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Veterans in the Twin Cities Metro

In appreciation to those who have served or are currently serving, this month's Employment Review Spotlight will highlight veterans in the Seven-County Metro Area.

The Big Picture

On December 19th the U.S. Census Bureau released its 2018 ACS 5-Year estimates. These estimates allow users to analyze numerous population and demographic topics down to the county, census tract, and block level for geography. As such, we can take a look at veteran status for the Seven-County Metro Area through the lens of population estimates, period of service, age, gender, race and ethnicity, labor force statistics, poverty status, disability status, and more. We can also see how these various measurements have changed over time. Essentially, we can answer that essential question of how are veterans doing in the Metro Area.

A "veteran" in this analysis refers to a person 18 years of age and older who has served for even a short time, but is no longer serving on active duty in the U.S. Army, Navy, Air Force, Marine Corps, Coast Guard, or who served in the U.S. Merchant Marine during World War II. For the ACS, people who served in the National Guard or military Reserves are classified as veterans only if they were ever called or ordered to active duty, not counting the 4-6 months for initial training or yearly summer camps.

According to the latest ACS estimates, there were nearly 145,000 veterans living in the Seven-County Metro Area in 2018. As such, just under half (46.7 percent) of Minnesota's veterans reside in the Metro Area. Broken down by the region's seven counties, nearly two-in-five veterans reside in Hennepin County, with more than 20,000 veterans residing in Dakota, Ramsey, and Anoka counties. Anoka, Dakota, and Washington counties each had more than 7 percent of their respective total populations 18 years and older being veterans (see Table 1).

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Broken down by period of service, the largest share of the Metro Area's veterans served during the Vietnam Era. A nearly identical share of the region's veterans served during the Gulf War between 08/1990 and 08/2001 as those who have served since 09/2001. About one-in-ten of the region's veterans served during the Korean War. Just over 8,000 veterans in the Metro Area served during World War II (see Table 2).

Through the Years

Looking into the numbers, there is no doubt that the Metro Area's veteran population is decreasing. For example, between the 2013 and 2018 ACS 5-year estimates, the veteran population in the Metro Area declined by about 16 percent, over 27,200 veterans. Accounting for over one-third of this declining population, the number of Vietnam Era veterans decreased by nearly 9,300 people between the 2013 and 2018 estimates. With the youngest Vietnam Era veterans now in their 60s, the largest share of veterans in the Metro Area will witness significant shifts to later conflicts today and through the coming decades.

Today there are nearly 14,500 Korean War veterans living in the Metro Area. This population decreased, however, by almost 4,000 people between the 2013 and 2018 ACS estimates. Being older than Vietnam Era servicemen and women, such veterans witnessed the second sharpest decline in numbers over the past decade. The sharpest decline in veteran numbers came from those who served during World War II.

Since 2013 the number of World War II veterans in the Metro Area has declined by nearly 40 percent. 2020 marks the 75th anniversary of the end of World War II, and the youngest veterans of that war are now in their 90s. Similar to Vietnam Era and Korean War veterans, World War II veterans have and will witness significant declines both today and through the next decade as they get older.

While the total number of veterans in the Metro Area has decreased over the past decade, the number of veterans who have served since September 2001 has increased. Currently an estimated 20,761 post-September 2001 veterans reside in the Metro Area, making up one-seventh of the region's total veterans. The number of such veterans increased by 37.0 percent between the 2013 and 2018 ACS 5-year estimates, more than 5,600 veterans.

With such significant shifts in the number and age of veterans, new and on-going questions will inevitably come up around military-to-civilian transition, education and work experience, skills employers are looking for, retirement, assisted living and healthcare, transportation, and questions around the end of life for many veterans. These are questions that individuals, families, communities, businesses, non-profit organizations, foundations, and more will be confronted with.

Quality of Life

Just how are veterans doing in the Seven-County Metro Area? Taking a look into the most recent statistics on median income, poverty, educational attainment, employment status, and disability status, we can begin to answer that very question (see Table 3).

