

Minnesota Employment Review

Review
ONLINE

mn.gov/deed/review

January 2019 Data...February 2019 Issue



Southeast Minnesota - A Health Care Powerhouse

Job Trends

Health care is a dominant economic force in the Southeast region. From an industry perspective, health care is divided into three separate sub-sectors: ambulatory health care services, nursing and residential care facilities, and hospitals. Over the

last 10 years, based on 2nd quarter job estimates for 2009 to 2018, two of these three health care subsectors have seen an increase in jobs. Leading the way was ambulatory health care services, which saw an 18.4 percent increase in the number of jobs, equaling an additional 5,045 jobs in the region, followed by jobs in

hospitals which rose by 3.7 percent or 516 jobs. Nursing and residential care facilities, on the other hand, saw a 5 percent decline, equaling a drop of 626 jobs.

Occupational Statistics

Health care practitioners and technical occupations are the second highest

Features:

Where Does All of Minnesota's Income Come From?

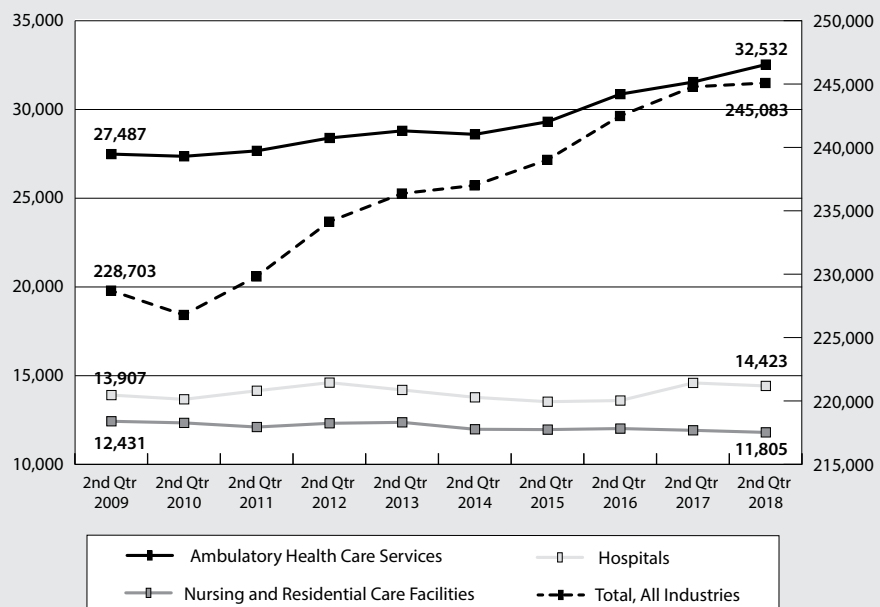
Having a Senior Moment

Industry Snapshots:
NAICS 721, 924, 925 and 926

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Figure 1. Health Care Industry Trends, Southeast MN



Source: DEED Quarterly Census of Employment and Wages.

employing occupational group in the region, just behind office and administrative support (Table 1). Overall, health care practitioners and technical occupations make up 11.3 percent of the total employment in the region with a location quotient of 1.8 which demonstrates a higher employment concentration in the region compared to that of the state. When occupations in health care support, which has a location quotient of 1.3, are added to the equation, health care becomes the highest employing occupational group in the region, making up 15.3 percent of total employment. In comparison, statewide health care practitioner and technical occupations make up only 6.4 percent of total statewide

employment, jumping only to 9.4 percent with the addition of health care support occupations.

Wages for both health care practitioners and support occupations are nothing to scoff at either. As shown in Figure 2, median health care wages range from \$36.24 for practitioners and technical occupations to \$16.00 per hour for support. To put that into perspective, the wages needed for the typical family to meet the basic cost of living needs in the region rest at \$16.17 – well covered by practitioner and technical occupations and just missing the mark for support occupations. Within both occupational groups, practitioner and technical wages range from

\$15.14 for veterinary technologists and technicians to over \$100 per hour for occupations such as dentists, anesthesiologists, internists, physicians and surgeons, while in support occupations the wages range from \$11.81 for pharmacy aides to \$24.54 for physical therapy assistants.

Job Vacancies

As of Q2 2018 there are over 9,600 job vacancies in the Southeast region with almost 14 percent of those in health care - 9.8 percent in health care practitioners and technical and another 4.1 percent in health care support. In general, support occupations have a higher percentage that are part-time while very few in either group are

Table 1. Percent of Total Employment by Occupational Group - Southeast MN

Occupational Group	Southeast	Percent	Minnesota	Percent
Total, All Occupations	238,090	100.0%	2,838,270	100.0%
Office and Administrative Support	31,810	13.4%	409,820	14.4%
Health Care Practitioners and Technical	26,950	11.3%	182,500	6.4%
Production	26,120	11.0%	217,610	7.7%
Sales and Related	20,370	8.6%	277,720	9.8%
Food Preparation and Serving Related	20,230	8.5%	239,950	8.5%
Transportation and Material Moving	14,660	6.2%	178,720	6.3%
Education, Training, and Library	14,620	6.1%	163,850	5.8%
Management	11,410	4.8%	168,930	6.0%
Health Care Support	9,610	4.0%	85,940	3.0%
Personal Care and Service	9,130	3.8%	139,210	4.9%
Installation, Maintenance, and Repair	8,240	3.5%	95,660	3.4%
Business and Financial Operations	7,820	3.3%	161,080	5.7%
Construction and Extraction	7,600	3.2%	99,900	3.5%
Building and Grounds Cleaning and Maintenance	7,580	3.2%	84,300	3.0%
Computer and Mathematical	5,510	2.3%	94,290	3.3%
Community and Social Services	4,340	1.8%	55,430	2.0%
Architecture and Engineering	3,390	1.4%	53,780	1.9%
Protective Service	3,160	1.3%	43,150	1.5%
Arts, Design, Entertainment, Sports, and Media	2,590	1.1%	36,910	1.3%
Life, Physical, and Social Science	1,920	0.8%	26,220	0.9%
Legal	610	0.3%	19,750	0.7%
Farming, Fishing, and Forestry	410	0.2%	3,540	0.1%

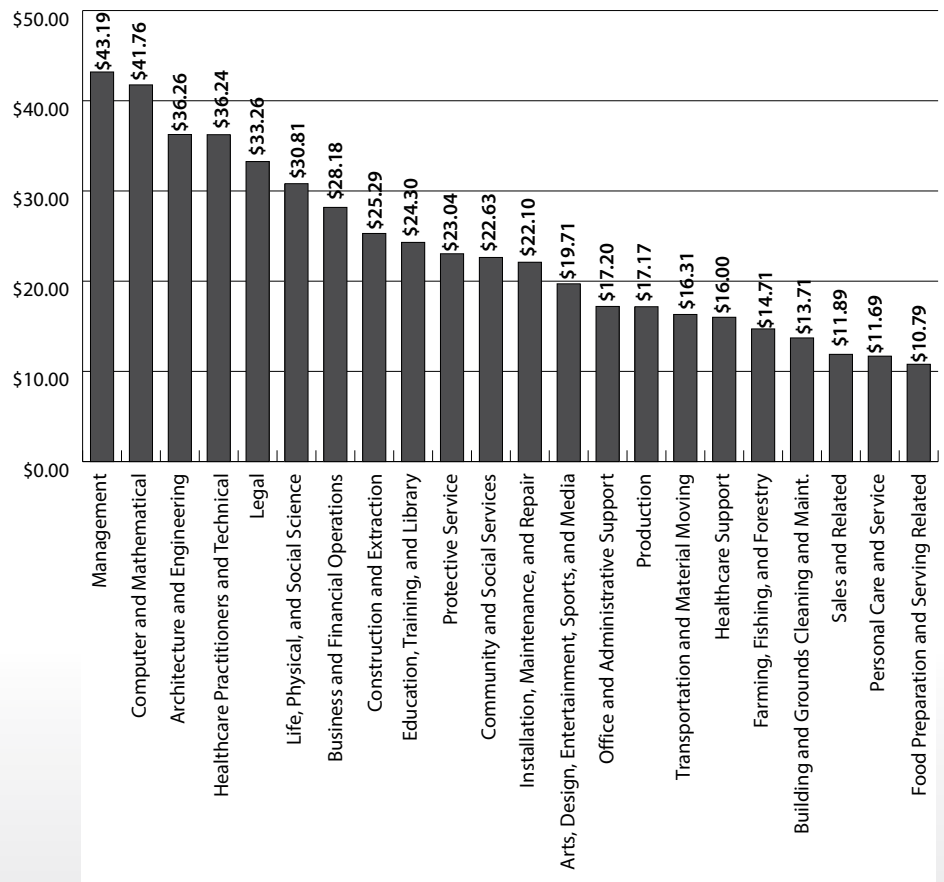
Source: DEED Occupational Employment Statistics

temporary or seasonal. While post-secondary education appears to be extremely important for the health care practitioner and technical openings, many fewer of the vacancies in health care support require education beyond high school. The same holds true for work experience requirements, where 35 to 100 percent of the vacancies for health care practitioners and technical require one or more years of experience but only 9 to 24 percent of the support vacancies require experience (Table 2).

Employment Projections

Health care looks to have a bright future, considering the number of openings projected from 2016 to 2026. Both health care practitioners and technical and health care support are anticipated to see job growth during this time, with the former seeing about 3,320 new job openings and an additional 854 for health care support. In addition to this job growth, there are predicted to be many more additional openings both from labor force exits (incumbents leaving the occupation and/or labor force) and occupational transfer openings (incumbents going from one job to another). In fact, health care practitioners are expected to

Figure 2. Median Wages by Occupational Group, Southeast Minnesota



Source: DEED Quarterly Census of Employment and Wages.

Table 2. Health Care Job Vacancies - Southeast MN

Occupations	Vacancies	Median Wage Offer	Part-Time	Temporary or Seasonal	Requires Post-Secondary Education	Requires 1+ Years Experience
Total, All Occupations	9,641	\$14.83	35%	9%	29%	38%
Health Care Practitioners and Technical Occupations	942	\$27.35	34%	1%	91%	63%
Health Diagnosing and Treating Practitioners	529	\$32.63	30%	2%	100%	85%
Health Technologists and Technicians	406	\$18.51	40%	1%	80%	35%
Other Health Care Practitioners and Technical	7	\$24.72	27%	0%	100%	100%
Health Care Support Occupations	400	\$13.17	54%	2%	35%	10%
Nursing, Psychiatric, and Home Health Aides	366	\$13.03	55%	2%	33%	9%
Other Health Care Support Occupations	31	\$17.07	39%	0%	55%	24%

Source: DEED Job Vacancy Survey

Table 3. Employment Projections - Southeast MN (2016-2026)

Title	Percent Change	Total Change	Labor Force Exit Openings	Occupational Transfer Openings	Total Hires
Total, All Occupations	4.6%	12,498	129,847	164,818	307,163
Health Care Practitioners and Technical	12.3%	3,320	7,802	7,631	18,753
Registered Nurses	11.3%	1,273	3,400	2,582	7,255
Licensed Practical and Licensed Vocational Nurses	8.3%	167	743	732	1,642
Emergency Medical Technicians and Paramedics	27.2%	259	188	444	891
Pharmacy Technicians	2.8%	29	343	469	841
Radiologic Technologists	14.2%	109	212	204	525
Medical Records and Health Info. Technicians	13.3%	90	212	215	517
Pharmacists	4.0%	30	175	146	351
Dental Hygienists	11.4%	47	158	98	303
Physical Therapists	15.7%	62	82	89	233
Opticians, Dispensing	-1.9%	-6	104	116	214
Nurse Anesthetists	15.1%	49	48	115	212
Veterinary Technologists and Technicians	6.6%	15	76	104	195
Occupational Therapists	10.4%	26	54	73	153
Dietitians and Nutritionists	13.6%	25	62	56	143
Speech-Language Pathologists	6.2%	13	39	68	120
Dentists, General	10.3%	22	41	17	80
Ophthalmic Medical Technicians	14.6%	12	29	39	80
Veterinarians	4.7%	8	33	29	70
Athletic Trainers	13.8%	12	21	25	58
Recreational Therapists	3.8%	2	15	14	31
Chiropractors	7.1%	6	15	7	28
Audiologists	16.7%	6	10	8	24
Surgeons	11.8%	2	3	2	7
Health Care Support	7.8%	854	6,520	6,131	13,505
Nursing Assistants	1.4%	54	2,384	1,984	4,422
Medical Assistants	27.4%	406	7,39	1,034	2,179
Dental Assistants	11.4%	50	237	266	553
Massage Therapists	11.5%	26	156	86	268
Veterinary Assistants and Lab Animal Caretakers	8.8%	12	83	134	229
Physical Therapist Assistants	17.0%	16	45	75	136
Occupational Therapy Assistants	8.7%	4	24	34	62

Source: DEED Employment Outlook

see a need for over 15,400 workers to fill openings left from exits and transfers while over 12,600 health care support workers will be needed to fill openings for these two reasons. In all, projected openings for health care practitioners and technical occupations make up 6.1 percent while support occupations are expected to comprise an additional 4.4 percent of the total openings projected during this 10 year period.

By far, the largest need for workers is expected for registered nurses, LPN’s, and both nursing and medical assistants.

Current labor market data show that health care is a dominant industry and occupational group in the Southeast Economic Development Region, seeing an overall increase in jobs over the last 10 years, making up a large portion of current

employment, having a large number of current vacancies, and projected to see a sizable portion of future job openings. Whether you are a young person starting your education or career or someone looking to move on to a new career, current regional residents as well as non-residents looking to move elsewhere are likely to find work in health care in Southeast Minnesota.

by Mark Schultz

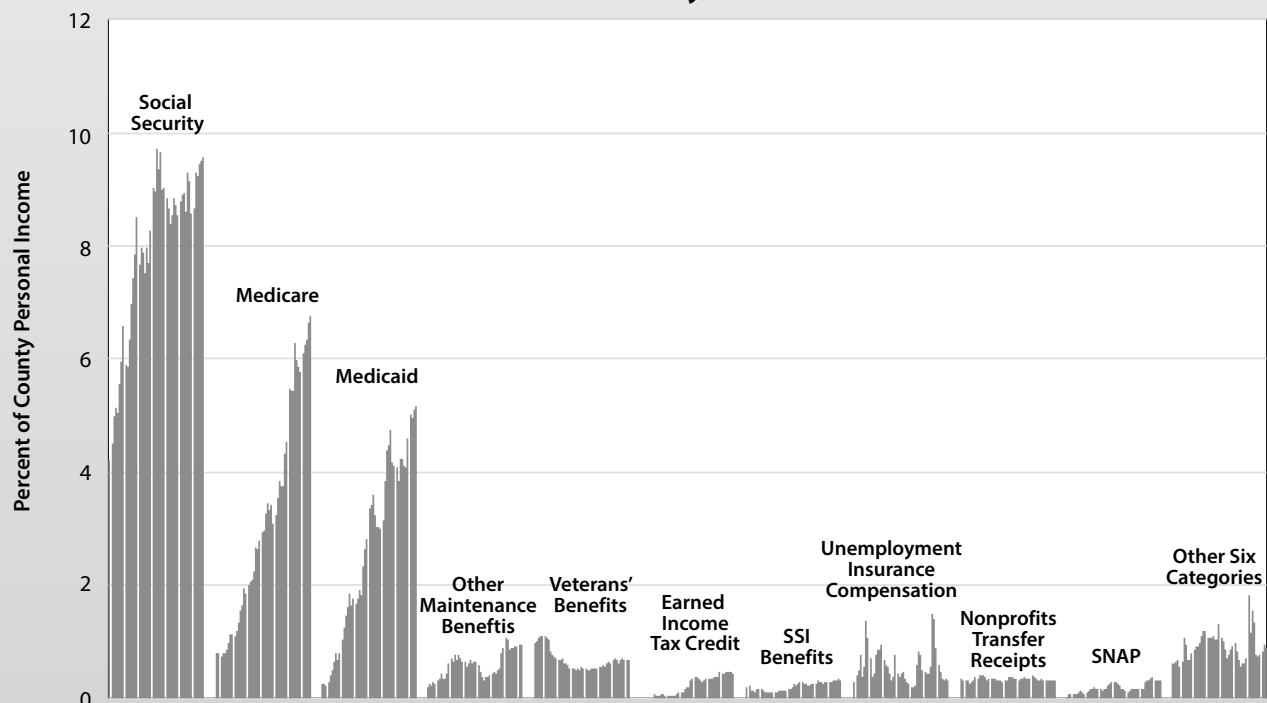
Personal income in Minnesota, as measured by the Bureau of Economic Analysis (BEA), was 2.2 times higher in 2017 than in 1998 without adjusting for inflation. A growing component of personal income, transfer payments – including Social Security, Medicare, Medicaid, Veterans’ Benefits, Earned Income Tax Credit (EITC), and Supplemental Nutrition Assistance Program (SNAP) – climbed 3.1 times higher over the same time period. Transfer payments have gone from 10.8 percent of total personal income in 1998 to 15.6 percent in 2017 in Minnesota. At the national level, transfer payments have climbed from 13.0 percent in 1998 to 17.0 percent in 2017. Transfer payments are expected to continue to account for a higher share of Minnesota’s personal income as the state’s population ages.

