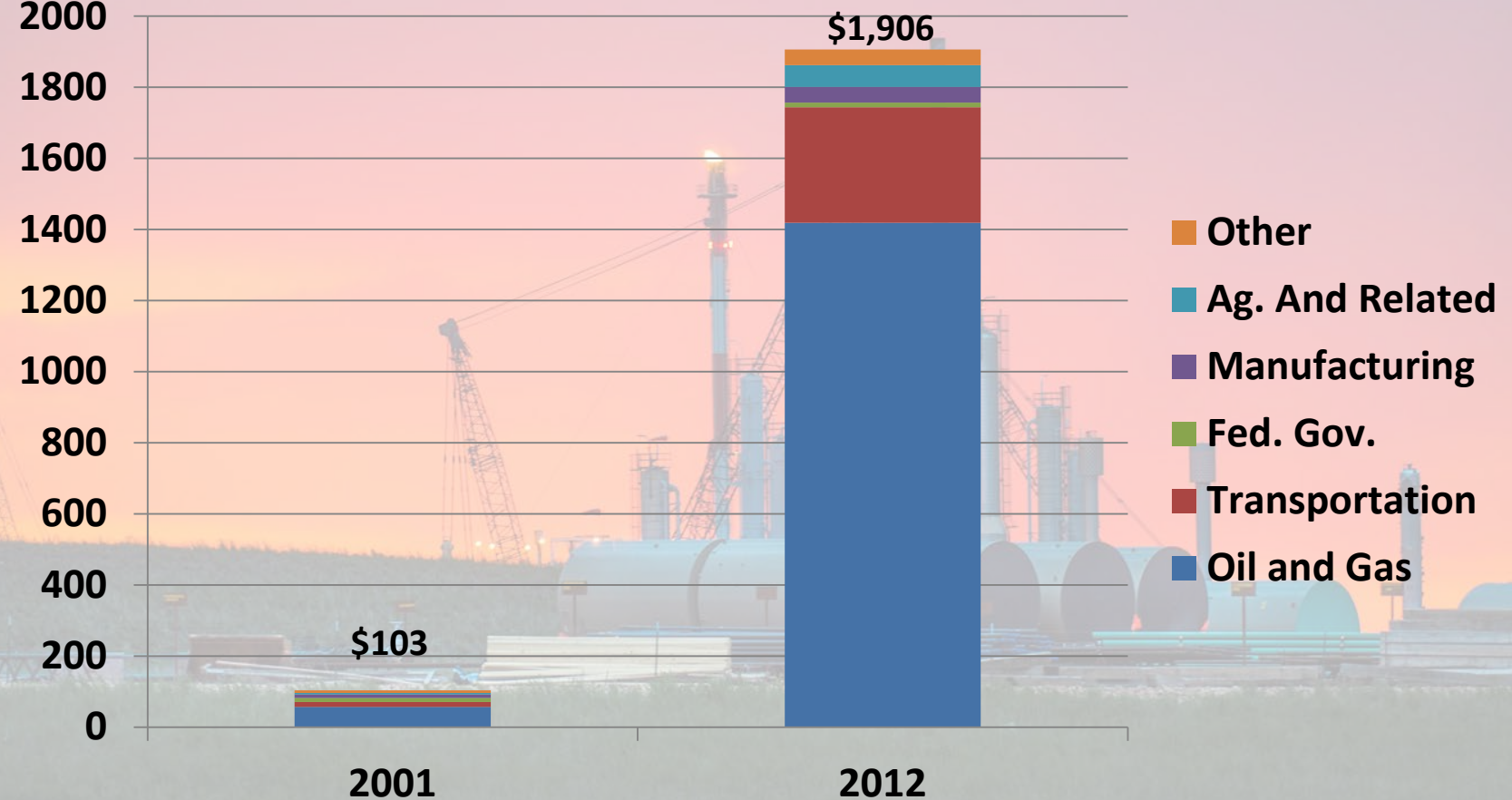
# Fallon County's Economic Base 2001-2012