First up, median income: of those nearly 145,000 veterans living in the Metro Area, their median annual income in 2018 was approximately $46,258. This was just over 13 percent

Table 1. Veteran Counts in the Metro Area, 2018

Area	Number of Veterans	Share of Area's Total Population, 18 Years+	Share of Metro Area's Veteran Population
Hennepin County	54,750	5.7%	37.8%
Dakota County	23,229	7.4%	16.0%
Ramsey County	22,891	5.5%	15.8%
Anoka County	20,062	7.6%	13.8%
Washington County	13,654	7.2%	9.4%
Scott County	5,844	5.7%	4.0%
Carver County	4,528	6.2%	3.1%

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates

higher than the median annual income for the total population in the Metro Area, $40,895. It also happened to be just over 13 percent higher than the median annual income for veterans across the State of Minnesota, $40,687. Zooming into the Metro Area, median annual incomes for veterans were highest for those living in Scott County ($51,905) and lowest for those living in Ramsey County ($41,268) and Hennepin County ($42,685).

With a higher annual median income, veterans living in the Metro Area also have a lower poverty rate. As of 2018 the share of veterans living in the Metro Area with income below the poverty level was 4.7 percent. Comparatively, 8.5 percent of the total population in the region had incomes below the poverty level. All is not equal within the region, however. While the share of those veterans living below the poverty level is much lower in Carver County (1.3 percent), Anoka County (2.9 percent), Scott County (2.9 percent), Dakota County (3.3 percent), and Washington County (3.7 percent), it is higher in Hennepin County (6.1 percent) and Ramsey County (5.8 percent).

In terms of educational attainment, veterans living in the Metro Area are much more likely to have completed some college or obtained an Associate's Degree. A much smaller share of veterans go on to obtain a Bachelor's Degree or higher than their nonveteran counterparts in the region. Even so, only about 4 percent of veterans in the Metro Area have less than a high school diploma. This compares to about 7 percent of the total population in the Metro Area having less than a high school diploma. Since 2013, a higher share of veterans have gone on to achieve higher levels of education.

Considering the skills that veterans gain while serving in the military, along with their educational attainment, it is encouraging to see very high labor force participation rates and low unemployment across the Metro Area. It's also encouraging to see that these labor force indicators have trended in positive directions over the past decade. For example, between the 2013 and 2018 ACS 5-year estimates, veteran labor force participation increased from 80.0 percent to 83.8 percent. At the same time, veteran unemployment in the region decreased from 7.3 percent to 3.3 percent. Not all is equal, however, with unemployment for veterans in the Metro Area. While unemployment rates were very low for veterans in

Washington County (1.6 percent) and Carver County (1.8 percent), it was higher for veterans living in Ramsey County (6.6 percent).

After taking a look through median income and poverty status, educational attainment, and labor force statistics, it would seem veterans, as a whole, are doing very well in the Seven-County Metro Area. Median annual income is higher for

Table 2. Veterans by Period of Service, 2018

Subject	Minnesota	Metro Area	2013 – 2018 Metro Area ACS Trends	
			Numeric	Percent
Veteran Population 18 Years and Over	310,097	144,958	-27,234	-15.8%
Gulf War (9/2001 or later) Veterans	40,960	20,761	+5,608	+37.0%
Gulf War (8/1990 to 8/2001) Veterans	42,874	21,071	-3,380	-13.8%
Vietnam Era Veterans	119,658	53,907	-9,287	-14.7%
Korean War Veterans	32,479	14,479	-3,946	-21.4%
World War II Veterans	16,239	8,170	-5,433	-39.9%

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates

veterans than the overall population, poverty rates are lower, labor force participation rates are higher, and unemployment is generally very low. In terms of educational attainment, veterans are less likely than their nonveteran counterparts to have Bachelor's Degrees or higher, but are more likely to have some college or Associate's Degrees. As such, veterans may have to rely more on their skill sets and experience from working in the military to find and secure a career once they have transitioned into the civilian labor market.

While the statistics certainly seem to paint an encouraging picture for veteran's life in the Metro Area, challenges are ever present for many such individuals. Looking into disability statistics reveals one of these major challenges facing many veterans. As of 2018, over 37,400 veterans in the Metro Area reported living with a disability. This accounts for over one-quarter of veterans living in the region. For reference, about one-tenth of the overall population reports living with a disability (see Table 3). The ACS asks about six types of disabilities: hearing difficulty, vision difficulty, cognitive difficulty, ambulatory difficulty, self-care difficulty, and independent living difficulty. Respondents who report anyone of the six disability types are considered to have a disability.