Transfer payments as a percent of personal income in 2017 vary from slightly more than 34 percent in Aitkin, Wadena, and Mahnomen counties to less than 11 percent in Carver, Scott, and Washington counties. Transfer payments make up more than 20 percent of personal income in 55 of Minnesota’s 87 counties. The share of personal income accounted for by transfer payments is 13.9 percent in the metropolitan portion of the state and 23.6 percent in the nonmetropolitan portion. County level personal income, grouped into 16 categories, is published by the Bureau of Economic Analysis (BEA) at <https://apps.bea.gov/itable/iTable.cfm?ReqID=70&step=1>.

A Tableau visualization of all 16 transfer payments categories data published by the BEA for 1969 through 2017 for Minnesota and all 87 counties is available at

<https://public.tableau.com/profile/magda.olson#!/vizhome/CountyTransferPaymentsinMinnesota1969-2017/Sheet1?publish=yes>. Transfer payment data are displayed on a per capita, percent of state transfer payments, percent of county transfer payments, and percent of county personal income basis as well as the actual detailed annual transfer payment amounts.

Transfer Payments as a Percent of County Personal Income Freeborn County, 1969 to 2017



by Dave Senf

Labor Force Estimates

County/ Area

	Labor Force			Employment			Unemployment			Rate of Unemployment		
	Jan 2019	Dec 2018	Jan 2018	Jan 2019	Dec 2018	Jan 2018	Jan 2019	Dec 2018	Jan 2018	Jan 2019	Dec 2018	Jan 2018
United States ('000s) (Seasonally adjusted) (Unadjusted)	163,229	163,240	161,115	156,694	156,945	154,430	6,535	6,294	6,684	4.0%	3.9%	4.1%
	162,104	162,510	160,037	154,964	156,481	152,848	7,140	6,029	7,189	4.4	3.7	4.5
Minnesota (Seasonally adjusted) (Unadjusted)	3,082,404	3,076,979	3,062,941	2,990,501	2,989,037	2,968,707	91,903	87,942	94,234	3.0	2.9	3.1
	3,077,490	3,082,219	3,042,812	2,945,603	2,983,526	2,924,144	131,887	98,693	118,668	4.3	3.2	3.9
Metropolitan Statistical Areas (MSA)*												
Mpls.-St. Paul MSA	2,005,927	2,008,037	2,003,867	1,933,000	1,952,453	1,936,012	72,927	55,584	67,855	3.6	2.8	3.4
Duluth-Superior MSA	143,352	144,386	145,776	135,875	138,726	138,507	7,477	5,660	7,269	5.2	3.9	5.0
Rochester MSA	124,258	120,953	121,733	119,760	117,605	117,360	4,498	3,348	4,373	3.6	2.8	3.6
St. Cloud MSA	112,729	113,242	113,622	107,372	109,386	108,465	5,357	3,856	5,157	4.8	3.4	4.5
Mankato-N Mankato MSA	61,161	63,634	62,415	59,112	62,061	60,413	2,049	1,573	2,002	3.4	2.5	3.2
Fargo-Moorhead MSA												
Grand Forks MSA												
Region One	47,316	47,252	47,855	43,992	45,125	44,653	3,324	2,127	3,202	7.0	4.5	6.7
Kittson	2,320	2,357	2,343	2,190	2,274	2,232	130	83	111	5.6	3.5	4.7
Marshall	5,518	5,464	5,592	4,902	5,078	4,994	616	386	598	11.2	7.1	10.7
Norman	3,311	3,380	3,355	3,065	3,201	3,130	246	179	225	7.4	5.3	6.7
Pennington	9,037	8,851	9,047	8,304	8,385	8,306	733	466	741	8.1	5.3	8.2
Polk	16,846	17,045	17,187	15,933	16,423	16,323	913	622	864	5.4	3.6	5.0
Red Lake	2,246	2,222	2,268	2,049	2,110	2,076	197	112	192	8.8	5.0	8.5
Roseau	8,038	7,933	8,063	7,549	7,654	7,592	489	279	471	6.1	3.5	5.8
Region Two	43,767	43,794	44,123	40,450	41,434	40,868	3,317	2,360	3,255	7.6	5.4	7.4
Beltrami	24,426	24,044	24,075	22,961	22,953	22,582	1,465	1,091	1,493	6.0	4.5	6.2
Clearwater	4,670	4,678	4,946	4,007	4,295	4,255	663	383	691	14.2	8.2	14.0
Hubbard	9,832	10,361	10,266	8,906	9,689	9,468	926	672	798	9.4	6.5	7.8
Lake of the Woods	2,511	2,339	2,437	2,406	2,239	2,320	105	100	117	4.2	4.3	4.8
Mahnomen	2,328	2,372	2,399	2,170	2,258	2,243	158	114	156	6.8	4.8	6.5
Region Three	164,020	165,218	166,744	154,005	157,775	157,169	10,015	7,443	9,575	6.1	4.5	5.7
Aitkin	7,321	7,416	7,445	6,558	6,863	6,752	763	553	693	10.4	7.5	9.3
Carlton	17,818	18,001	18,207	16,725	17,190	17,124	1,093	811	1,083	6.1	4.5	5.9
Cook	2,883	3,390	3,381	2,655	3,234	3,204	228	156	177	7.9	4.6	5.2
Itasca	22,337	21,728	22,111	20,424	20,404	20,382	1,913	1,324	1,729	8.6	6.1	7.8
Koochiching	5,867	5,934	6,043	5,446	5,585	5,630	421	349	413	7.2	5.9	6.8
Lake	5,292	5,649	5,643	5,023	5,438	5,375	269	211	268	5.1	3.7	4.7
St. Louis	102,502	103,100	103,914	97,174	99,061	98,702	5,328	4,039	5,212	5.2	3.9	5.0
City of Duluth	45,672	46,308	46,420	43,997	44,974	44,811	1,675	1,334	1,609	3.7	2.9	3.5
Balance of St. Louis County	56,830	56,792	57,494	53,177	54,087	53,891	3,653	2,705	3,603	6.4	4.8	6.3
Region Four	125,841	128,943	128,511	119,013	124,004	122,262	6,828	4,939	6,249	5.4	3.8	4.9
Becker	18,400	19,117	19,040	17,262	18,315	17,941	1,138	802	1,099	6.2	4.2	5.8
Clay	35,674	35,966	36,125	34,125	34,922	34,637	1,549	1,044	1,488	4.3	2.9	4.1
Douglas	20,454	20,865	20,855	19,485	20,108	19,996	969	757	859	4.7	3.6	4.1
Grant	3,261	3,321	3,283	3,020	3,153	3,073	241	168	210	7.4	5.1	6.4
Otter Tail	31,142	32,315	32,067	29,004	30,737	30,175	2,138	1,578	1,892	6.9	4.9	5.9
Pope	6,409	6,439	6,365	6,110	6,210	6,092	299	229	273	4.7	3.6	4.3
Stevens	5,285	5,532	5,445	5,077	5,376	5,258	208	156	187	3.9	2.8	3.4
Traverse	1,718	1,823	1,818	1,613	1,747	1,721	105	76	97	6.1	4.2	5.3
Wilkin	3,498	3,565	3,513	3,317	3,436	3,369	181	129	144	5.2	3.6	4.1
Region Five	84,081	86,201	86,641	77,307	81,309	80,416	6,774	4,892	6,225	8.1	5.7	7.2
Cass	14,150	15,263	15,303	12,788	14,293	14,018	1,362	970	1,285	9.6	6.4	8.4
Crow Wing	32,095	33,402	33,482	29,883	31,751	31,389	2,212	1,651	2,093	6.9	4.9	6.3
Morrison	17,905	17,917	18,181	16,245	16,745	16,635	1,660	1,172	1,546	9.3	6.5	8.5
Todd	13,899	13,809	13,829	12,927	13,103	13,017	972	706	812	7.0	5.1	5.9
Wadena	6,032	5,810	5,846	5,464	5,417	5,357	568	393	489	9.4	6.8	8.4
Region Six East	66,516	67,491	67,682	62,750	64,898	64,388	3,766	2,593	3,294	5.7	3.8	4.9
Kandiyohi	24,996	25,359	25,223	23,680	24,444	24,091	1,316	915	1,132	5.3	3.6	4.5
McLeod	19,450	19,414	19,567	18,418	18,670	18,651	1,032	744	916	5.3	3.8	4.7
Meeker	13,185	13,362	13,429	12,347	12,809	12,710	838	553	719	6.4	4.1	5.4
Renville	8,885	9,356	9,463	8,305	8,975	8,936	580	381	527	6.5	4.1	5.6

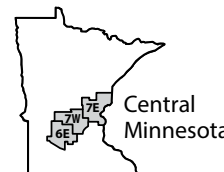
*Minneapolis-St. Paul Metropolitan Statistical Area (MSA) now includes Sherburne County in Minnesota and Pierce County in Wisconsin. St. Cloud MSA is now comprised of Benton and Stearns counties.

Numbers are unadjusted unless otherwise labeled.
 Source: Department of Employment and Economic Development,
 Local Area Unemployment Statistics, and North Dakota Job Service, 2019.

Labor Force Estimates

County/ Area

County/ Area	Labor Force			Employment			Unemployment			Rate of Unemployment		
	Jan 2019	Dec 2018	Jan 2018	Jan 2019	Dec 2018	Jan 2018	Jan 2019	Dec 2018	Jan 2018	Jan 2019	Dec 2018	Jan 2018
Region Six West	23,135	23,391	23,497	21,801	22,430	22,180	1,334	961	1,317	5.8%	4.1%	5.6%
Big Stone	2,435	2,631	2,684	2,245	2,498	2,506	190	133	178	7.8	5.1	6.6
Chippewa	6,914	6,893	6,902	6,550	6,626	6,537	364	267	365	5.3	3.9	5.3
Lac Qui Parle	3,448	3,467	3,520	3,248	3,332	3,316	200	135	204	5.8	3.9	5.8
Swift	4,986	5,080	5,100	4,674	4,852	4,786	312	228	314	6.3	4.5	6.2
Yellow Medicine	5,352	5,320	5,291	5,084	5,122	5,035	268	198	256	5.0	3.7	4.8
Region Seven East	89,371	88,821	89,705	82,643	84,439	83,642	6,728	4,382	6,063	7.5	4.9	6.8
Chisago	30,081	29,953	30,109	28,401	28,842	28,582	1,680	1,111	1,527	5.6	3.7	5.1
Isanti	21,562	21,328	21,467	20,170	20,388	20,204	1,392	940	1,263	6.5	4.4	5.9
Kanabec	9,256	9,162	9,391	8,275	8,542	8,476	981	620	915	10.6	6.8	9.7
Mille Lacs	13,287	13,159	13,349	12,043	12,363	12,249	1,244	796	1,100	9.4	6.0	8.2
Pine	15,185	15,219	15,389	13,754	14,304	14,131	1,431	915	1,258	9.4	6.0	8.2
Region Seven West	240,638	240,714	241,369	228,832	232,408	230,375	11,806	8,306	10,994	4.9	3.5	4.6
Benton	22,110	22,306	22,512	20,779	21,416	21,238	1,331	890	1,274	6.0	4.0	5.7
Sherburne	52,489	52,254	52,388	49,668	50,329	49,878	2,821	1,925	2,510	5.4	3.7	4.8
Stearns	90,619	90,936	91,110	86,593	87,970	87,227	4,026	2,966	3,883	4.4	3.3	4.3
Wright	75,420	75,218	75,359	71,792	72,693	72,032	3,628	2,525	3,327	4.8	3.4	4.4
Region Eight	63,341	63,909	64,027	60,262	61,853	61,051	3,079	2,056	2,976	4.9	3.2	4.6
Cottonwood	5,839	5,473	5,395	5,568	5,286	5,138	271	187	257	4.6	3.4	4.8
Jackson	5,652	5,569	5,707	5,388	5,394	5,477	264	175	230	4.7	3.1	4.0
Lincoln	3,191	3,316	3,327	3,013	3,197	3,151	178	119	176	5.6	3.6	5.3
Lyon	14,602	14,891	14,931	13,948	14,459	14,300	654	432	631	4.5	2.9	4.2
Murray	4,855	4,974	4,912	4,465	4,737	4,568	390	237	344	8.0	4.8	7.0
Nobles	11,195	11,245	11,400	10,772	10,940	10,941	423	305	459	3.8	2.7	4.0
Pipestone	4,961	4,985	4,982	4,661	4,827	4,729	300	158	253	6.0	3.2	5.1
Redwood	7,403	7,496	7,435	6,973	7,184	7,003	430	312	432	5.8	4.2	5.8
Rock	5,643	5,960	5,938	5,474	5,829	5,744	169	131	194	3.0	2.2	3.3
Region Nine	132,868	136,274	135,856	126,392	131,613	129,565	6,476	4,661	6,291	4.9	3.4	4.6
Blue Earth	40,385	42,045	41,265	38,999	40,977	39,885	1,386	1,068	1,380	3.4	2.5	3.3
Brown	14,562	14,480	14,723	13,702	13,954	13,925	860	526	798	5.9	3.6	5.4
Faribault	6,872	7,248	7,335	6,452	6,952	6,940	420	296	395	6.1	4.1	5.4
Le Sueur	16,354	16,138	16,358	15,091	15,251	15,106	1,263	887	1,252	7.7	5.5	7.7
Martin	10,146	10,316	10,309	9,673	9,941	9,884	473	375	425	4.7	3.6	4.1
Nicollet	20,776	21,589	21,150	20,113	21,084	20,528	663	505	622	3.2	2.3	2.9
Sibley	8,515	8,656	8,617	7,978	8,285	8,192	537	371	425	6.3	4.3	4.9
Waseca	8,707	9,344	9,659	8,220	8,974	9,022	487	370	637	5.6	4.0	6.6
Watonwan	6,551	6,458	6,440	6,164	6,195	6,083	387	263	357	5.9	4.1	5.5
Region Ten	283,885	281,704	282,732	272,749	273,392	272,069	11,136	8,312	10,663	3.9	3.0	3.8
Dodge	11,946	11,571	11,708	11,369	11,206	11,173	577	365	535	4.8	3.2	4.6
Fillmore	11,588	11,483	11,599	10,972	11,062	11,016	616	421	583	5.3	3.7	5.0
Freeborn	16,036	16,010	16,220	15,248	15,384	15,485	788	626	735	4.9	3.9	4.5
Goodhue	26,973	26,919	27,214	25,826	26,089	26,079	1,147	830	1,135	4.3	3.1	4.2
Houston	10,472	10,787	10,728	9,951	10,456	10,215	521	331	513	5.0	3.1	4.8
Mower	20,369	20,542	20,642	19,569	19,932	19,921	800	610	721	3.9	3.0	3.5
Olmsted	88,397	85,874	86,308	85,677	83,721	83,600	2,720	2,153	2,708	3.1	2.5	3.1
City of Rochester	65,307	63,316	63,572	63,388	61,747	61,658	1,919	1,569	1,914	2.9	2.5	3.0
Rice	36,992	37,273	37,155	35,465	36,118	35,772	1,527	1,155	1,383	4.1	3.1	3.7
Steele	20,212	20,250	19,968	19,326	19,610	19,093	886	640	875	4.4	3.2	4.4
Wabasha	12,327	12,025	12,118	11,742	11,616	11,571	585	409	547	4.7	3.4	4.5
Winona	28,573	28,970	29,072	27,604	28,198	28,144	969	772	928	3.4	2.7	3.2
Region Eleven	1,712,718	1,716,092	1,710,270	1,655,412	1,671,199	1,656,341	57,306	44,893	53,929	3.3	2.6	3.2
Anoka	197,576	197,151	196,784	189,783	191,336	189,634	7,793	5,815	7,150	3.9	2.9	3.6
Carver	57,859	57,804	57,619	55,901	56,312	55,798	1,958	1,492	1,821	3.4	2.6	3.2
Dakota	240,569	241,555	240,933	232,098	235,225	233,134	8,471	6,330	7,799	3.5	2.6	3.2
Hennepin	702,551	704,046	701,127	681,021	686,543	680,461	21,530	17,503	20,666	3.1	2.5	2.9
City of Bloomington	46,650	47,099	46,904	45,033	45,824	45,418	1,617	1,275	1,486	3.5	2.7	3.2
City of Minneapolis	241,065	240,306	239,331	233,615	234,326	232,250	7,450	5,980	7,081	3.1	2.5	3.0
Ramsey	288,824	289,761	288,677	279,057	281,965	279,460	9,767	7,796	9,217	3.4	2.7	3.2
City of St. Paul	158,442	158,941	158,302	153,017	154,547	153,174	5,425	4,394	5,128	3.4	2.8	3.2
Scott	83,031	83,110	82,847	80,167	80,893	80,171	2,864	2,217	2,676	3.4	2.7	3.2
Washington	142,308	142,665	142,283	137,385	138,925	137,683	4,923	3,740	4,600	3.5	2.6	3.2



Industrial Analysis

Overview

Employment in Minnesota was up in January as employers added 3,800 jobs (0.1 percent) on a seasonally adjusted basis. It was the first over-the-month increase since October of 2018. The private sector contributed 3,500 of those jobs (up 0.1 percent) while government employers added 300 (0.1 percent). Employment in goods production was off slightly (down 200, 0.0 percent) but was more than made up for by the addition of 4,000 service-providing jobs (up 0.2 percent). Annually the state added 7,803 jobs (0.3 percent). January's over-the-year growth was led by a strong Construction industry (up 8,941 or 9.7 percent). Goods producers as a whole added 9,777 jobs (2.3 percent) while service providers lost 1,974 (0.1 percent). The private sector added 8,565 jobs (0.3 percent) while government employers lost 3,483 (0.8 percent).

