



Local Outlook: Flathead County

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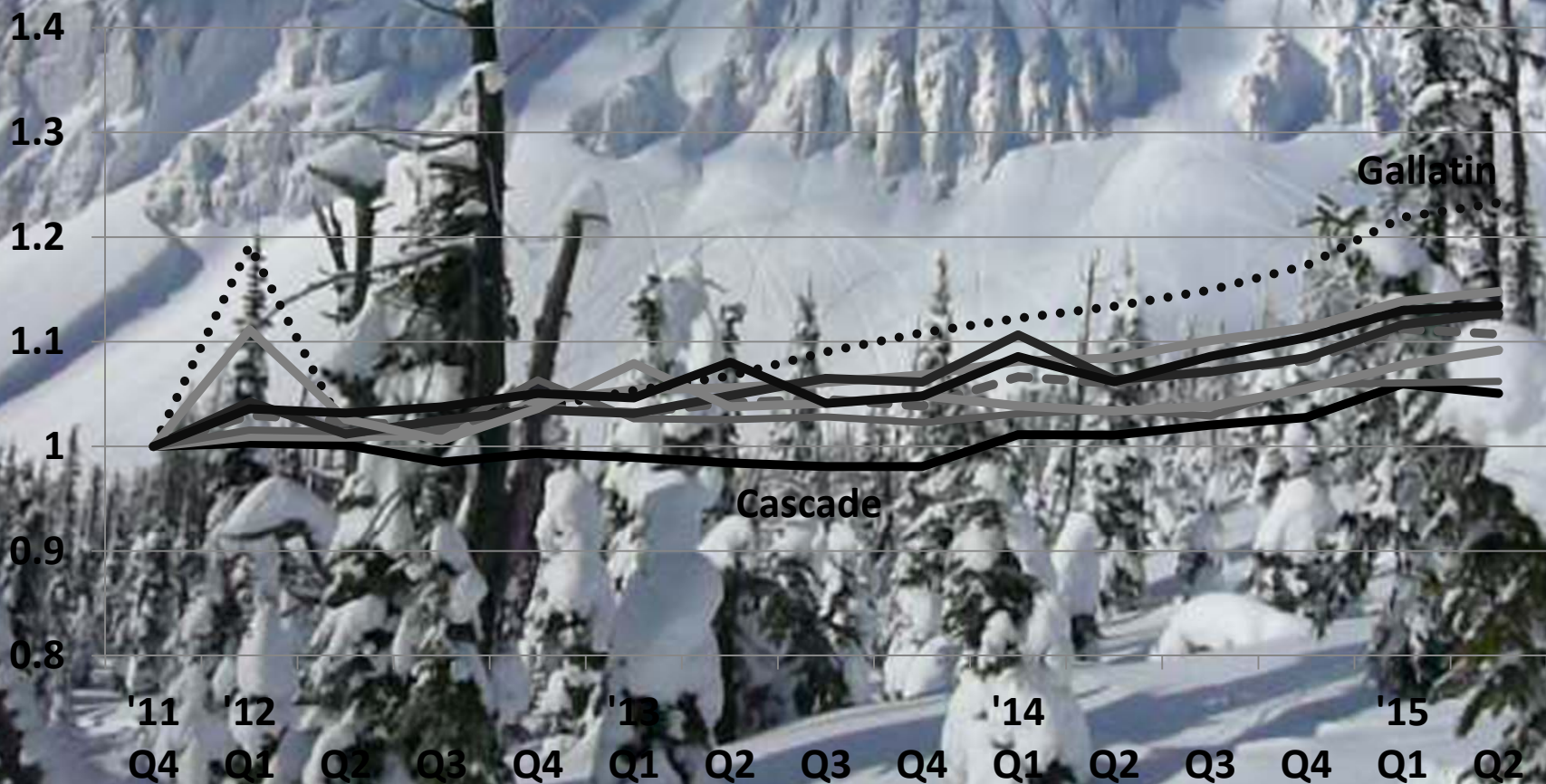
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Inflation Adjusted Wages and Salaries, 2011 Q1 to 2015 Q2