Mil. Of 2012 \$



# Williams County's Economic Base 2001-2012

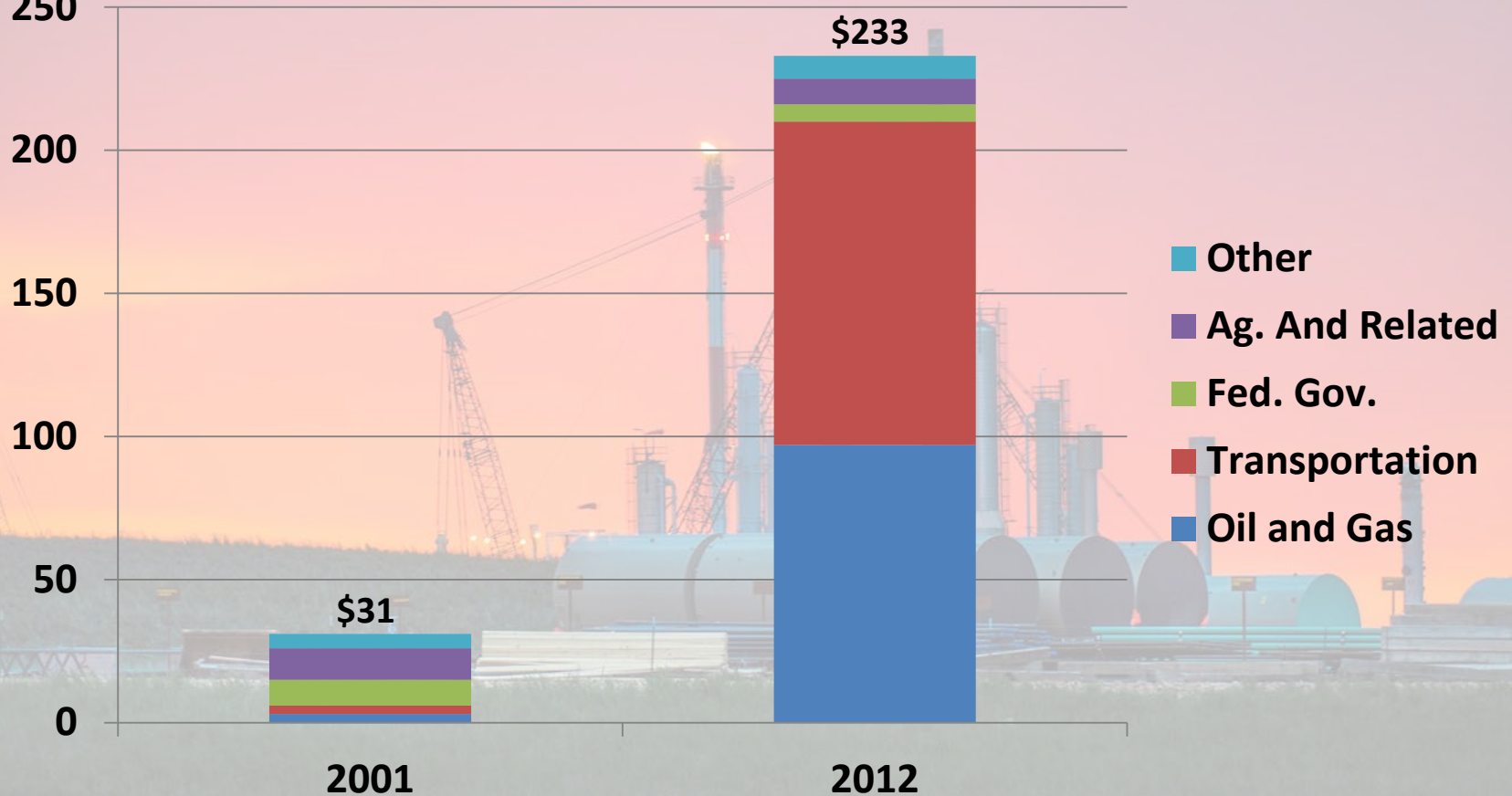
Mil. Of 2012 \$





# 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, 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?