Mining and Logging

Mining and Logging employment was up by 100 (1.5 percent) in January. It was the second consecutive month of growth for the supersector. On an over-the-year basis the supersector added 91 jobs (1.5 percent). This growth reversed a trend of three straight months with over-the-year declines that included a drop of 3.1 percent in December of 2018.

Construction

Employment in the Construction supersector was flat in January, remaining at 128,700. It was the first month since April of 2018 that the supersector did not show monthly job growth. Annually the supersector added

8,941 jobs (8.7 percent), giving it by far the strongest over-the-year performance of any supersector in the state. Every component sector contributed to the growth, with the largest real and proportional increases coming in Specialty Trade Contracting, which added 6,395 jobs or 9.3 percent. Construction of Buildings employment was up by 2,091 or 8.3 percent.

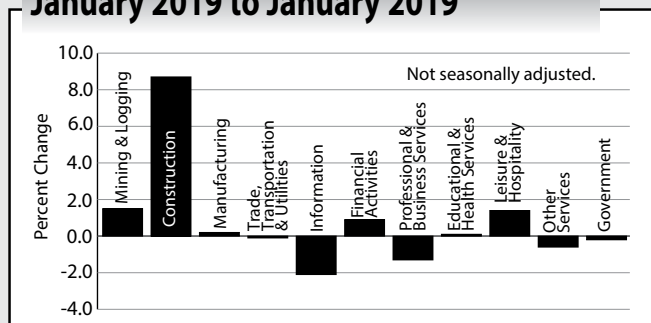
Manufacturing

Employment in the Manufacturing supersector was off by 300 (0.1 percent) in January. Durable Goods Manufacturers lost 400 jobs (0.2 percent) while Non-Durable Goods Manufacturers added 100 (0.1 percent). Annually the supersector added 745 jobs (0.2 percent). Durable Goods Manufacturers added 1,162 jobs (0.6 percent) on the strength of 1,297 jobs (3.1 percent) in Fabricated Metal Product Manufacturing. Non-Durable Goods Manufacturers lost 417 jobs (0.4 percent). The Food Manufacturing component was off by 1,106 (2.4 percent).

Trade, Transportation, and Utilities

Employment in Trade, Transportation, and Utilities was up by 1,400 (0.3 percent) in January. Retail Trade and Transportation, Warehousing, and Utilities each added 900 jobs (0.3 and 0.9 percent, respectively), while Wholesale Trade employment was off by 400 (0.3 percent). Over the year the supersector's employment was off by 287 (0.1 percent). That was the second consecutive month of over-the-year job losses in the supersector. Prior to December of 2018, the industry had not had an annual decline since September of 2010. The decline came courtesy of Transportation, Warehousing, and Utilities, which lost 674 jobs (0.6 percent) on the year after losing jobs in both Utilities (down 223 or 1.8 percent) and Transportation and Warehousing (down 451, 0.5 percent).

MN Employment Growth January 2019 to January 2019



Source: Department of Employment and Economic Development, Current Employment Statistics, 2019.

Information

The Information supersector lost 300 jobs (0.6 percent) in January. It has shown employment losses in five of the previous six months. Annually the supersector was off by 1,054 (2.1 percent). It has lost jobs on an over-the-year basis in every month since June of 2017 as the non-internet Publishing and Telecommunications industry groups continue their long descent.

*Over-the-year data are not seasonally adjusted because of small changes in seasonal adjustment factors from year to year. Also, there is no seasonality in over-the-year changes.

Industrial Analysis

Financial Activities

Financial Activities employment was up by 1,200 (0.7 percent) in January. Finance and Insurance employers added 1,100 jobs (0.7 percent) while Real Estate and Rental and Leasing employment was up by 100 (0.3 percent). On an over-the-year basis the supersector added 1,634 jobs (0.9 percent). Finance and Insurance added 1,482 jobs (1 percent), and Real Estate and Rental and Leasing added 152 (0.4 percent).

Professional and Business Services

Employment in Professional and Business Services was down slightly in January, off by 100 jobs (0.0 percent). Management of Companies and Enterprises and Administrative and Support and Waste Management and Remediation Services were both off by 400 jobs (0.5 and 0.3 percent, respectively), effectively offsetting the gain of 700 jobs (0.4 percent) in Professional, Scientific, and Technical Services. Over the year the supersector lost 4,940 jobs (1.3 percent). It was the first example of an over-the-year decline in the supersector since March of 2018 (a 0.1 percent decrease). January's decline came in large part from a loss of 8,969 jobs (6.5 percent) in Administrative and Support and Waste Management and Remediation Services, a loss which in turn was largely driven by a decline of 5,606 (10.3 percent) in Employment Services. The Employment Services sector, which is sometimes seen as a leading indicator for the larger labor market, has shown over-the-year declines in every month since August 2018, progressing from a loss of 0.6 percent to the current loss of 9.7 percent.

Educational and Health Services

The Educational and Health Services supersector lost 1,500 jobs (0.3 percent) in January. Both component sectors shed jobs, with Educational Services off 200 (0.3 percent) and Health Care and Social Assistance off by 1,300 (also 0.3 percent). Annually the supersector added 423 jobs (0.1 percent). The growth came from Health Care and Social Assistance, which added 1,405 jobs (0.3 percent) on the strength of 2,507 new jobs in Hospitals (up 2.2 percent) and 1,257 (1.7 percent) in Offices of Physicians. Educational Services lost 982 jobs (1.5 percent).

Leisure and Hospitality

Leisure and Hospitality employment was up by 2,200 (0.8 percent) in January. Accommodation and Food Services employment was up by 1,700 (0.7 percent) while Arts,

Entertainment, and Recreation employers added 500 jobs (1 percent). Annually the supersector added 3,645 jobs (1.4 percent). Arts, Entertainment, and Recreation led the way, adding 4,104 jobs (9.9 percent). Accommodation and Food Services actually lost jobs, off by 369 (0.2 percent) because of a decline of 3,663 (2.2 percent) in Restaurants and Other Eating Places.

Other Services

The Other Services supersector added 800 jobs (0.7 percent) in January. It was the second month in a row of over-the-year growth for the supersector. Annually Other Services lost 633 jobs (0.6 percent). Personal and Laundry Services lost 1,125 jobs (4 percent) while the other two component sectors posted job growth on the year.

Government

Government employers added 300 jobs (0.1 percent) in January. State and Local Governments both grew, while Federal employers shed 200 jobs (0.6 percent). Over the year Government employers lost 762 jobs (0.2 percent). Federal Government lost 696 jobs (2.2 percent), State lost 199 (0.2 percent), and Local Government employers added 133 jobs (0 percent).

by Nick Dobbins

Seasonally Adjusted Nonfarm Employment

In 1,000's

Industry	January 2019	December 2018	November 2018
Total Nonagricultural	2,964.9	2,961.1	2,961.9
Goods-Producing	457.3	457.5	455.0
Mining and Logging	6.8	6.7	6.5
Construction	128.7	128.7	126.8
Manufacturing	321.8	322.1	321.7
Service-Providing	2,507.6	2,503.6	2,506.9
Trade, Transportation, and Utilities	538.5	537.1	535.8
Information	48.6	48.9	49.0
Financial Activities	184.9	183.7	184.8
Professional and Business Services	375.5	375.6	378.3
Educational and Health Services	542.5	544.0	545.6
Leisure and Hospitality	279.9	277.7	276.4
Other Services	112.9	112.1	111.8
Government	424.8	424.5	425.2

Source: Department of Employment and Economic Development, Current Employment Statistics, 2019.

Regional Analysis

Minneapolis-St. Paul-Bloomington Metropolitan Statistical Area (MSA)

Employment in the Minneapolis-St. Paul-Bloomington MSA was off by 31,121 (1.6 percent) in January. While at first glance this appears to be a steep decline, it is very much in line with the usual monthly job losses in January. The losses were spread across most supersectors, although notable declines included Professional and Business Services, off by 10,271 or 3.2 percent, more than half of which came via the Employment Services industry, and Trade, Transportation, and Utilities, off by 9,089 or 2.4 percent, most of which came from the Retail Trade sector. As one of only two supersectors to add jobs on the month, Leisure and Hospitality bucked its own tradition of over-the-month losses, adding 710 jobs (0.4 percent). This is the only January on record with positive growth in the supersector. The metro area lost 505 jobs (0.0 percent) on an over-the-year basis. While small, it was the first month of over-the-year job losses for the area since July of 2010. The declines were concentrated in a couple of supersectors. Professional and Business Services lost 6,783 jobs (2.1 percent) thanks to a decline of 7,210 (6.7 percent) in Employment Services. Government employers lost 1,755 jobs (0.7 percent), with losses in Federal and Local Government.

Duluth-Superior MSA

The Duluth-Superior MSA lost 2,978 jobs (2.2 percent) in January. Every published supersector lost jobs on the month, with the steepest declines coming in Leisure and Hospitality (down 466 or 3.3 percent), Educational and Health Services (down 610, 1.9 percent), and Trade, Transportation, and Utilities (down 468, 1.9 percent, with losses

in all three component sectors). Over the year, employment in the Duluth MSA was mostly flat, off by eight jobs (0.0 percent). Declines in Educational and Health Services (425, 1.3 percent), Financial Activities (183, 3.2 percent), and Leisure and Hospitality (235, 1.7 percent) were mostly offset by gains in Professional and Business Services (up 384 or 5.2 percent) and Manufacturing (up 254, 3.3 percent).

Rochester MSA

Employment in the Rochester MSA was down by 1,346 (1.1 percent) in January. Government employers led the job losers, off by 325 jobs or 2.4 percent, thanks in large part to the loss of 283 jobs (2.6 percent) from Local Government employers. Educational and Health Services lost 316 jobs (0.6 percent), and Trade, Transportation, and Utilities lost 267 (1.5 percent). Over the year the Rochester area added 2,058 jobs (1.7 percent). Manufacturing employers added 561 jobs (5.4 percent), and Leisure and Hospitality added 608 (5.8 percent). The largest growth in terms of jobs added was Professional and Business Services, which added 652 jobs (1.3 percent). The Information supersector lost 162 jobs (9.2 percent) on the year.

St. Cloud MSA

Employment in the Saint Cloud MSA was off by 1,550 (1.4 percent) in January. Trade, Transportation, and Utilities lost 602 jobs (2.6 percent) with notable losses in all three component sectors. The only supersector to add jobs on the month was Financial Activities, which was up by 22 (0.4 percent). Annually the area added 1,521 jobs (1.4 percent). Educational and

Health Services led the way, adding 947 jobs (4.4 percent), while Manufacturing added 369 jobs of its own (up 2.5 percent). Trade, Transportation, and Utilities was down by 390 (1.7 percent), and Leisure and Hospitality was down 210 (2.6 percent).

Mankato-North Mankato MSA

The Mankato-North Mankato MSA lost 2,238 jobs (3.8 percent) in January. The private sector lost 2,074 jobs (4.2 percent) while the public sector lost 164 (1.6 percent). Service providers lost 1,751 jobs (3.6 percent), and goods producers lost 487 (4.7 percent). Annually the Mankato-North Mankato MSA lost 428 jobs (0.7 percent). The private sector lost 594 jobs (1.2 percent), but government employers added 166 (1.7 percent). Goods producers added 85 jobs (0.9 percent), but those gains were erased by the loss of 513 jobs (1.1 percent) among service providers.

Fargo-Moorhead MSA

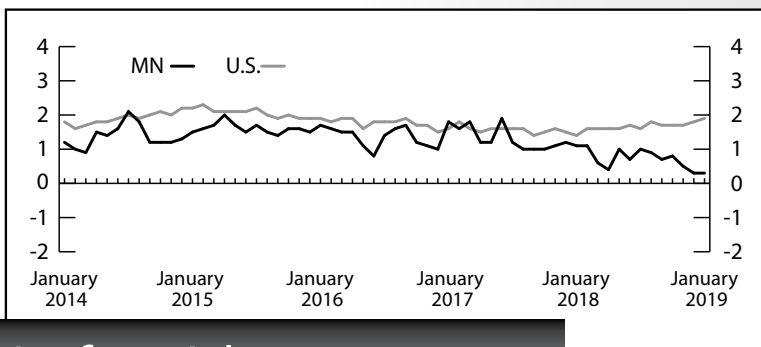
Employment in the Fargo-Moorhead MSA was down by 3,584 (2.5 percent) in January. Government employers lost 1,321 jobs (6.5 percent); Leisure and Hospitality lost 689 (5 percent). The only supersector in the area to add jobs on the month was Educational and Health Services, up by 1 (0.0 percent). Annually the Fargo-Moorhead area lost 157 jobs (0.1 percent). Trade, Transportation, and Utilities lost 340 jobs (1.1 percent), and Leisure and Hospitality lost 572 (4.2 percent). Losses were stemmed somewhat by the addition of 690 jobs (2.8 percent) in Educational and Health Services.

Grand Forks-East Grand Forks MSA

The Grand Forks-East Grand Forks MSA lost 838 jobs (1.5 percent) in January. Trade, Transportation, and Utilities lost 342 jobs (3 percent), and Mining, Logging, and Construction lost 154 (5.9 percent). In fact, every published supersector and component sector in the MSA lost jobs on the month. Annually the Grand Forks-East Grand Forks MSA lost 720 jobs (1.3 percent). Among the notable areas of negative growth were Government (off by 512, 3.6 percent), Leisure and Hospitality (off 283, 4.5 percent), and Trade, Transportation, and Utilities (off 313, 2.8 percent). The largest proportional growth came in Professional and Business Services (up 148 or 4.5 percent).

by Nick Dobbins

Source: Department of Employment and Economic Development, Current Employment Statistics, 2019; Bureau of Labor Statistics, U.S. Department of Labor, Current Employment Statistics, 2019.



Total Nonfarm Jobs U.S. and MN over-the-year percent change

Employer Survey of Minnesota Nonfarm Payroll Jobs, Hours and Earnings

Numbers are unadjusted.

Note: State, regional and local estimates from past months (for all tables pages 11-13) may be revised from figures previously published.

