What’s Driving Growth?

SERVICES VS. NON-SERVICES EMPLOYMENT GROWTH, WEST, 1970 TO 2010

Same Pattern for Non-Metro West

SERVICES VS. NON-SERVICES EMPLOYMENT GROWTH, NON-METRO WEST, 1970 TO 2010

Westwide: Industry Details

CHANGE IN EMPLOYMENT BY INDUSTRY, WEST, 2001 TO 2010

- Health care and social assistance: 786,810
- Real estate and rental and leasing: 500,815
- Finance and insurance: 391,851
- Government and government enterprises: 372,456
- Professional and technical services: 359,646
- Educational services: 241,049
- Accommodation and food services: 234,298
- Arts, entertainment, and recreation: 143,751
- Other services, except public administration: 141,910
- Administrative and waste services: 105,925
- Mining (incl. oil & gas): 76,135
- Transportation and warehousing: 20,234
- Forestry, fishing, related activities, and other*: 16,726
- Utilities: 7,428
- Wholesale trade: -2,107
- Wood products manufacturing*: -7,890
- Retail Trade: -14,161
- Management of companies and enterprises: -45,889
- Farm employment: -51,825
- Information: -184,679
- Construction: -367,436
- Manufacturing*: -766,738

## Non-Metro West Industry Details

### Change in Employment by Industry, Non-Metro West, 2001 to 2010

<table>
<thead>
<tr>
<th>Industry</th>
<th>Change in Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health care and social assistance</td>
<td>-40,000</td>
</tr>
<tr>
<td>Real estate and rental and leasing</td>
<td>46,068</td>
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<tr>
<td>Finance and insurance</td>
<td>45,872</td>
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<tr>
<td>Government and government enterprises</td>
<td>42,291</td>
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<tr>
<td>Professional and technical services</td>
<td>26,184</td>
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<tr>
<td>Mining (incl. oil &amp; gas)</td>
<td>23,223</td>
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<tr>
<td>Administrative and waste services</td>
<td>16,029</td>
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<tr>
<td>Educational services</td>
<td>15,110</td>
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<tr>
<td>Other services, except public administration</td>
<td>13,899</td>
</tr>
<tr>
<td>Arts, entertainment, and recreation</td>
<td>12,462</td>
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<tr>
<td>Accommodation and food services</td>
<td>5,682</td>
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<tr>
<td>Transportation and warehousing</td>
<td>2,297</td>
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<tr>
<td>Management of companies and enterprises</td>
<td>2,067</td>
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<tr>
<td>Forestry, fishing, related activities, and other*</td>
<td>656</td>
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<tr>
<td>Wholesale trade</td>
<td>202</td>
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<tr>
<td>Wood products manufacturing*</td>
<td>-3,255</td>
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<tr>
<td>Farm employment</td>
<td>-3,937</td>
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<tr>
<td>Retail Trade</td>
<td>-9,376</td>
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<tr>
<td>Information</td>
<td>-13,450</td>
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<tr>
<td>Construction</td>
<td>-26,024</td>
</tr>
<tr>
<td>Manufacturing*</td>
<td>-33,290</td>
</tr>
</tbody>
</table>

Jobs in 2011

The West

Source: BEA

- Agriculture
- Timber
- Mining
- All Other
1.4% of Personal Income in the West is from People Working in Resource Extraction

- Non-Labor: 33.9%
- Extractive: 13.2%
- Other Non-Services: 11.5%
- Services: 47.1%
- Government: 1.4%

Extractive = mining, oil, gas wood products
Non-labor = investment and retirement income

U.S. Department of Commerce. 2012. Bureau of Economic Analysis, Regional Economic Information System, Washington, D.C. Table SA05N.
Greater Yellowstone

What industries contribute the most jobs?

- Services
- Government
- Non-Services
- Not Disclosed

What industries are adding or losing jobs?

- Real Estate; Rental; Leasing
- Health Care; Social Assistance
- Government
- Prof.; Scientific; Tech.
- Mining (incl. fossil fuels)
- Accomodation; Food Services
- Finance; Ins.
- Other Services
- Admin & Waste Services
- Arts; Entertainment; Rec.
- Retail Trade
- Educational Services
- Wholesale Trade
- Transportation; Warehousing
- Utilities
- Information
- Mgmt. of Companies
- Forestry; Fishing; Ag. Services
- Construction
- Farm
- Mfg. (incl. forest products)

Source: BEA
Faster Rate of Job Growth

Higher Per Capita Income

The West

- Labor Earnings: 6%
- Non-Labor Income: 94%

Source: BEA
Natural Amenities Attract

Net Migration of Baby Boomers in Non-Metro Counties by Natural Amenity Quartiles, United States

Three Wests
The changed nature of production–growth of services + Amenity migration = Comparative Economic Advantage
Economists on Protected Lands

In 2011, more than 100 U.S. economists and related academics signed a letter urging the President to “create jobs and support businesses by investing in our public lands infrastructure and establishing new protected areas such as parks, wilderness, and monuments.”

The letter states that federal protected public lands are essential to the West’s economic future, attracting innovative companies and workers, and contributing a vital component of the region’s competitive advantage.

– Economist Letter on Value of Public Lands to President Obama
Where Now?

• Improve education and skill development
• Promote natural/social assets
• Non-labor income and retirement
• Invest in transportation and communications
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