Index, 2011 Q4=1.00



Inflation Adjusted Wages and Salaries, 2011 Q1 to 2015 Q2

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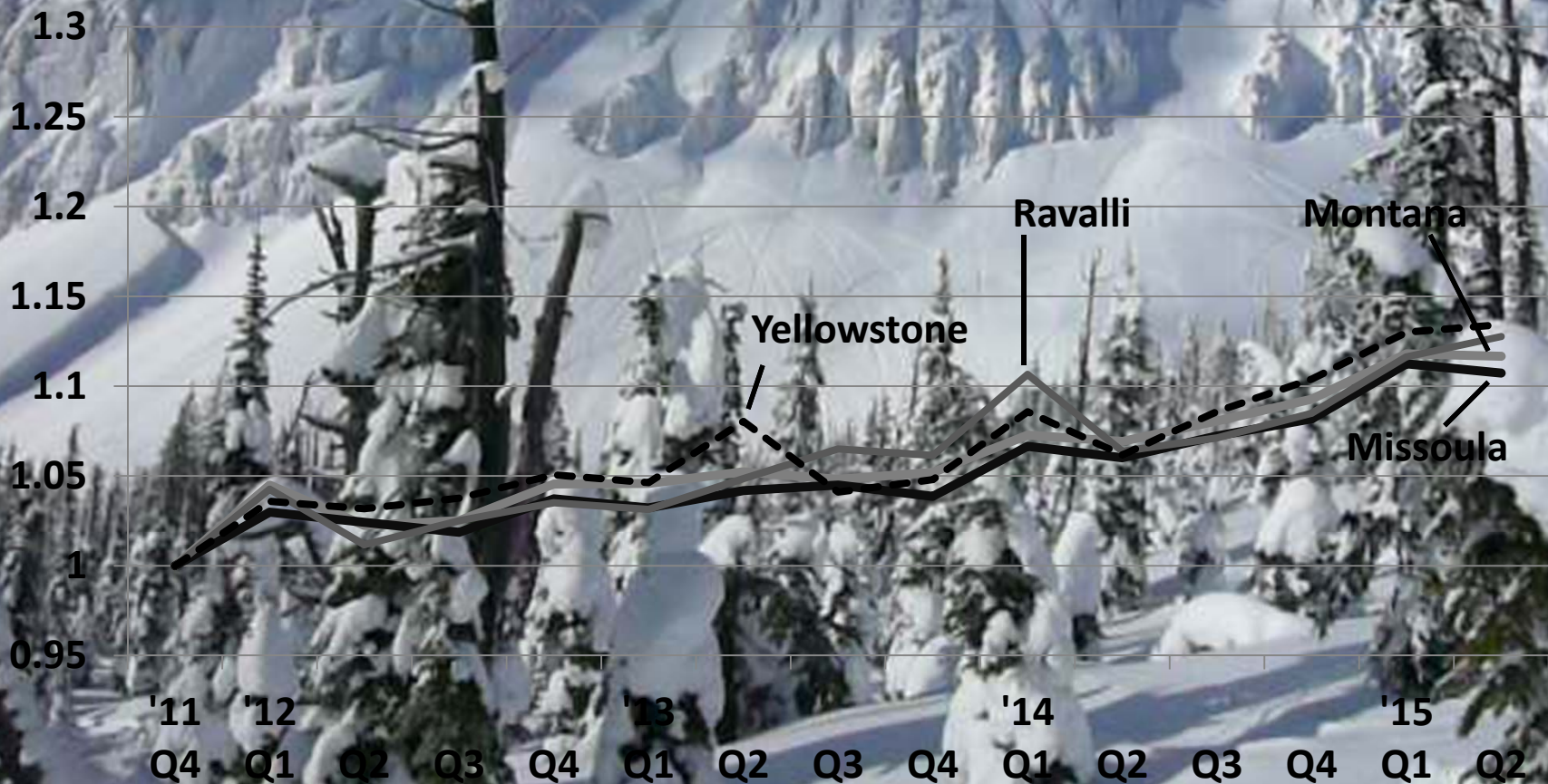
Inflation Adjusted Wages and Salaries, 2011 Q1 to 2015 Q2