Industry

Industry	Jobs* (Thousands)			Percent Change From**		Production Workers Hours and Earnings					
	Jan 2019	Dec 2018	Jan 2018	Dec 2018	Jan 2018	Average Weekly Earnings		Average Weekly Hours		Average Hourly Earnings	
	Jan 2019	Jan 2018	Jan 2018	Jan 2018	Jan 2018	Jan 2019	Jan 2018	Jan 2019	Jan 2018	Jan 2019	Jan 2018
TOTAL NONFARM WAGE AND SALARY	2,906.8	2,956.8	2,899.0	-1.7%	0.3%	—	—	—	—	—	—
GOODS-PRODUCING	435.4	448.8	425.6	-3.0	2.3	—	—	—	—	—	—
Mining, Logging, and Construction	118.6	128.0	109.5	-7.4	8.2	—	—	—	—	—	—
Mining and Logging	6.4	6.4	6.3	0.0	1.5	—	—	—	—	—	—
Construction	112.2	121.6	103.3	-7.8	8.7	—	—	—	—	—	—
Specialty Trade Contractors	75.0	80.5	68.6	-6.8	9.3	\$1,181.45	\$1,222.07	36.6	37.8	\$32.3	\$32.33
Manufacturing	316.8	320.8	316.1	-1.2	0.2	902.25	864.96	40.1	40.4	22.5	21.41
Durable Goods	201.3	204.7	200.1	-1.7	0.6	925.11	901.91	39.4	40.7	23.5	22.16
Wood Product Manufacturing	11.5	11.9	11.4	-3.5	0.7	—	—	—	—	—	—
Fabricated Metal Production	43.7	43.8	42.4	-0.2	3.1	—	—	—	—	—	—
Machinery Manufacturing	34.4	34.6	33.2	-0.5	3.5	—	—	—	—	—	—
Computer and Electronic Product	45.8	45.8	45.0	0.0	1.8	—	—	—	—	—	—
Navigational, Measuring, Electromedical and Control	27.0	27.0	26.2	0.0	2.9	—	—	—	—	—	—
Transportation Equipment	10.9	10.9	10.6	-0.1	2.4	—	—	—	—	—	—
Medical Equipment and Supplies Manufacturing	16.3	16.3	16.0	-0.2	1.8	—	—	—	—	—	—
Nondurable Goods	115.5	116.1	115.9	-0.5	-0.4	865.20	804.38	41.2	39.9	21.0	20.16
Food Manufacturing	45.3	45.5	46.4	-0.6	-2.4	—	—	—	—	—	—
SERVICE-PROVIDING	532.8	547.7	533.1	-2.7	-0.1	—	—	—	—	—	—
Trade, Transportation, and Utilities	129.1	131.1	128.7	-1.5	0.3	1,157.58	917.56	39.2	37.9	29.5	24.21
Wholesale Trade	296.5	306.2	296.5	-3.2	0.0	418.08	422.83	26.0	27.6	16.1	15.32
Retail Trade	35.8	36.1	35.2	-0.9	1.6	—	—	—	—	—	—
Motor Vehicle and Parts	24.5	25.7	24.7	-4.5	-0.6	—	—	—	—	—	—
Building Material and Garden Equipment	56.1	57.1	55.7	-1.7	0.8	—	—	—	—	—	—
Food and Beverage Stores	25.6	26.0	25.4	-1.5	0.8	—	—	—	—	—	—
Gasoline Stations	63.2	66.9	62.3	-5.5	1.5	352.42	371.28	26.3	28.0	13.4	13.26
General Merchandise Stores	2,471.4	2,508.0	2,473.4	-1.5	-0.1	—	—	—	—	—	—
Transportation, Warehouse, Utilities	107.2	110.5	107.9	-2.9	-0.6	—	—	—	—	—	—
Transportation and Warehousing	95.2	98.2	95.7	-3.0	-0.5	715.34	740.99	30.9	34.1	23.2	21.73
Information	48.6	49.5	49.6	-1.9	-2.1	—	—	—	—	—	—
Publishing Industries	18.7	18.9	19.0	-1.3	-1.5	—	—	—	—	—	—
Telecommunications	11.9	12.1	12.8	-1.6	-7.3	—	—	—	—	—	—
Financial Activities	183.6	183.9	181.9	-0.2	0.9	—	—	—	—	—	—
Finance and Insurance	149.4	149.3	147.9	0.1	1.0	1,198.80	1,147.43	37.0	37.4	32.4	30.68
Credit Intermediation	64.5	64.2	64.4	0.5	0.1	802.96	794.73	36.3	35.4	22.1	22.45
Securities, Commodity Contracts, and Other	20.2	20.2	20.0	0.1	1.3	—	—	—	—	—	—
Insurance Carriers and Related	64.7	64.9	63.6	-0.3	1.8	—	—	—	—	—	—
Real Estate and Rental and Leasing	34.1	34.5	34.0	-1.2	0.4	—	—	—	—	—	—
Professional and Business Services	366.9	377.5	371.9	-2.8	-1.3	—	—	—	—	—	—
Professional, Scientific, and Technical Services	161.8	162.6	161.3	-0.5	0.3	—	—	—	—	—	—
Legal Services	18.0	18.4	18.0	-1.9	0.1	—	—	—	—	—	—
Accounting, Tax Preparation	15.9	14.8	16.3	7.4	-2.2	—	—	—	—	—	—
Computer Systems Design	35.5	36.3	37.1	-2.3	-4.4	—	—	—	—	—	—
Management of Companies and Enterprises	80.1	81.2	80.0	-1.4	0.2	—	—	—	—	—	—
Administrative and Support Services	125.0	133.7	130.6	-6.5	-4.3	—	—	—	—	—	—
Educational and Health Services	537.9	543.7	537.4	-1.1	0.1	—	—	—	—	—	—
Educational Services	65.5	67.8	66.5	-3.5	-1.5	—	—	—	—	—	—
Health Care and Social Assistance	472.4	475.9	471.0	-0.7	0.3	—	—	—	—	—	—
Ambulatory Health Care	156.4	157.8	155.8	-0.9	0.4	1,191.17	1,361.97	35.2	37.0	33.8	36.81
Offices of Physicians	75.6	75.9	74.3	-0.4	1.7	—	—	—	—	—	—
Hospitals	115.5	115.5	113.0	0.0	2.2	—	—	—	—	—	—
Nursing and Residential Care Facilities	106.7	106.9	107.4	-0.2	-0.7	515.21	487.35	28.2	29.2	18.3	16.69
Social Assistance	93.7	95.6	94.7	-1.9	-1.0	—	—	—	—	—	—
Leisure and Hospitality	262.6	263.2	259.0	-0.2	1.4	—	—	—	—	—	—
Arts, Entertainment, and Recreation	44.6	44.1	40.5	1.0	9.9	—	—	—	—	—	—
Accommodation and Food Services	218.1	219.1	218.4	-0.5	-0.2	—	—	—	—	—	—
Food Services and Drinking Places	192.0	192.7	192.7	-0.4	-0.3	279.77	263.15	19.8	19.0	14.1	13.85
Other Services	112.1	112.2	112.8	-0.1	-0.6	—	—	—	—	—	—
Religious, Grantmaking, Civic, Professional Organizations	63.5	63.1	63.4	0.7	0.2	—	—	—	—	—	—
Government	426.9	430.4	427.7	-0.8	-0.2	—	—	—	—	—	—
Federal Government	31.6	32.0	32.3	-1.3	-2.2	—	—	—	—	—	—
State Government	101.6	99.5	101.8	2.2	-0.2	—	—	—	—	—	—
State Government Education	60.8	58.6	62.3	3.8	-2.4	—	—	—	—	—	—
Local Government	293.7	299.0	293.6	-1.7	0.0	—	—	—	—	—	—
Local Government Education	148.7	150.0	149.0	-0.9	-0.2	—	—	—	—	—	—

Note: Not all industry subgroups are shown for every major industry category.

* Totals may not add because of rounding.

** Percent change based on unrounded numbers.

Source: Department of Employment and Economic Development, Current Employment Statistics, 2019.

Employer Survey of Twin Cities Nonfarm Payroll Jobs, Hours and Earnings

Numbers are unadjusted.

Note: State, regional and local estimates from past months (for all tables pages 11-13) may be revised from figures previously published.

Industry	Jobs*			Percent Change		Production Workers Hours and Earnings					
	(Thousands)			From**		Average Weekly Earnings		Average Weekly Hours		Average Hourly Earnings	
	Jan 2019	Dec 2018	Jan 2018	Dec 2018	Jan 2018	Jan 2019	Jan 2018	Jan 2019	Jan 2018	Jan 2019	Jan 2018
TOTAL NONFARM WAGE AND SALARY	1,979.9	2,011.1	1,980.4	-1.6%	0.0%	—	—	—	—	—	—
GOODS-PRODUCING	270.9	277.4	267.8	-2.3	1.2	—	—	—	—	—	—
Mining, Logging, and Construction	73.5	77.8	72.0	-5.6	2.0	—	—	—	—	—	—
Construction of Buildings	17.9	18.6	17.5	-4.1	2.4	—	—	—	—	—	—
Specialty Trade Contractors	47.1	51.3	48.9	-8.2	-3.7	\$1,176.94	\$1,248.33	34.8	36.9	\$33.82	\$33.83
Manufacturing	197.5	199.6	195.8	-1.1	0.9	932.84	908.96	40.4	41.6	23.09	21.85
Durable Goods	136.2	137.6	133.1	-1.1	2.3	967.21	948.36	40.2	42.0	24.06	22.58
Fabricated Metal Production	30.2	30.3	29.5	-0.2	2.5	—	—	—	—	—	—
Machinery Manufacturing	20.7	20.8	20.1	-0.6	2.8	—	—	—	—	—	—
Computer and Electronic Product	37.4	37.4	36.5	-0.1	2.5	—	—	—	—	—	—
Navigational, Measuring, Electromedical and Control	25.3	25.3	24.6	0.0	3.0	—	—	—	—	—	—
Medical Equipment and Supplies Manufacturing	15.5	15.4	15.1	0.8	2.7	—	—	—	—	—	—
Nondurable Goods	61.3	61.9	62.7	-1.0	-2.2	864.63	829.87	40.9	40.8	21.14	20.34
Food Manufacturing	13.8	14.0	14.3	-1.1	-3.7	—	—	—	—	—	—
Printing and Related	13.6	13.7	14.2	-0.7	-4.1	—	—	—	—	—	—
SERVICE-PROVIDING	1,709.0	1,733.8	1,712.6	-1.4	-0.2	—	—	—	—	—	—
Trade, Transportation, and Utilities	363.0	372.1	359.2	-2.4	1.1	—	—	—	—	—	—
Wholesale Trade	94.6	95.4	93.6	-0.8	1.1	1,128.10	898.75	38.9	37.2	29.00	24.16
Merchant Wholesalers - Durable Goods	55.0	55.6	53.8	-1.1	2.3	—	—	—	—	—	—
Merchant Wholesalers - Nondurable Goods	31.9	32.2	32.3	-1.1	-1.1	—	—	—	—	—	—
Retail Trade	191.7	198.6	190.1	-3.5	0.9	422.39	442.32	26.7	28.5	15.82	15.52
Food and Beverage Stores	35.3	36.0	35.0	-2.1	0.8	—	—	—	—	—	—
General Merchandise Stores	41.3	43.9	39.3	-6.0	5.0	334.33	364.22	25.1	28.3	13.32	12.87
Transportation, Warehouse, Utilities	76.7	78.1	75.5	-1.8	1.6	—	—	—	—	—	—
Utilities	7.3	7.5	7.4	-1.7	-1.0	—	—	—	—	—	—
Transportation and Warehousing	69.4	70.6	68.1	-1.8	1.9	796.02	766.09	34.7	35.5	22.94	21.58
Information	37.2	37.4	37.9	-0.8	-1.9	—	—	—	—	—	—
Publishing Industries	15.3	15.5	15.3	-1.1	-0.2	—	—	—	—	—	—
Telecommunications	7.7	7.8	8.3	-1.2	-6.9	—	—	—	—	—	—
Financial Activities	149.2	149.2	147.6	-0.1	1.0	—	—	—	—	—	—
Finance and Insurance	121.5	121.5	120.3	0.1	1.0	1,232.25	1,219.05	37.5	37.8	32.86	32.25
Credit Intermediation	48.5	48.3	48.3	0.4	0.3	—	—	—	—	—	—
Securities, Commodity Contracts, and Other	18.0	18.0	17.9	0.3	0.6	—	—	—	—	—	—
Insurance Carriers and Related	55.0	55.2	54.1	-0.3	1.8	—	—	—	—	—	—
Real Estate and Rental and Leasing	27.6	27.8	27.3	-0.6	1.1	—	—	—	—	—	—
Professional and Business Services	315.5	325.8	322.3	-3.2	-2.1	—	—	—	—	—	—
Professional, Scientific, and Technical Services	141.9	143.4	141.7	-1.0	0.2	—	—	—	—	—	—
Legal Services	15.5	15.9	15.4	-2.1	0.6	—	—	—	—	—	—
Architectural, Engineering, and Related	19.5	19.6	18.8	-0.4	3.8	—	—	—	—	—	—
Computer Systems Design	33.1	33.9	34.1	-2.2	-2.9	—	—	—	—	—	—
Management of Companies and Enterprises	73.5	74.7	73.3	-1.6	0.3	—	—	—	—	—	—
Administrative and Support Services	100.1	107.7	107.3	-7.1	-6.7	—	—	—	—	—	—
Employment Services	45.5	50.9	49.9	-10.6	-8.8	—	—	—	—	—	—
Educational and Health Services	331.1	336.4	332.9	-1.6	-0.5	—	—	—	—	—	—
Educational Services	43.8	46.4	45.3	-5.7	-3.3	—	—	—	—	—	—
Health Care and Social Assistance	287.4	290.0	287.7	-0.9	-0.1	—	—	—	—	—	—
Ambulatory Health Care	92.2	93.7	92.5	-1.6	-0.4	—	—	—	—	—	—
Hospitals	68.4	68.5	66.9	-0.1	2.3	—	—	—	—	—	—
Nursing and Residential Care Facilities	58.2	58.2	58.8	0.0	-1.0	—	—	—	—	—	—
Social Assistance	68.6	69.6	69.5	-1.5	-1.3	—	—	—	—	—	—
Leisure and Hospitality	184.8	184.1	182.5	0.4	1.2	—	—	—	—	—	—
Arts, Entertainment, and Recreation	33.7	33.2	32.4	1.5	4.0	—	—	—	—	—	—
Accommodation and Food Services	151.1	150.9	150.1	0.1	0.6	321.43	287.85	21.4	20.3	15.02	14.18
Food Services and Drinking Places	136.1	136.0	135.6	0.1	0.3	315.88	281.36	21.3	19.8	14.83	14.21
Other Services	77.9	78.4	78.1	-0.6	-0.3	—	—	—	—	—	—
Repair and Maintenance	14.6	14.7	14.2	-1.1	3.0	—	—	—	—	—	—
Religious, Grantmaking, Civic, Professional Organizations	41.7	41.9	41.9	-0.6	-0.5	—	—	—	—	—	—
Government	250.3	250.3	252.1	0.0	-0.7	—	—	—	—	—	—
Federal Government	21.1	21.3	21.5	-0.9	-1.6	—	—	—	—	—	—
State Government	66.8	65.9	66.6	1.4	0.3	—	—	—	—	—	—
State Government Education	39.2	38.2	40.2	2.4	-2.5	—	—	—	—	—	—
Local Government	162.4	163.1	164.0	-0.4	-1.0	—	—	—	—	—	—
Local Government Education	91.4	91.6	92.7	-0.2	-1.4	—	—	—	—	—	—

Note: Not all industry subgroups are shown for every major industry category.

* Totals may not add because of rounding.

** Percent change based on unrounded numbers.

Source: Department of Employment and Economic Development, Current Employment Statistics, 2019.

Employer Survey

Industry

TOTAL NONFARM WAGE AND SALARY

GOODS-PRODUCING

Mining, Logging, and Construction
Manufacturing

SERVICE-PROVIDING

Trade, Transportation, and Utilities
Wholesale Trade
Retail Trade
Transportation, Warehouse, Utilities
Information
Financial Activities
Professional and Business Services
Educational and Health Services
Leisure and Hospitality
Other Services
Government

Duluth-Superior MSA

Jobs % Chg. From

Jan 2019	Dec 2018	Jan 2018	Dec 2018	Jan 2018
134,110	137,088	134,118	-2.2%	0.0%
16,711	17,398	15,905	-3.9	5.1
8,854	9,482	8,302	-6.6	6.6
7,857	7,916	7,603	-0.7	3.3
117,399	119,690	118,213	-1.9	-0.7
24,495	24,963	24,610	-1.9	-0.5
3,189	3,236	3,264	-1.5	-2.3
14,905	15,056	14,996	-1.0	-0.6
6,401	6,671	6,350	-4.0	0.8
1,251	1,268	1,331	-1.3	-6.0
5,479	5,573	5,662	-1.7	-3.2
7,764	7,811	7,380	-0.6	5.2
31,904	32,514	32,329	-1.9	-1.3
13,460	13,926	13,695	-3.3	-1.7
6,548	6,640	6,647	-1.4	-1.5
26,498	26,995	26,559	-1.8	-0.2

Rochester MSA

Jobs % Chg. From

Jan 2019	Dec 2018	Jan 2018	Dec 2018	Jan 2018
121,658	123,004	119,600	-1.1%	1.7%
15,143	15,474	14,272	-2.1	6.1
4,286	4,674	3,976	-8.3	7.8
10,857	10,800	10,296	0.5	5.4
106,515	107,530	105,328	-0.9	1.1
17,834	18,101	17,916	-1.5	-0.5
2,762	2,828	2,770	-2.3	-0.3
12,445	12,546	12,406	-0.8	0.3
2,627	2,727	2,740	-3.7	-4.1
1,599	1,621	1,761	-1.4	-9.2
2,733	2,737	2,785	-0.1	-1.9
5,909	6,002	5,813	-1.5	1.7
50,672	50,988	50,020	-0.6	1.3
11,078	11,010	10,470	0.6	5.8
3,737	3,793	3,719	-1.5	0.5
12,953	13,278	12,844	-2.4	0.8

Employer Survey

Industry

TOTAL NONFARM WAGE AND SALARY

GOODS-PRODUCING

Mining, Logging, and Construction
Manufacturing

SERVICE-PROVIDING

Trade, Transportation, and Utilities
Wholesale Trade
Retail Trade
Transportation, Warehouse, Utilities
Information
Financial Activities
Professional and Business Services
Educational and Health Services
Leisure and Hospitality
Other Services
Government

St. Cloud MSA

Jobs % Chg. From

Jan 2019	Dec 2018	Jan 2018	Dec 2018	Jan 2018
108,642	110,192	107,121	-1.4%	1.4%
21,712	22,112	20,320	-1.8	6.9
6,368	6,706	5,345	-5.0	19.1
15,344	15,406	14,975	-0.4	2.5
86,930	88,080	86,801	-1.3	0.1
22,184	22,786	22,574	-2.6	-1.7
5,043	5,098	4,913	-1.1	2.6
13,009	13,491	13,580	-3.6	-4.2
4,132	4,197	4,081	-1.5	1.2
1,297	1,336	1,426	-2.9	-9.0
5,195	5,173	5,222	0.4	-0.5
8,497	8,626	8,647	-1.5	-1.7
22,653	22,708	21,706	-0.2	4.4
8,013	8,146	8,223	-1.6	-2.6
3,747	3,774	3,770	-0.7	-0.6
15,344	15,531	15,233	-1.2	0.7

Mankato MSA

Jobs % Chg. From

Jan 2019	Dec 2018	Jan 2018	Dec 2018	Jan 2018
56,913	59,151	57,341	-3.8	-0.7%
9,928	10,415	9,843	-4.7	0.9
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46,985	48,736	47,498	-3.6	-1.1
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9,815	9,979	9,649	-1.6	1.7

Employer Survey

Industry

TOTAL NONFARM WAGE AND SALARY

GOODS-PRODUCING

Mining, Logging, and Construction
Manufacturing

SERVICE-PROVIDING

Trade, Transportation, and Utilities
Wholesale Trade
Retail Trade
Transportation, Warehouse, Utilities
Information
Financial Activities
Professional and Business Services
Educational and Health Services
Leisure and Hospitality
Other Services
Government

Fargo-Moorhead MSA

Jobs % Chg. From

Jan 2019	Dec 2018	Jan 2018	Dec 2018	Jan 2018
139,175	142,759	139,332	-2.5%	-0.1%
17,639	18,353	17,219	-3.9	2.4
7,433	8,011	7,351	-7.2	1.1
10,206	10,342	9,868	-1.3	3.4
121,536	124,406	122,113	-2.3	-0.5
29,866	30,527	30,206	-2.2	-1.1
8,813	8,891	8,808	-0.9	0.1
15,217	15,649	15,758	-2.8	-3.4
5,836	5,987	5,640	-2.5	3.5
2,949	2,983	3,110	-1.1	-5.2
11,044	11,059	11,058	-0.1	-0.1
15,446	15,554	15,589	-0.7	-0.9
6,978	6,950	6,744	0.4	3.5
25,071	25,070	24,381	0.0	2.8
13,045	13,734	13,617	-5.0	-4.2
4,959	5,002	4,962	-0.9	-0.1
19,156	20,477	19,190	-6.5	-0.2

Grand Forks-East Grand Forks MSA

Jobs % Chg. From

Jan 2019	Dec 2018	Jan 2018	Dec 2018	Jan 2018
55,354	56,192	56,074	-1.5%	-1.3%
6,833	7,004	6,733	-2.4	1.5
2,451	2,605	2,400	-5.9	2.1
4,382	4,399	4,333	-0.4	1.1
48,521	49,188	49,341	-1.4	-1.7
11,032	11,374	11,345	-3.0	-2.8
1,843	1,860	1,817	-0.9	1.4
6,910	7,211	7,313	-4.2	-5.5
2,279	2,303	2,215	-1.0	2.9
565	568	593	-0.5	-4.7
1,970	2,029	1,915	-2.9	2.9
3,431	3,441	3,283	-0.3	4.5
9,771	9,818	9,615	-0.5	1.6
6,013	6,080	6,296	-1.1	-4.5
1,916	1,942	1,959	-1.3	-2.2
13,823	13,936	14,335	-0.8	-3.6

Source: Department of Employment and Economic Development, Current Employment Statistics, and North Dakota Job Service, 2019.