The Metro Area is a large geographic region that includes a lot of people. As we've seen with poverty rates and unemployment, zooming to the county level reveals pockets of higher poverty and higher unemployment. Zooming in even further would reveal even more of these pockets. Ultimately, veterans in the Metro Area are doing well. Challenges are present, and utilizing American Community Survey data can begin to highlight where these challenges may exist so that individuals, families, communities, businesses, non-profit organizations, foundations, and government can begin to confront and resolve them.

by Tim O'Neill

Table 3. Veteran Income, Labor Force, and Educational Attainment in the Metro Area, 2018

Subject	2018 Total Population	2018 Veterans	2013 Veterans
Total Population 18+	2,320,766	144,958	172,192
Median Income	$40,895	$46,258	$43,822
Percent Income below Poverty Level	8.5%	4.7%	4.5%
Educational Attainment for Population 25 Years and Over			
Total Population 25+	2,057,562	143,371	170,359
Less than High School Graduate	136,412 (6.6%)	6,031 (4.2%)	5.0%
High School Graduate or Equivalent	410,799 (20.0%)	36,536 (25.5%)	28.1%
Some College or Associate's Degree	610,888 (29.7%)	53,252 (37.1%)	35.9%
Bachelor's Degree or Higher	899,463 (43.7%)	47,552 (33.2%)	31.0%
Labor Force Statistics for Population 18 to 64 Years			
Total Population 18-64	1,922,011	67,574	95,262
Labor Force Participation Rate	84.9%	83.8%	80.0%
Unemployment Rate	3.4%	3.3%	7.3%
Disability Status			
Total with any Disability	268,953	37,405	39,110
Percent with any Disability	11.8%	26.3%	21.7%

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates

By the Numbers

Export

In the third quarter of 2019 Minnesota exports had dropped 2 percent year over year. Total exports from Minnesota to the world totaled $5.613 billion in third quarter 2019. The top three nations that Minnesota exports to were Canada at $1.2 billion, Mexico at $660 million, and China at $651 million. The three largest export product types from Minnesota are Optics and Medical at $1.17 billion, Machinery at $829 million, and Electrical Equipment at $721 million.[1]

Current Demand Ranking

Registered Nurses have the number one Current Demand Ranking. Their projected 10-year Growth Rate is expected to be 11.1 percent. The Current Demand Rank numbers two, three, and four are Heavy and Tractor-Trailer Truck Drivers, Retail Salespersons, and Personal Care Aids, respectively.[2]

Percentage 65+ Workers

Workers who are 65 years and older made up 4.8 percent of the total workforce in Minnesota in 2018. The largest workforce participation rate for workers 65 year and older is in the Transit and Ground Passenger Transport Industry where they make up 21.3 percent of the industry's employment. The largest employer for workers 65 years and older is Educational Services which employs 14,547 individuals who are 65 years and older.[3]

Cost of Living

The county with the highest cost of living is Isanti County at $62,676 for one parent employed full-time, one parent employed part-time, and one child. The average wages in Isanti County are $41,787. The county with the lowest cost of living is Stevens County at $40,764 for one parent working full-time, one parent working part-time, and one child. The average wages in Stevens County are $27,185.[4]

Hennepin Highest Wages

In the second quarter of 2019 Hennepin County had the highest wages, most establishments, and the most people employed among counties in Minnesota. The average annual wage in Hennepin County was $69,940. Hennepin County currently employs the most people with 938,582 employees and also has the most establishments at 40,297.[5]

The Highest Paying Industries

The highest paying industries in Minnesota in 2018 were Management of Companies and Enterprises at $127,400 annually, Utilities at $108,056 annually, and Finance and Insurance at $106,028 annually.[6]

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[1]Current and Past Data. (2019, December 2). Retrieved from mn.gov/deed/data/export-stats/current-past/.
[2]Occupations In Demand. (n.d.). Retrieved from https://apps.deed.state.mn.us/lmi/oid/Results_9Columns.aspx.
[3]Quarterly Employment Demographics. (2019, November 14). Retrieved from mn.gov/deed/data/data-tools/qed/.
[4]Cost of Living in Minnesota. (2019, November 14). Retrieved from mn.gov/deed/data/data-tools/col/.
[5]Quarterly Census of Employment and Wages (QCEW). (2019, November 14). Retrieved from mn.gov/deed/data/data-tools/qcew/.
[6]Ibid.