Index, 2011 Q4=1.00



Inflation Adjusted Wages and Salaries, 2011 Q4 to 2015 Q2

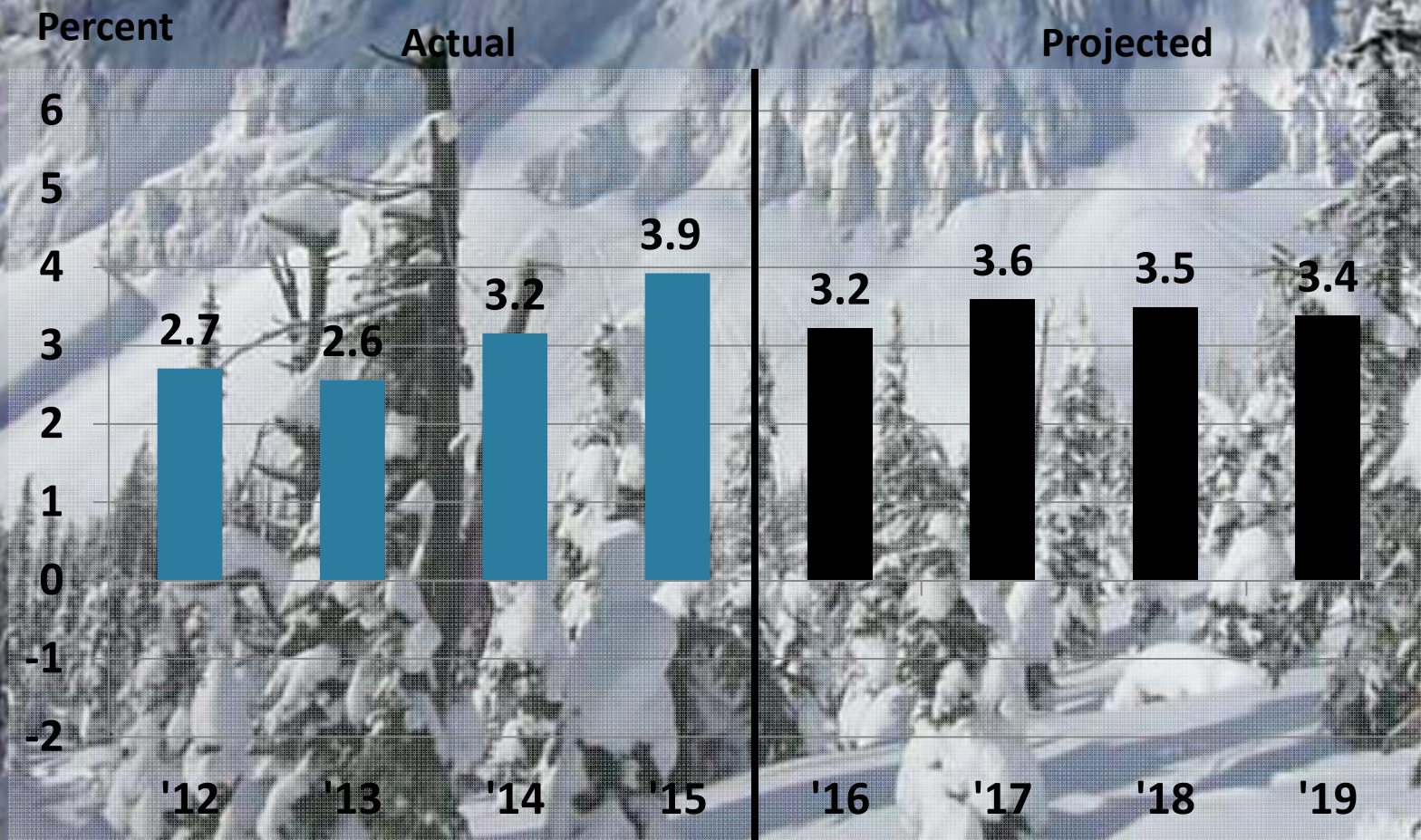
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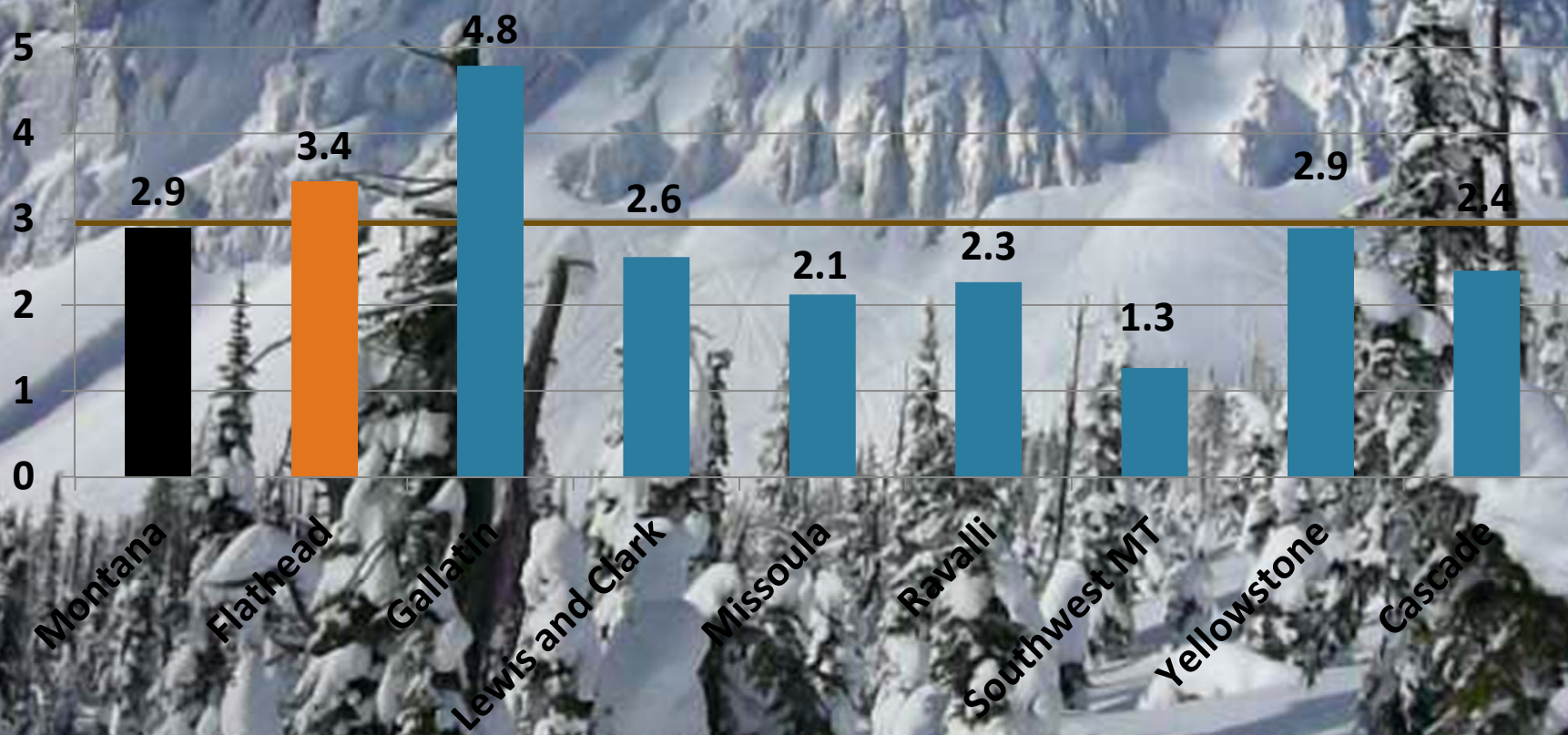
Flathead County's Economic Base 2014-2016