Minnesota Economic Indicators

Highlights

The Minnesota Index, U.S. Index, and Minnesota Leading Index are generated by the Philadelphia Federal Reserve Bank. At the beginning of each year the indices are delayed by two months as revised component numbers are used to recalibrate the indices. Updated coincident indices are scheduled for release on April 1 (www.philadelphiafed.org/research-and-data/regional-economy/indexes/coincident/) while leading indices will be released April 4 (www.philadelphiafed.org/research-and-data/regional-economy/indexes/leading/).

After two months of small decreases, Minnesota's adjusted **Wage and Salary Employment** rose in January by 3,800 jobs. Revised employment numbers show that average monthly seasonally adjusted employment growth was just 1,525 in 2018, so job growth got off to a good start in January. The state added 11,500 jobs during the first half of 2018 and 6,800 during the second half, adding up to 18,300 new jobs between December 2017 and 2018. Over-the-year job growth, using seasonally adjusted numbers, was estimated at 32,200 between December 2017 and December 2018 before being revised down to 18,300 during the annual benchmarking of employment data.

All of January's job growth was on the service-providing side as goods-producing jobs were reduced by 400 positions. Payroll numbers increased the most in Leisure and Hospitality, Trade, Transportation, and Utilities, and Financial Activities. Payrolls

were trimmed the most in Education and Health.

Minnesota's unadjusted over-the-year job growth held steady at 0.3 percent in January. The annual average job growth rate was revised down from 1.2 to 0.7 percent for 2018, the lowest annual rate since 2010. The 0.7 percent annual average increase translates into 22,000 jobs on an annual average basis in 2018 compared to 38,500 in 2017 when job growth was 1.3 percent. Annual average job growth nationally in 2018 was 1.6 percent, matching the 2017 rate.

Online Help-Wanted Ads climbed to 143,350 in January which is the fourth highest level over the 14 years of online job posting data. Minnesota's job posting was up 0.5 percent compared to 1.5 percent nationwide. Minnesota's share of online help-wanted remained at 2.7 percent.

Minnesota's **Purchasing Managers' Index (PMI)** reversed direction in January, slipping to 54.5 from 55.5. The two other comparable indices both increased in January with the Mid-America Business Index advancing to 56.0 and the national PMI climbing to 56.5. Minnesota is one of nine states covered in the Mid-America Index.

Minnesota's index peaked in the middle of 2018 and has been trending downwards over the last six months. The downward drift suggests that Minnesota's economy will continue to expand over the first half of 2019, but the pace will be slower than in 2018.

Adjusted average weekly **Manufacturing Hours** dropped to 40.5 hours in December, its lowest level since October 2017. The annual average factory workweek for 2018

was 40.8 hours in 2018, just slightly down from 40.9 in 2017. The 40.8 average factory workweek in 2018 was higher than the 49-year average of 40.5 hours. Average weekly Manufacturing Earnings, adjusted for inflation and seasonality, slipped slightly in January to \$908.24. That was up 2.6 percent in real terms from last January.

The adjusted **Residential Building Permits** level rebounded from the second-lowest monthly level over the last five years in December to 2,080 in January. Home-building permits have averaged roughly 2,100 over the last 39 years, so January's level was right around average.

The 26,318 permit total issued in 2018 was 8.7 percent higher than the 2017 permits. Home-building permits bottomed out in 2011 when only 8,309 permits were issued. A record 40,659 home-building permits were issued in 2004 at the peak of the housing boom. Minnesota's home-building permits were 2.0 percent of total U.S. home-building permits in 2018 which is slightly higher than Minnesota's 1.7 percent share of U.S. population.

Adjusted **Initial Claims for Unemployment Benefits (UB)** increased to 17,077 in January, continuing a slight upward trend over the last few months. Initial claims, which is a proxy for the layoff rate, remains low by historical standards despite the recent upward drift.

by Dave Senf

INA

2018 Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2019 Jan
% Chg From
Month Ago
Year Ago

Source: The Federal Reserve Bank of Philadelphia, 2019

Minnesota Index

United States Index

INA

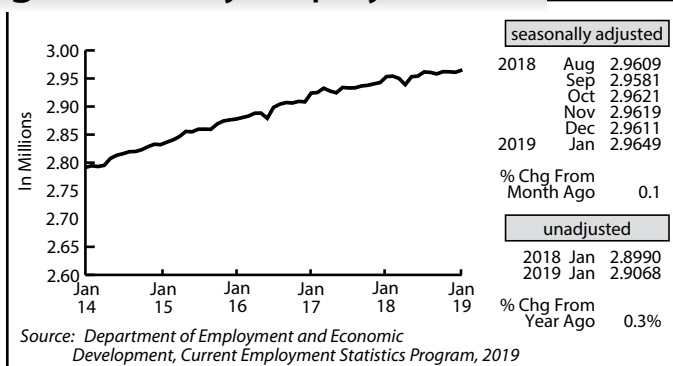
2018 Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
2019 Jan
% Chg From
Month Ago
Year Ago

Source: The Federal Reserve Bank of Philadelphia, 2019

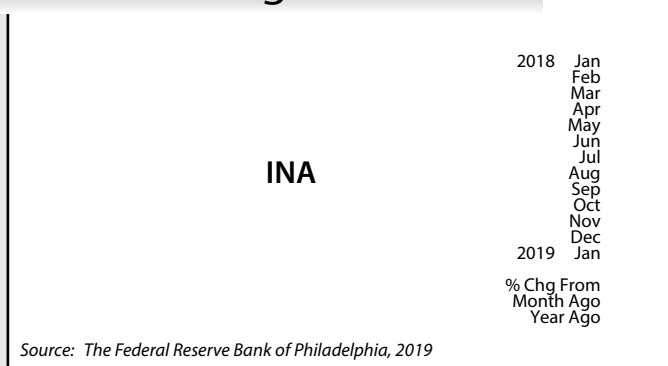
Note: All data except for Minnesota's PMI have been seasonally adjusted. See the feature article in the Minnesota Employment Review, May 2010, for more information on the Minnesota Index.

Minnesota Economic Indicators

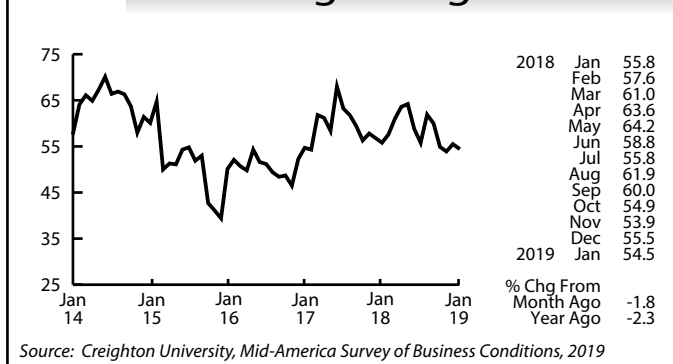
Wage and Salary Employment



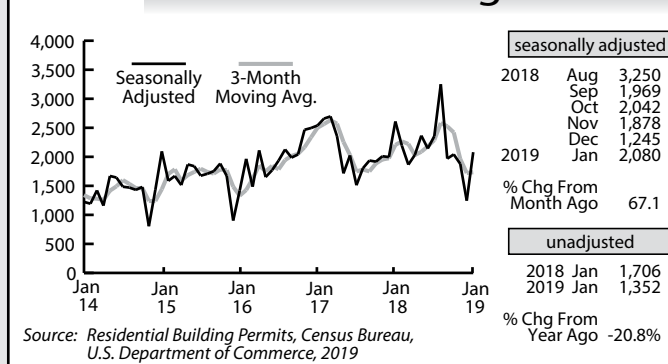
Minnesota Leading Index



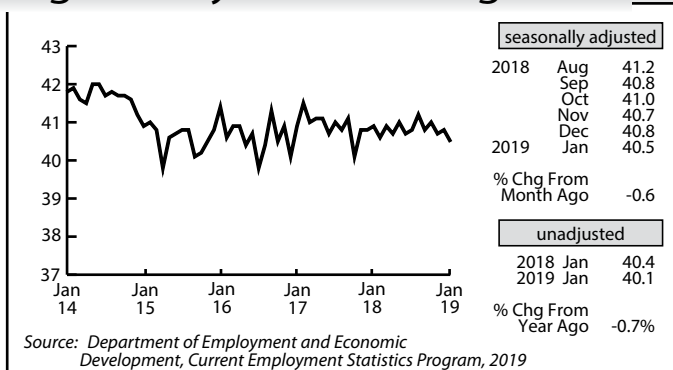
Purchasing Managers' Index



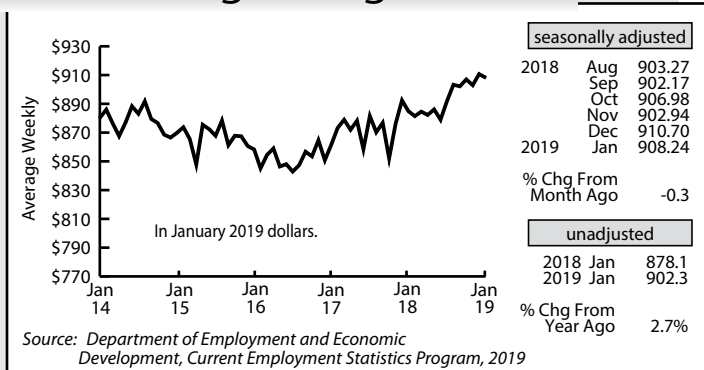
Residential Building Permits



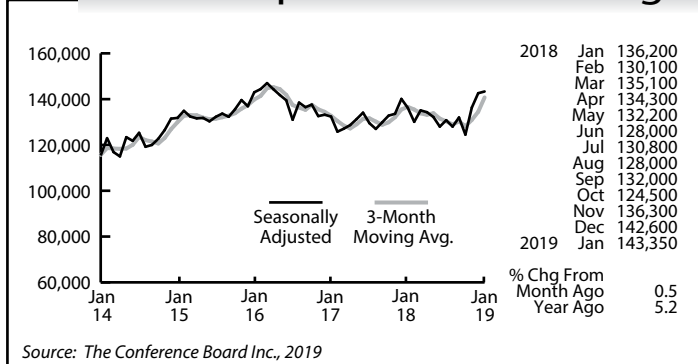
Average Weekly Manufacturing Hours



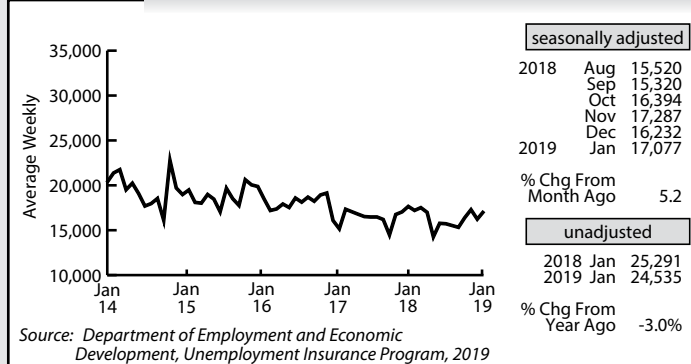
Manufacturing Earnings



Online Help-Wanted Advertising



Initial UB Claimants



Review

Minnesota Employment



DEED

Labor Market Information Office

1st National Bank Building
332 Minnesota Street, Suite E200
St. Paul, MN 55101-1351
651.259.7400 (voice)
1.888.234.1114 (toll free)
651.296.3900 (TTY)
1.800.657.3973 (TTY toll free)
e-mail :
DEED.Imi@state.mn.us
Internet :
mn.gov/deed/Imi

Labor Market Information

Help Line:

651.259.7384

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in alternative formats.

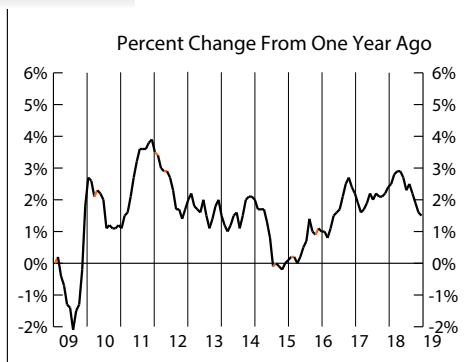
PRE-SORTED
FIRST-CLASS MAIL
POSTAGE & FEES
PAID
PERMIT NO. 8717

U.S. Consumer Price Index for All Urban Consumers (CPI-U)

The Consumer Price Index for All Urban Consumers (CPI-U) was unchanged in January on a seasonally adjusted basis the U.S. Bureau of Labor Statistics reported. The energy index declined for the third consecutive month, offsetting increases in the indices for all items less food and energy and for food.

The all items index increased 1.6 percent for the 12 months ending January, the smallest increase since the period ending June 2017.

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What's Going On?

A County Abecedarium

Employment Review first began publishing economic profiles of Minnesota counties in April 2017 with Aitkin, Anoka, Becker, and Beltrami and concluding in January 2019 with Winona, Wright, and Yellow Medicine. LMI analysts looked at each county's history, trends, and top employing industries – and had a lot of fun doing it. County Snapshots will be archived for a year. If you missed a county along the way, here's your chance.

Website: mn.gov/deed/newscenter/publications/review/county-snapshots-wrapup/

The employment and unemployment data in this publication were produced in cooperation with the Bureau of Labor Statistics, U.S. Department of Labor.
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Where Does All of Minnesota's Income Come From?

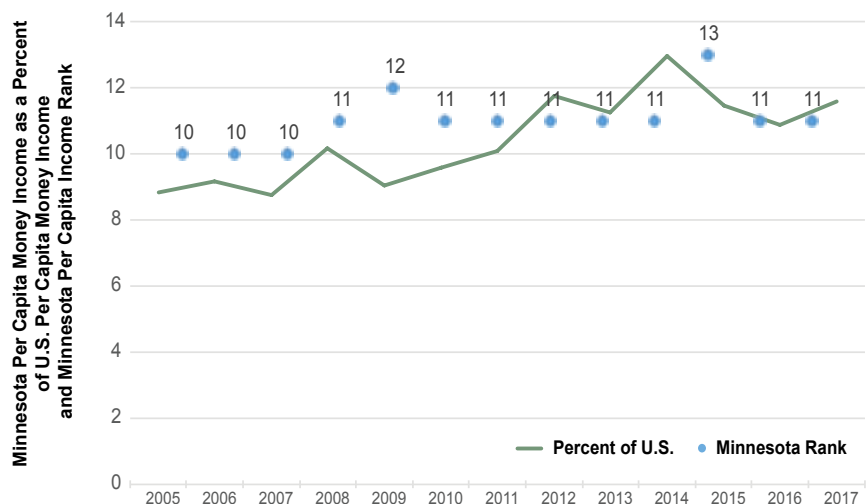
Minnesota's share of U.S. money income, as measured by the American Community Survey (ACS), increased for the first time in three years in 2017. The increase was small but kept Minnesota ranked 11th in per capita money income and lifted Minnesota's per capita money income to 11.6 percent higher than the U.S. average (see Figure 1). Money income data, available since 2005, is one of two measures of income that are commonly used in tracking the relative economic performance among states (see the Measures of Income sidebar on page 2).

The ACS money income data are based on household surveys and not administration records, such as income tax and unemployment insurance records. Instead data are collected via the American Community Survey which ask roughly 65,000 Minnesota households each year about their total income over the past 12 months and about the sources of their income.

The estimated aggregated money income of Minnesotans in 2017, as estimated by the ACS, was \$196.6 billion, putting the state 18th highest among states even though the state ranked only 22nd in population. Minnesota's total money income topped Indiana, Tennessee, Missouri, and Wisconsin all which have more residents than Minnesota. Minnesota's share of U.S. money income in 2017 remained higher than its share of population, resulting in an estimated per capita money income of \$36,160 compared to the U.S. estimate of \$32,400.



Figure 1. Minnesota Per Capita Money Income as a Percent of U.S. Per Capita Money Income and Minnesota's Per Capita Income Rank



Source: American Community Survey (ACS) 2005-2017

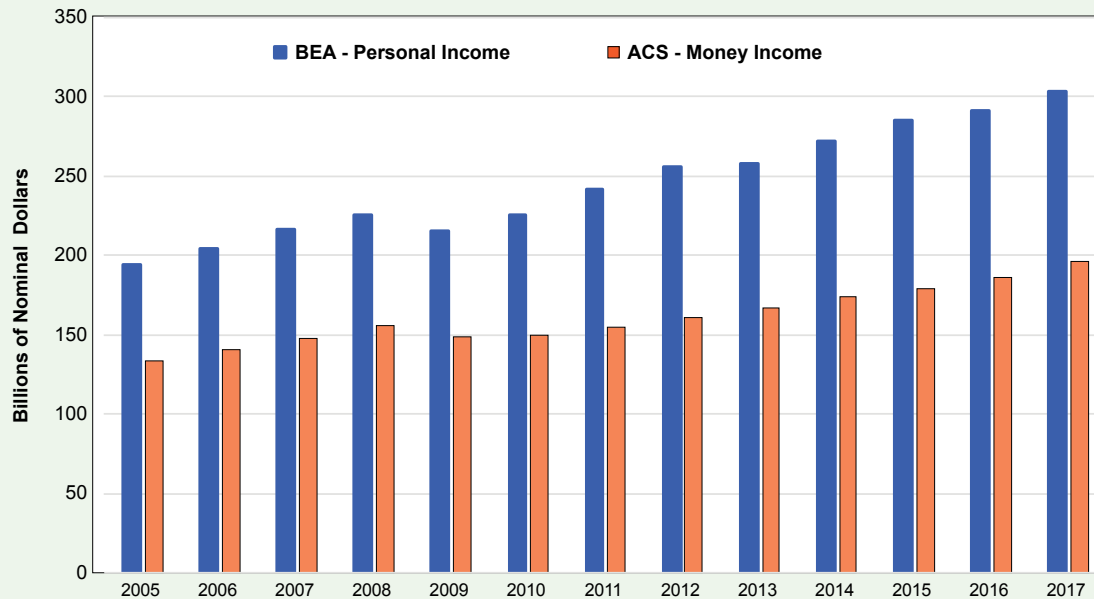
Measures of Income

Two of the most widely used measures of household income are U.S. Census Bureau's money income and Bureau of Economic Analysis's (BEA) personal income. Money income estimates published by the Census Bureau are compiled from surveying households via the Current Population Survey and the American Community Survey. Money income estimates are available for the U.S., states, metropolitan areas, counties, and sub-county areas and across demographic characteristics such as age and ethnicity. Personal income estimates are compiled largely from administrative data sources, such as tax returns and unemployment tax records, by the BEA and are available only for the U.S., states, metropolitan areas, and counties.

Personal income has its roots in the National Income and Product Accounting (NIPA) system designed to produce Gross Domestic Product (GDP) estimates. The NIPA system uses a double-entry accounting systems to estimate the value of output and the income received in the production of the output. The level of aggregation is high since the main goal is to produce statistics summarizing a limited number of national economic statistics. Money income has its roots in tracking income distribution which means that data are less aggregated since the overall purpose is to compare income levels across households. The two measures also differ in individuals covered and income items included. The net result is that the two widely used income measures give substantially different estimates.

Personal income in 2017 in Minnesota was estimated at \$301.1 billion or roughly 54 percent higher than the money income estimate of \$ 196.6 billion (see Chart 1). The difference between the two estimates has fluctuated with Minnesota personal income being 45 percent higher in 2005 to 59 percent higher in 2015. Personal income is higher than money income in part because personal income includes property income (dividends, interests, and rents) received by pensions and non-profit institutions serving households. Employer contributions for employee pensions and insurance funds (including health insurance) are included in personal income but not counted in money income. Another large source of the difference is that most non-cash transfer payments, such as Medicare, Medicaid, and SNAP, are part of personal income but excluded from money income.

Chart 1. Two Estimates of Income in Minnesota



Source: Bureau of Economic Analysis (BEA) - <https://apps.bea.gov/itable/itable.cfm?ReqID=70&step=1>. American Community Survey (ACS) - Table B1905 - <https://factfinder.census.gov/faces/nav/jsf/pages/searchresults.xhtml?refresh=t>

Another difference is that the BEA adjusts self-employment income upwards to account for underreporting of income in proprietors' tax returns. Thus proprietors' income total in personal income is significantly higher than self-employed income reported in money income. Personal income also includes net rental income of owner-occupied dwellings. In other words, personal income includes an estimate of the rent that would be collected if owners were renting out the house they lived in. Some types of income that are excluded from personal income are included in money income with the biggest type being individuals' contributions to social insurance (FICA taxes).

Even though personal income and money income in Minnesota differs significantly, the state's rank was the same, 18th, for both income measures (see Chart 2). What differs is when per capita income is compared. Per capita personal income in Minnesota in 2017 was \$54,360 while per capita money income was \$36,400. Per capita income using personal income in Minnesota was only 5.3 percent higher than the U.S. but was 11.6 percent higher using money income. Knowing why personal income and money income estimates differ is key to understanding Minnesota's relative economic position.

**Chart 2. Minnesota Income Rank
BEA Personal Income vs. ACS Money Income**

		BEA Personal Income		ACS Money Income	Ratio of Personal Income to Money Income
	U.S.	16,820.3	U.S.	10,148.3	65.7
Rank	State	\$ Billions	State	\$ Billions	
1	CA	2,364.1	CA	1,323.4	78.6
2	TX	1,340.6	TX	796.5	68.3
3	NY	1,281.1	NY	709.4	80.6
4	FL	1,000.6	FL	584.8	71.1
5	IL	693.9	IL	423.9	63.7
6	PA	682.5	PA	405.7	68.2
7	NJ	581.2	NJ	354.5	64.0
8	OH	544.8	OH	342.3	59.2
9	VA	466.7	VA	304.7	53.2
10	MA	463.9	MI	296.5	56.5
11	GA	460.4	GA	296.5	55.3
12	MI	460.3	NC	293.1	57.0
13	NC	454.3	MA	277.8	63.5
14	WA	428.8	WA	267.8	60.1
15	MD	368.3	MD	234.1	57.3
16	CO	306.4	CO	197.8	54.9
17	TN	305.7	AZ	197.7	54.6
18	MN	303.1	MN	196.6	54.2
19	IN	301.0	TN	186.4	61.5
20	AZ	296.6	IN	182.9	62.2

Source: Bureau of Economic Analysis and American Community Survey.

The state's per capita income using ACS money income numbers decline in 2009 and 2010 during the Great Recession even before accounting for inflation (see Figure 2). After adjusting for inflation, real per capita income in Minnesota declined three straight years, 2009 through 2011. Real per capita income in 2011 was 7.4 percent below the 2008 peak or about \$2,600 less. Real per capita money income in Minnesota has been gradually recovering since 2011 and in 2017 was 4.5 percent higher than the 2008 pre-recession peak.

Real per capita income for the U.S. peaked in 2007 and fell four straight years, 2008 – 2011, dropping by 7.8 percent or \$2,444. The rebound of the real per capita income nationwide after the recession lagged behind Minnesota's rebound as real U.S. per capita money income in 2017 was only 2.7 percent higher than the 2007 pre-recession level. Minnesota's per capita money income in 2005, as reported by the ACS, was 8.8 percent above the U.S. level or \$2,780 per person. In 2017 Minnesota's per capita income was 11.6 higher than the nation's or roughly \$3,760 per person higher.

So why was the Minnesota 2017 per capita money income \$3,760 higher than U.S. per capita money income? Did Minnesotans make more money in the stock market, receive more social security, have higher wages, collect more public assistance, or earn more self-employed income than the average American? Part of the answer is provided in the ACS money income data which break down income sources into eight broad categories.

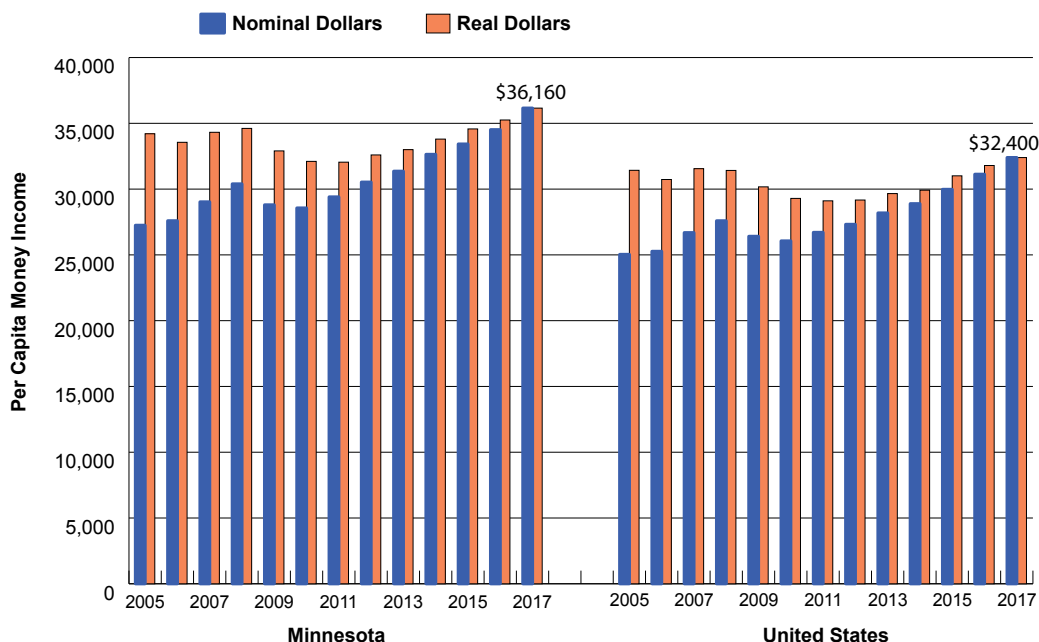
In Minnesota, as in all states, the most important source of income is paychecks. Wage and salary income accounted for 77.3 percent of Minnesotan money income in 2017 as shown in Table 1 (see the Types of Money Income sidebar for details on what income is include in each category). Social security was the second largest income source for Minnesotans, followed by investment, dividends, and net rental income, self-employment income, and then retirement income. The other three sources of income provide a small proportion of income, accounting for roughly 2 percent of total money income when combined.

The sources of household money income in Minnesota don't differ all that much from where households across the U.S. earn their income. The one noticeable difference is that Minnesota households receive more of their income via wage and salary income than U.S. households. Wage and salary income accounted for 77.3 percent of Minnesota money income in 2017 compared to the U.S. 74.8 percent. Minnesota's percent of money income from other major sources a slightly less than nationwide.

Minnesota ranked seventh highest in the share of state total income accounted for by wage and salary income in 2017. The average wage and salary employee in Minnesota made roughly 3 percent more than the national average wage and salary employee in 2017 (see Measures of Wages sidebar). The higher wages would account for most of the higher share of wage and salary money income in Minnesota if a number of factors were constant across states.

But factors such as age structure, hours worked, labor force participation, and unemployment

Figure 2. Minnesota and U.S. Per Capita Money Income (Nominal and Real), 2005-2017



Source: American Community Survey (ACS), 2005-2017, Table B19025. Inflation adjusted using Current Price Index for All Urban Consumers: All Items.

**Table 1. 2017 Aggregate Minnesota Money Income in the Past 12 Months
(in 2017 billions Dollars)**

Income Source	Minnesota	Minnesota	U.S.
		Percent of Total	Percent of Total
Total Money Income	\$196.6		
Wage or Salary Income	151.9	77.3	74.8
Social Security Income	12.7	6.5	7.0
Interest, Dividends, Net Rental Income	9.8	5.0	5.2
Self-Employment Income	9.2	4.7	4.8
Retirement Income	9.1	4.6	5.9
All Other Types of Income	2.8	1.4	1.5
Supplemental Security Income	0.9	0.5	0.6
Public Assistance Income	0.2	0.1	0.1

Source: American Community Survey, 2017

Types of Income Included in ACS Income Estimates

The eight types of income reported in ACS are defined as:

Wage or Salary Income: Total money earnings received for work as an employee. Includes wages, salary, commissions, tips, and cash bonuses earned before any deductions.

Self-Employment Income: Net money income (gross receipts minus operation expenses) for individuals operating a farm as an owner, renter, or sharecropper. Net money income (gross receipts minus operation expenses) from one's own business, professional enterprise, or partnership.

Interest, Dividends, Net Rental Income: Interest on savings or bonds, dividends from stockholdings, and net income from rental of property to others. Does not include realized capital gains.

Social Security Income: Social Security pensions and survivor benefits, prior to deductions for medical insurance, and railroad retirement insurance checks from U.S. government. Medical reimbursements are not included.

Public Assistance Income: General Assistance and Temporary Assistance to Needy Families (TANF). Does not include noncash benefits such as SNAP payments, energy assistance, or Medicaid or Medicare reimbursements.

Retirement Income: Retirement income from company pension, union pension, government pension, military pension, and U.S. Railroad pension. Retirement income from KEOGH plan, Simplified Employee Pension (SEP), and any other type of pension, retirement account, or annuity such as IRA, ROTH IRA, 401(k), or 403(b) account.

Supplemental Security Income: Survivor income which is paid to spouses or children of deceased persons or regular income from a disability pension paid to those unable to work due to disability from companies or unions; federal, state, or local governments; and the U.S. military. Does not include Social Security payments.

All Other Types of Income: Includes unemployment compensation, worker's compensation, Veterans Affairs (VA) payment, alimony, and child support. Includes total money earnings received for work as an employee. Includes wages, salary, commissions, tips, and cash bonuses earned before any deductions.

Source: American Community Survey and Puerto Rico Community Survey 2015 Subject Definitions, page 80. https://www2.census.gov/programs-surveys/acs/tech_docs/subject_definitions/2015_ACSSubjectDefinitions.pdf

Measures of Wages

Three of the main programs for tracking employment numbers in Minnesota also provide wage estimates in various forms and using differing sources. Each wage estimate has its own strengths and limitations.¹ In addition to the wage data from the three main programs (Quarterly Census of Employment and Wages (QCEW), Current Employment Statistics (CES), and Occupational Employment Statistics (OES), earnings data from the American Community Survey (ACS) and wage and salary data from the Bureau of Economic Analysis (BEA) are also available. Average and median wage data for the U.S. and Minnesota from the above sources are listed in Table 1 for 2017.

Table 1. Relative 2017 Wage and Salary, Minnesota and U.S.

	United States	Minnesota	Minnesota Relative to U.S.
2017 ACS Wage and Salary Worker Average Annual Earnings	52,209	54,148	3.7
2017 ACS Full-time Year Workers Average Earnings	64,010	67,778	5.9
2017 ACS Full-time Year Workers Median Earnings	46,881	51,221	9.3
2017 ACS All Workers Median Earnings	33,646	37,397	11.1
2017 BEA Average Annual Wage and Salary	55,643	55,310	-0.6
2017 CES Average Weekly Earnings	906	969	6.9
2017 OES Average Annual Wage and Salary	50,620	52,730	4.2
2017 OES Median Annual Wage and Salary	37,690	41,260	9.5
2017 QCEW Average Annual Wage and Salary	55,390	56,140	1.4

Source:

ACS - <https://factfinder.census.gov/faces/nav/jsf/pages/searchresults.xhtml?refresh=t#none>

CES - <https://mn.gov/deed/data/data-tools/current-employment-statistics/>

BEA - <https://apps.bea.gov/itable/iTable.cfm?ReqID=70&step=1>

OES - <https://mn.gov/deed/data/data-tools/oes/>

QCEW - <https://mn.gov/deed/data/data-tools/qcew/>

Minnesota's median wage and salary in 2017 ranges from 9.3 to 11.1 percent higher than the U.S. median wage while the state's average wage and salary ranges from 0.6 percent lower to 6.9 percent higher in Table 1.