| | | |
|-----------------------|-----|-------------------------------|
| Trade Center-Retail | 3% | Still Growing |
| Ag. and Other | 5% | |
| Trade Center-Services | 14% | Moderate Growth |
| Transportation | 7% | Recent Softening |
| Health Care | 10% | Still Growing |
| Other Manufacturing | 15% | Stable. Worldwide Conditions? |
| Wood Products | 14% | Stable |
| Federal Government | 12% | Stable at Best |
| Nonresident Travel | 20% | Canadians? |
| Construction | | Second Best Recovery |

Actual and Projected Change in Nonfarm Earnings, Flathead County, 2012-2019



Projected Annual Percent Change in Nonfarm Labor Income (in Constant Dollars) 2016-2019





Federal Government Trends

Federal Government Employment Categories

Examples

NAICS 921

Executive, legislative and general government

Congressional Staff

NAICS 922

Justice, public order, and safety activities

FBI, Border Patrol

NAICS 923

Administration of human resource programs

**BIA? (Big in Glacier,
Big Horn, Roosevelt Counties)**

NAICS 924

Administration of environmental programs

US Forest Service, BLM

NAICS 926 Administration of economic programs

Urban Areas

NAICS 928

National security and international affairs

Civilian Employees at Malmstrom

NAICS 62 Health care and social assistance

VA, IHS clinics

NAICS 712

Museums, historical sites, zoos, and parks

US Park Service

NAICS 491 Postal service

Federal Government Employment Categories

| | 2011 | 2014 | Difference 2011-14 | |
|--|---------------|---------------|--------------------|--------------|
| | | | Number | Percent |
| Total | 13,846 | 12,968 | -878 | -6.3 |
| NAICS 921 | | | | |
| Executive, legislative and general government | 694 | 610 | -84 | -12.1 |
| NAICS 922 | | | | |
| Justice, public order, and safety activities | 986 | 863 | -123 | -12.5 |
| NAICS 923 | | | | |
| Administration of human resource programs | 859 | 834 | -25 | -2.9 |
| NAICS 924 | | | | |
| Administration of environmental programs | 4,506 | 4,033 | -473 | -10.5 |
| NAICS 926 Administration of economic programs | 851 | 760 | -91 | -10.7 |
| NAICS 928 | | | | |
| National security and international affairs | 1,383 | 1,291 | -92 | -6.7 |
| NAICS 62 Health care and social assistance | 1,497 | 1,734 | 237 | 15.8 |
| NAICS 712 | | | | |
| Museums, historical sites, zoos, and parks | 375 | 335 | -40 | -10.7 |
| NAICS 491 Postal service | 2,191 | 2,041 | -150 | -6.8 |
| All Other | 504 | 467 | -37 | -7.3 |



Questions?