¹For more information on the various wage estimates see , Reviewing the Data, From A to Z, Minnesota Economic Trends, September 2016 - mn.gov/deed/assets/Reviewing%20the%20Data_tcm1045-257088.pdf.

rates vary across states. Minnesota has roughly the same age structure as the U.S. but has a higher labor force participation and a lower unemployment rate than the nation. That means that a larger share of working-age Minnesotans are working and earning paychecks when compared to the rest of the country. This increases Minnesota's wage and salary money income share. The share is reduced slightly, however, by Minnesota's

shorter workweek. Private sector employees in Minnesota worked an average of 34.1 hours each week in 2017 compared to 34.4 percent across the U.S.

Table 2 lists Minnesota's ranking in terms of each income category's share of state income for the six highest income sources. Minnesota's rank is listed along with the top and bottom three states and the U.S. average share². State rankings

when examined closely reveal a lot about the variation of state economies. For instances, Montana, New Mexico, and Florida are ranked at the bottom when it comes to wage and salary income as percent of total state income. New Mexico and Florida are in the top 10 when it comes to reliance on social security and retirement income. These states have a relatively older population and thus a higher percentage of their population is senior citizens

²ACS income data for total income and the eight income categories by state for 2005 – 2017 are shown graphically using four views: actual income, percent of state total income, share of U.S. income, and per capita income at <https://public.tableau.com/profile/magda.olson#!/vizhome/SourcesofHouseholdIncomebyState/Sheet1>.

living on social security and retirement income and less active in the workforce.

Montana on the other hand, along with North and South Dakota, is one of the leading states when it comes to self-employment income. Higher self-employment income shares of total state income tend to correlate with states where agriculture is a dominant industry. Alaska ranks near the top most years for share of money income coming from other types of income primarily because of the Alaskan Permanent Fund. If you know any Alaskans, you know how they eagerly await their annual Permanent Fund dividend. The

annual Permanent Fund payout, however, fell to \$1,100 in 2017 from \$2,000 in 2015, pushing Alaskan's percent of income from other types of income down to sixth highest in 2017.

Tracking different income categories over time is a useful exercise in understanding how state economies are changing especially relative to each other. Eight states (Alabama, Connecticut, Delaware, Florida, Georgia, Michigan, Nevada, and New Mexico) had lower real per capita money income in 2017 than in 2005. North Dakota, thanks to the oil boom, led real per capita income growth, increasing 17.2 percent to

\$34,040 in 2017 over the 12-year period. D.C. and Washington were next in line increasing 11.3 and 10.4 percent. Real per capita money income increased 5.7 percent in Minnesota during the same period, which was the 15th fastest increase. Real per capita money income climbed 7.5 percent (7th fastest) to \$29,610 in South Dakota. Iowa's real per capita money income increased 5.3 percent (16th fastest) to \$30,870, while Wisconsin's real per capita money income grew 2.9 percent (28th fastest) to \$32,000. U.S. real per capita income rose 3.1 percent to \$32,400 over the same period.

Table 3 compares the Minnesota

Table 2. 2017 State Ranking of Share of State Total Income by Income Sources

Wage and Salary Share		Percent		Social Security		Percent
1	District of Columbia	80.9	1	West Virginia		13.1
2	Utah	78.7	2	Arkansas		10.4
3	New Jersey	78.7	3	Alabama		10.3
7	Minnesota	77.3		U.S. Average		7.0
	U.S. Average	74.8	36	Minnesota		6.5
49	Florida	68.4	49	California		5.0
50	New Mexico	67.8	50	Alaska		4.3
51	Montana	67.1	51	District of Columbia		2.7
Interest, Dividends, or Net Rental		Percent		Self-Employment		Percent
1	Montana	7.8	1	North Dakota		9.3
2	Florida	7.6	2	South Dakota		7.9
3	Vermont	7.4	3	Montana		7.1
	U.S. Average	5.2		U.S. Average		4.8
26	Minnesota	5.0	27	Minnesota		4.7
49	Georgia	3.8	49	Indiana		3.8
50	Louisiana	3.7	50	Virginia		3.8
51	West Virginia	3.5	51	West Virginia		3.3
Retirement		Percent		Other Types of Income		Percent
1	New Mexico	9.6	1	Oklahoma		2.4
2	Delaware	8.9	2	New Mexico		2.3
3	West Virginia	8.0	3	West Virginia		2.3
	U.S. Average	5.9		U.S. Average		1.5
48	Minnesota	4.6	40	Minnesota		1.4
49	Texas	4.5	49	Massachusetts		1.2
50	Nebraska	4.2	50	New York		1.1
51	North Dakota	3.0	51	District of Columbia		0.7

Source: American Community Survey, 2017

and U.S. real money income growth changes between 2005 and 2017. Minnesota's slightly higher than U.S. total money income growth combined with its lower than U.S. population growth translates into Minnesota's per capita money income premium relative to the nation, climbing from 8.4 percent above in 2005 to 11.6 percent above in 2017 (see Figure 1). The 11.6 percent higher per capita money income is down from the 13.0 percent peak in 2014. Minnesota and U.S. changes across the eight categories of money income are fairly similar except for supplemental security income and public assistance income. Both of these sources of income have climbed at a faster rate in Minnesota than nationally. This is probably because Minnesota added more aid to these predominantly federally funded programs than most other states.

Figure 3 displays how money income sources for Minnesota households have ebbed and flowed over the last 13 years using the share of state income measure. The share of wage and salary income isn't shown, given its overwhelming share of money income, but it has increased over the last two years as unemployment rates have continued to decline. More people working means more income received from wages and salaries. The share of income arising from wage and salary income is expected, however, to tail off gradually over the next two decades as the baby boomers complete their working years and move to depending on Social Security and other retirement money to pay their bills.

Social Security income and retirement income had been gaining in importance in Minnesota especially from the end of the Great Recession until 2017. The dips in 2017 probably reflect the tight labor market. As Minnesota baby boomers continue to retire, Social Security income and retirement income are expected to resume gradually increasing as money income sources. That will happen only if the baby boomers retire in Minnesota rather than

Florida or Arizona. Social Security and retirement income accounted for 17 and 16 percent of all money income in Florida and Arizona in 2017 compared to 13 percent for the U.S. and 11 percent in Minnesota. Minnesota's percent of money income generated by Social Security and retirement income is likely to reach the current percentages in Florida and Arizona by 2030.

Tracking annual changes in ACS estimates of Minnesota households, especially relative to other states, is another tool to help in understanding

the forces driving the Minnesota economy and the state's economic performance relative to the nation and other states. Minnesota, based on ACS money income data, took a slightly smaller hit from the Great Recession, put the recession in the rearview mirror faster than most states initially, and has been keeping up with national growth rate over the last few years when money income is used as a barometer.

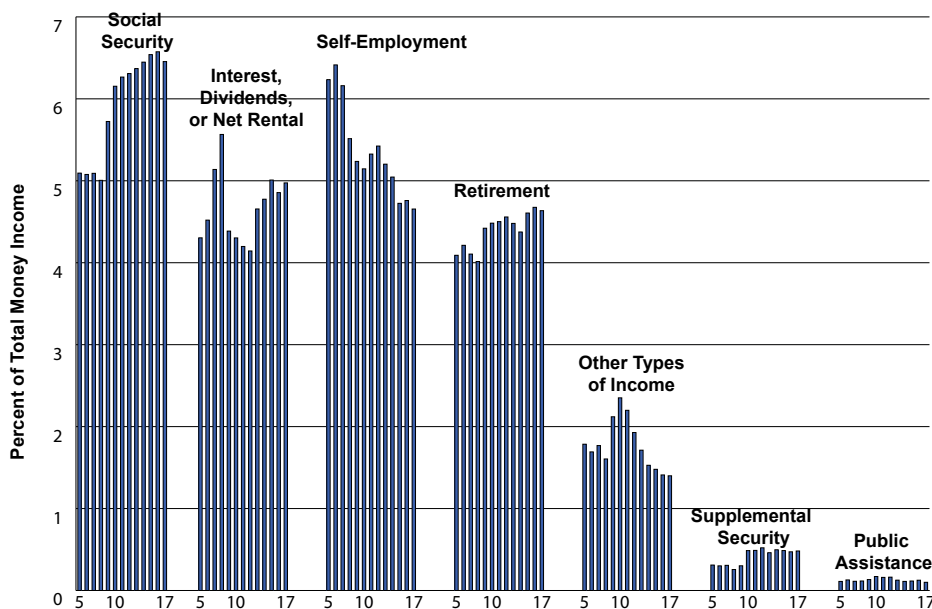
by Dave Senf

Table 3. Percent Change in Real Money Income Sources 2005-2017

	Minnesota	U.S.
Total Money Income	17.2	16.3
Wage or Salary Income	16.0	15.2
Social Security Income	48.5	43.6
Retirement Income	32.8	34.9
Interest, Dividends, Net Rental Income	35.5	25.1
Self-Employment Income	-12.5	-12.3
All Other Types of Income	-8.1	-4.6
Supplemental Security Income	82.0	57.0
Public Assistance Income	5.8	-22.0
Population	11.8	12.9

Source: American Community Survey, 2005 and 2017

Figure 3. Minnesota Income by Source, 2005-2017 (Percent of Total Minnesota Money Income)



Source: Bureau of Economic Analysis and American Community Survey.

Having a Senior Moment

When people start talking about “seniors” and their job prospects in the spring, typically they are referencing students who have reached the 12th grade in school – usually 17, 18, or 19 year olds. These seniors are facing the end of their high school experience, with adulthood right around the corner, so many of these seniors are often asked: “What are you going to do with your life?” The focus is usually on what these youngsters plan to do for a career once they graduate.

However, “seniors” can also refer to a very different stage of life, but since there’s no official age designation, the second group is harder to pin down. Defined in Merriam-Webster’s Dictionary as “an elderly person, especially one who has retired,” “senior citizen” is a common term for people who have reached retirement age. Traditionally, the full benefit age for receiving Social Security retirement benefits was 65, but a 1983 amendment to the law raised the retirement age for full benefits to 67 for people born in 1960 or later.¹ Beyond that, AARP now offers membership to people aged 50 years and older, making the definition of a senior citizen pretty broad.

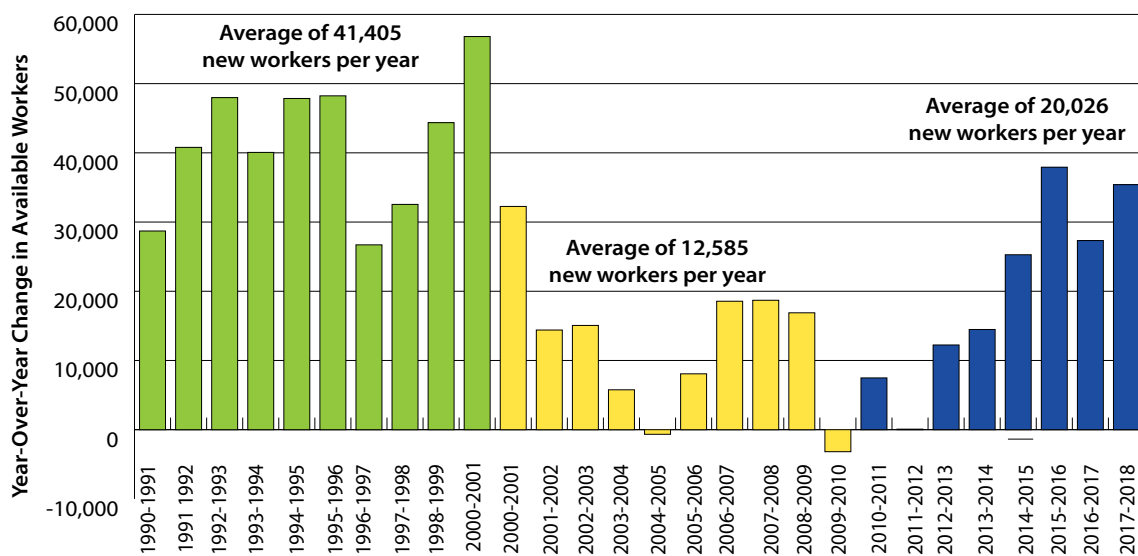
Whatever the exact age, it used to be that this group of

seniors were facing the end of their working careers. Ironically, people would also ask them what they were planning to do with their lives, but it usually no longer involved a job. With rising life expectancies and on-going financial needs, that has changed – it is much more likely that a senior citizen will continue working. To that end, both of these groups of “seniors” will have a big impact on Minnesota’s labor market and economy in the next couple of decades.

Tight Labor Markets

The future plans and job prospects for both groups of seniors have become much more important as Minnesota’s labor force growth has slowed over the past three decades, dropping from an average of 41,405 new workers per year from 1990 to 2000 to an average of 12,585 new workers per year from 2000 to 2010, then rising again to just over 20,000 new workers per year so far this decade. While labor force growth was slow from 2010 to 2014, the state has added more than 25,000 workers each of the past four years, including more than 35,000 workers in both 2016 and 2018 as the strong economy has pulled more workers into the labor force (see Figure 1).

Figure 1. Minnesota’s Annual Change in Labor Force, 1990-2018



Source: DEED Local Area Unemployment Statistics (LAUS)

¹Social Security Administration. Retrieved from <https://www.ssa.gov/planners/retire/retirechart.html>



Like Two Ships Passing in the Night

In the past Minnesota’s labor pool deepened with a steady stream of new workers from several factors including population growth and in-migration, high and rising labor force participation rates for females, and a stable flow of high school seniors graduating into the workforce. All of these are important sources of labor force growth, but the latter is the focus of this article.

Based on numbers, there were always far more 12th graders than there were people turning 65, contributing to the state’s rapid and enviable gain of more than 700,000 net new workers from 1980 to 2000, a 33.6 percent growth rate. According to the 1980 Census, there were 1,030,159 school-aged children, 5 to 19 years old, in the state, which was more than double the number, 507,394, of 55 to 69 year olds. At the time, there were about 74,500 students in 12th grade, but likely less than 30,000 65 year olds.

Unfortunately, these may be temporary gains – the state’s workforce is projected to expand even more slowly in the future. Labor force projections for 2020 to 2030 from the Minnesota State Demographic Center range from about 55,000 new workers to an estimate of just under 75,000 new workers from the author’s calculation combining current participation rates by age group with population projections by age group (see Table 1). Either way, that would mean annual labor force growth of only 5,500 to 7,500 additional workers per year, at best just one-fifth of the rate experienced during the 1990s and, at worst, less than half the slowest growth experienced during the 2000s.

During the 2000 Census there were approximately 31,300 people age 65 years old in the state compared to about 67,000 12th graders, meaning there were still more than twice as many people ready to enter the labor force as there were potentially ready to leave it. In 2017 there were 74,994 12th graders compared to 57,079 67 year olds, a gap of 17,915 more students than prospective retirees (see Table 2). While that means there were still more people potentially ready to join the labor market than leave it, the gap was clearly narrowing. Fast forward to the other end of Table 2, and the significance of the shifting demographic wave becomes obvious.

Table 1. Minnesota Labor Force Projections, 2020-2030

	2020 Labor Force Projection	2030 Labor Force Projection	2020-2030	
			Numeric Change	Percent Change
16 to 19 years	169,642	167,530	-2,112	-1.2%
20 to 24 years	342,326	378,558	36,232	10.6%
25 to 44 years	1,234,214	1,290,510	56,296	4.6%
45 to 54 years	602,222	611,017	8,794	1.5%
55 to 64 years	560,791	489,812	-70,979	-12.7%
65 to 74 years	157,518	193,484	35,966	22.8%
75 years and over	24,211	34,278	10,068	41.6%
Total Labor Force	3,090,925	3,165,190	74,265	2.4%

Source: calculated from Minnesota State Demographic Center population projections and 2013-2017 American Community Survey 5-Year Estimates

Table 2. Minnesota Population by Age and Student Enrollment by Grade Counts, 2017

Grade	Number	Age	Number	Number of Students Compared to Adults
Kindergarten	71,769	55 years	79,370	-7,601
1st grade	70,629	56 years	81,026	-10,397
2nd grade	71,529	57 years	81,384	-9,855
3rd grade	72,635	58 years	78,143	-5,508
4th grade	74,275	59 years	77,247	-2,972
5th grade	74,584	60 years	75,558	-974
6th grade	73,507	61 years	72,083	1,424
7th grade	72,196	62 years	70,843	1,353
8th grade	72,425	63 years	68,026	4,399
9th grade	71,419	64 years	65,348	6,071
10th grade	70,301	65 years	63,194	7,107
11th grade	71,097	66 years	59,983	11,114
12th grade	74,994	67 years	57,079	17,915
All Grades	964,052	55-67 years	929,284	34,768

Source: Minnesota Dept. of Education, U.S. Census Bureau

According to the Minnesota Department of Education’s student enrollment data, there were 71,769 kindergarten students in Minnesota in 2017-2018, compared to 79,370 people aged 55 years according to the Census Bureau. A lot can change for both of those populations over the course of 12 years, but if nothing does, that would leave a deficit of 7,600 more people reaching retirement age than graduating from high school.

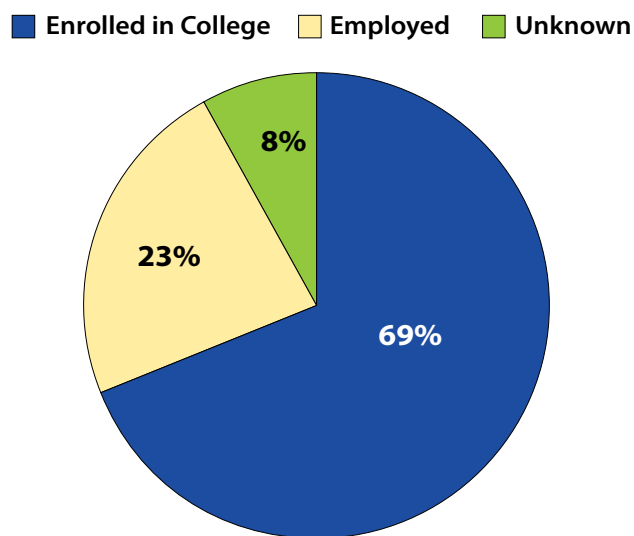
The tipping point actually occurs with 2017-2018’s 5th grade class – they are slightly outnumbered by 60 year olds, and the imbalance between students and adults grows in younger grade levels. Both the 1st and 2nd grade have deficits of around 10,000 people compared to the 56 and 57 year old age cohorts, which both number over 81,000 people in 2017 (see Table 2).

As shown in Table 2, grade level enrollments are relatively consistent over time, ranging between 70,000 and 75,000 students each year for the next 13 years. In contrast, the difference between the growing number of 55 to 60 year olds compared to the smaller number of 64 to 67 year olds is substantial, again demonstrating that much of the labor force shift comes from the aging population.

Cradle to Career

Almost 70 percent of Minnesota high school graduates immediately enroll in post-secondary education after

Figure 2. Outcomes for Minnesota Graduates, 2016



Source: Minnesota SLEDS

their senior year, often delaying their entrance to the workforce (see Figure 2). Another 23 percent find jobs and start their careers, while outcomes for the other 8 percent are unknown because of data limitations with Minnesota’s Statewide Longitudinal Education Data System. SLEDS matches student data from pre-kindergarten through completion of postsecondary education and into the workforce, providing a detailed look at labor market outcomes for students.²

²Minnesota Statewide Longitudinal Education Data System. Retrieved from: <http://sleds.mn.gov/>



The “Entering the Workforce” report from SLEDS shows the number and percent of graduates who enrolled in post-secondary education in the fall after graduation and those who did not enroll but instead found employment. It is important to note that graduates could be enrolled in college in Minnesota or out of state, whereas employed graduates are only those found working in Minnesota a year after graduation. Graduates not found to be enrolled or working in Minnesota are included in the unknown count.

Further details show that over half of the graduates who went to work were working less than 20 hours per week, compared to 31 percent who were working 30 hours or more per week. By industry, the largest number of high school graduates went to work in Trade, Transportation, and Utilities – primarily in Retail Trade, followed closely by Leisure and Hospitality. Graduates earned the highest wages in Construction, Natural Resources, and Manufacturing (see Table 3).

Getting Prepared

For both sets of seniors a high school diploma has been the basic foundation to start building a career. For almost half (46.8%) of Minnesotans aged 65 years and over a high school diploma is the highest level of education ever attained, and many of these senior citizens can look back on successful careers in a wide variety of industries. Depending on their financial situation and work interests, they may need or want to continue using their skills in the workplace.

Likewise, 23 percent of current high school seniors are going straight to work, and they are being desperately sought out by employers who are looking for applicants to fill their available jobs.

Indeed, the question for both groups of seniors is: what jobs are they prepared to fill, and do the graduating seniors have the basic skills to start climbing the career ladder and replace the outgoing seniors? As the labor market tightens in the future, we can definitely say that only time will tell.

by Cameron Macht

Table 3. Minnesota Graduates by Industry of Employment, 2016

Industry	Percent	Average Hourly Wage
Trade, Transportation, and Utilities	30.0%	\$11.49
Leisure and Hospitality	25.0%	\$11.27
Educational and Health Services	13.0%	\$11.99
Professional and Business Services	11.0%	\$12.42
Construction	6.0%	\$16.32
Manufacturing	6.0%	\$13.26
Other Services	4.0%	\$11.34
Financial Activities	2.0%	\$12.87
Information	1.0%	\$12.29
Natural Resources and Mining	1.0%	\$13.28
Public Administration	1.0%	\$11.11

Source: Minnesota SLEDS

Minnesota Industry Snapshot

NAICS 721

Accommodation

Another new year for Employment Review presents another new series of analysis. Where Employment Review previously analyzed occupations by the alphabet and then moved on to county snapshots, it's time to highlight industries within the State of Minnesota. More specifically, Employment Review will be digging into the three-digit North American Industrial Classification System (NAICS) codes, alphabetically, of course. At this level, there are just about 100 industries to cover, although some will be left out because of their extremely low employment levels in Minnesota. First in line: Accommodation.

Accommodation (NAICS 721)

Traveling around the State of Minnesota? Looking for a place to spend the night? Whether it's in a hotel, motel, casino hotel, bed-and-breakfast, RV (recreational vehicle) park, or rooming and boarding house, these types of establishments are housed (pun intended) within the Accommodation industry. More specifically, Accommodation includes those specific industries that provide lodging or short-term accommodations for travelers, vacationers, and others.

As of annual 2017, 1,465 establishments supplied just under 35,000 jobs in Accommodation. Top-employing occupations within this industry typically require less education and have lower median wages, but are highly in-demand across the state (see Table 1).

Table 1. Accommodation Top-Employing Occupations

Occupation	Employment	Median Wage	2016-2026 Employment Change	
			Numeric	Percent
Maids and Housekeeping Cleaners	16,310	\$11.96	1,542	8.0%
Hotel, Motel, and Resort Desk Clerks	4,420	\$10.27	368	9.5%
Waiters and Waitresses	50,180	\$10.06	1,269	2.5%
Maintenance and Repair Workers	23,020	\$20.56	1,610	6.9%
Cooks, Restaurant	28,240	\$13.03	1,832	7.2%
Dining Room and Cafeteria Attendants	4,420	\$10.27	133	3.4%
Janitors and Cleaners	45,680	\$13.86	3,986	8.2%
Bartenders	16,490	\$10.01	-152	-0.9%
Gaming Dealers	2,100	\$9.88	112	4.1%
Lodging Managers	530	\$19.65	53	8.7%

Source: BLS Industry-Occupation Matrix, DEED Occupational Employment Statistics (OES), DEED Employment Outlook

While almost half of Accommodation employment within the state is located in the Twin Cities Metro Area, high concentrations are found in Northeast Minnesota and Northwest Minnesota. Where these two regions make up about 13 percent of the state's total employment, they make up about 28 percent of the state's Accommodation employment (see Table 2). After dipping below 31,000 statewide jobs in 2010 during the Great Recession, Accommodation gained nearly 4,000 jobs through 2017. This growth rate of 12.8 percent slightly outpaced the total employment growth of all industries during that period of time and equaled 11.3 percent. Taking a look through the planning regions, you will notice a large spike of Accommodation employment in Central Minnesota. Much of this could be from establishment reporting, more specifically switching from Casinos to Casino Hotels (see Table 2).

Table 2. Accommodation Employment in Minnesota

Area	Number of Firms	Number of Jobs	Share of Minnesota Accommodation	2010-2017 Job Change	Average Annual Wage
Minnesota	1,466	34,942	100.0%	3,966 (12.8%)	\$26,468
Metro Area	353	16,235	46.4%	670 (4.3%)	\$31,772
Northwest MN	402	5,794	16.6%	724 (4.3%)	\$19,292
Central MN	146	4,873	13.9%	3,114 (177.0%)	\$24,232
Northeast MN	268	3,867	11.1%	131 (3.5%)	\$19,656
Southeast MN	159	2,941	8.4%	86 (3.0%)	\$21,060
Southwest MN	100	992	2.8%	-935 (-48.5%)	\$14,612

Source: DEED Quarterly Census of Employment and Wages (QCEW)

Minnesota Industry Snapshot

NAICS 925

Administration of Housing Programs, Urban Planning, and Community Development

With numerous Public Administration industry titles starting off with “Administration of,” this alphabetical run-through of in-depth industry sectors in Minnesota starts off with a heavy look into government employment in the state. This next industry, Administration of Housing Programs, Urban Planning, and Community Development, is broken down into two main areas:

- Administration of Housing Programs: specifically includes building standards agencies, housing authorities, and housing planning and development programs
- Administration of Urban Planning and Community and Rural Development: specifically includes community and county development agencies, land redevelopment agencies, urban planning commissions, zoning boards and commissions, and regional planning and development program administrations

While this month’s industry snapshots take a look at three industries within Public Administration, they are each distinct in how they are distributed amongst the local, state, and federal levels. For example, both Administration of Economic Programs and Administration of Environmental Quality Programs have significant shares of their respective employment within state and federal government. Public Administration as a whole has about one-third of its total employment at the state and federal government levels. Yet only 3.7 percent of Administration of Housing Programs, Urban Planning, and Community Development employment is within state and federal government, equivalent to about 100 jobs (see Table 1). The vast majority of the work done by those in this industry is at the local level.

Table 1. Administration of Housing Programs, Urban Planning, and Community Development Employment in Minnesota, 2017

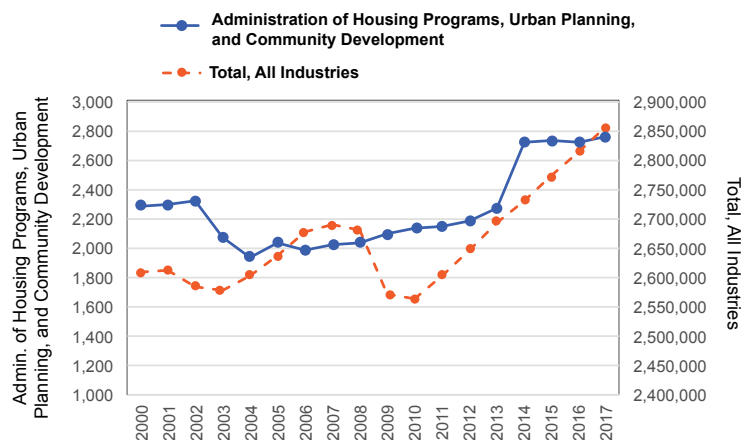
Industry	Number of Firms	Number of Jobs	Federal Government Share	State Government Share	Local Government Share	Average Annual Wage
Total Government Employment	6,831	382,529	8.4%	21.0%	70.6%	\$52,676
Public Administration	3,358	132,054	8.6%	23.4%	68.0%	\$56,264
Admin. Of Housing Programs, Urban Planning, and Community Dev.	118	2,762	3.2%	0.5%	96.3%	\$63,700

Source: DEED Quarterly Census of Employment and Wages (QCEW)

Trends

Between 2002 and 2004, Administration of Housing Programs, Urban Planning, and Community Development lost 387 jobs, contracting by 16.7 percent. Over the next decade, between 2004 and 2014, the industry gradually regained these jobs. A 19.8 percent spike in employment or 449 jobs between 2013 and 2014 especially helped out. As of annual 2017, there were 118 establishments in Administration of Housing Programs, Urban Planning, and Community Development supplying 2,762 jobs. Employment levels between 2014 and 2017 have remained largely stable (see Figure 1). Note that where the Seven-County Metro Area accounts for just over half (53.9 percent) of the state’s total Public Administration employment, the region accounts for 75.7 percent of the state’s total employment in Administration of Housing Programs, Urban Planning, and Community Development.

Figure 1. Administration of Housing Programs, Urban Planning, and Community Development Trends in Minnesota



Minnesota Industry Snapshot

NAICS 926

Administration of Economic Programs

With just over 132,000 jobs, Public Administration includes a number of industries essential to the administration, oversight, and management of public programs at the federal, state, and local levels. One of these specific industries is Administration of Economic Programs. Broken down, this industry includes:

- Administration of General Economic Programs: consumer protection offices, economic development agencies, trade commissions, small business development agencies, and economic statistical agencies
- Regulation and Administration of Transportation Programs: port authorities, public transportation commissions, transportation safety programs, motor carrier licensing and inspection offices, the Federal Aviation Administration, and the Coast Guard
- Regulation and Administration of Communications, Electric, Gas, and Other Utilities: examples include communications commissions, energy development and conservation programs, and licensing and inspecting of utilities
- Regulation of Agricultural Marketing and Commodities: food inspection agencies, pest control programs, and regulation and inspection of agricultural products
- Regulation, Licensing, and Inspection of Miscellaneous Commercial Sectors: alcoholic beverage control boards, banking regulatory agencies, building inspections, hospital licensure agencies, pet licensing, rent control agencies, and occupational safety and health administration

One of the most distinguishing things about Administration of Economic Programs is its much higher share of employment in both federal and state government, as opposed to local government employment. This industry also has higher average annual wages than Public Administration employment or total government employment in the state as a whole (see Table 1).

Table 1. Administration of Economic Programs Employment in Minnesota, 2017

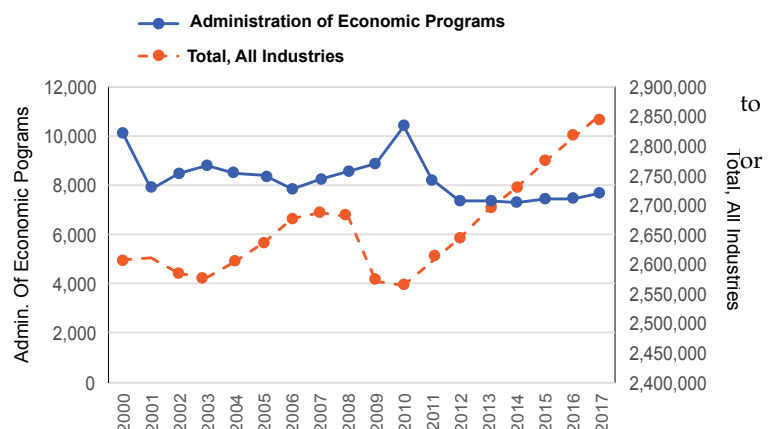
Industry	Number of Firms	Number of Jobs	Federal Government Share	State Government Share	Local Government Share	Average Annual Wage
Total Government Employment	6,831	382,529	8.4%	21.0%	70.6%	\$52,676
Public Administration	3,358	132,054	8.6%	23.4%	68.0%	\$56,264
Administration of Economic Programs	417	7,676	34.4%	49.9%	15.7%	\$60,684

Source: DEED Quarterly Census of Employment and Wages (QCEW)

Trends

Interestingly, where the Great Recession caused total employment in Minnesota to decline by 4.7 percent between 2007 and 2010, equal over 125,000 jobs, Administration of Economic Programs witnessed employment growth of 26.4 percent nearly 2,200 additional jobs. After losing 3,040 jobs between 2010 and 2012, this industry's employment has remained largely unchanged, growing by 4.4 percent between 2012 and 2017 (see Figure 1).

Figure 1. Administration of Economic Programs Employment Trends in Minnesota



Minnesota Industry Snapshot

NAICS 924

Administration of Environmental Quality Programs

Along with Administration of Economic Programs, Administration of Environmental Quality Programs is another defined industry within Public Administration. Broken down, Administration of Environmental Quality Programs includes two main in-depth sectors:

- Administration of Air and Water Resource and Solid Waste Management Programs: very much self-explanatory, this industry includes such things as enforcement of environmental and pollution control agencies, sanitation engineering agencies, water control and quality program administrations, and waste management program administrations.
- Administration of Conservation Programs: this industry comprises establishments across numerous specific areas including wind and water erosion control agencies, wildlife conservation agencies, land management program administrations, fish and game agencies, community recreation programs, and weather forecasting program administrations.

Establishments within Administration of Environmental Quality Programs are essentially responsible for ensuring the environmental security of Minnesota’s land, water, and air, as well as overseeing the conservation of fish and wildlife. As Table 1 highlights, this work is being done at the local, state, and federal levels. Common names for agencies across these levels of government employment include Environmental Quality Board, Farm Service Agency, Fish and Wildlife Office, Land Management Department, Solid Waste Management, Natural Resources Conservation, as well as the Minnesota Department of Natural Resources. Much of the work being done within these agencies and programs is making sure that current and future Minnesotans can enjoy the natural benefits of the state, from bluff country in the southeast to the western prairie grasslands to the northern lakes and rivers.

Table 1. Administration of Environmental Quality Programs Employment in Minnesota, 2017

Industry	Number of Firms	Number of Jobs	Federal Government Share	State Government Share	Local Government Share	Average Annual Wage
Total Government Employment	6,831	382,529	8.4%	21.0%	70.6%	\$52,676
Public Administration	3,358	132,054	8.6%	23.4%	68.0%	\$56,264
Admin. Of Environmental Quality Programs	463	8,243	16.1%	41.6%	42.3%	\$56,836

Source: DEED Quarterly Census of Employment and Wages (QCEW)

Trends

Employment within Administration of Environmental Quality Programs generally trended downwards between the turn of the century and 2010. More specifically, this industry lost 343 jobs during that decade, contracting by 4.0 percent. The industry then experienced some whiplash, losing 441 jobs between 2010 and 2011, before regaining 429 jobs between 2011 and 2012. Since 2012, employment in Administration of Environmental Quality Programs has remained largely stable, growing by 1.4 percent through 2017. For reference, the total of all industries grew by 7.9 percent between 2012 and 2017 (see Figure 1). As of 2017, there were over 8,200 Administration of Environmental Quality Programs jobs in Minnesota at 463 establishments.

Figure 1. Administration of Environmental Quality Programs Trends in Minnesota