by Derek Teed

Labor Force Estimates

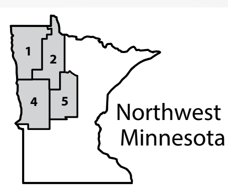
County/Area	Labor Force			Employment			Unemployment			Rate of Unemployment		
	Nov 2019	Oct 2019	Nov 2018	Nov 2019	Oct 2019	Nov 2018	Nov 2019	Oct 2019	Nov 2018	Nov 2019	Oct 2019	Nov 2018
United States ('000s)												
(Seasonally adjusted)	164,404	164,364	162,821	158,593	158,510	156,803	5,811	5,855	6,018	3.5%	3.6%	3.7%
(Unadjusted)	164,386	164,576	162,665	158,945	159,067	157,015	5,441	5,510	5,650	3.3	3.3	3.5
Minnesota												
(Seasonally adjusted)	3,130,509	3,125,415	3,076,964	3,028,714	3,024,595	2,989,124	101,795	100,820	87,840	3.3	3.2	2.9
(Unadjusted)	3,129,485	3,138,147	3,073,359	3,040,087	3,058,277	3,004,071	89,398	79,870	69,288	2.9	2.5	2.3
Metropolitan Statistical Areas (MSA)*												
Mpls.-St. Paul MSA	2,032,283	2,032,710	2,007,352	1,978,126	1,981,218	1,966,410	54,157	51,492	40,942	2.7	2.5	2.0
Duluth-Superior MSA	145,571	145,204	144,665	139,932	140,625	140,290	5,639	4,579	4,375	3.9	3.2	3.0
Rochester MSA	126,030	127,239	119,635	123,090	124,586	117,372	2,940	2,653	2,263	2.3	2.1	1.9
St. Cloud MSA	115,111	115,833	112,682	111,953	113,143	110,194	3,158	2,690	2,488	2.7	2.3	2.2
Mankato-N Mankato MSA	64,315	64,496	63,064	63,017	63,203	62,030	1,298	1,293	1,034	2.0	2.0	1.6
Fargo-Moorhead MSA	138,588	138,130	135,217	135,956	135,864	132,695	2,632	2,266	2,522	1.9	1.6	1.9
Grand Forks MSA	54,816	55,032	54,111	53,636	53,636	53,003	1,180	1,007	1,108	2.2	1.8	2.0
Region One	**47,594**	**48,273**	**46,823**	**46,046**	**47,011**	**45,522**	**1,548**	**1,262**	**1,301**	**3.3**	**2.6**	**2.8**
Kittson	2,387	2,472	2,339	2,318	2,410	2,293	69	62	46	2.9	2.5	2.0
Marshall	5,532	5,651	5,438	5,266	5,483	5,199	266	168	239	4.8	3.0	4.4
Norman	3,379	3,493	3,297	3,258	3,412	3,193	121	81	104	3.6	2.3	3.2
Pennington	8,992	9,030	8,787	8,715	8,790	8,572	277	240	215	3.1	2.7	2.4
Polk	17,088	17,314	16,728	16,585	16,887	16,310	503	427	418	2.9	2.5	2.5
Red Lake	2,267	2,294	2,229	2,180	2,213	2,145	87	81	84	3.8	3.5	3.8
Roseau	7,949	8,019	8,005	7,724	7,816	7,810	225	203	195	2.8	2.5	2.4
Region Two	**44,377**	**44,418**	**42,958**	**42,284**	**42,925**	**41,272**	**2,093**	**1,493**	**1,686**	**4.7**	**3.4**	**3.9**
Beltrami	25,118	25,002	24,278	24,101	24,244	23,498	1,017	758	780	4.0	3.0	3.2
Clearwater	4,538	4,528	4,420	4,232	4,311	4,156	306	217	264	6.7	4.8	6.0
Hubbard	9,991	10,084	9,649	9,455	9,727	9,188	536	357	461	5.4	3.5	4.8
Lake of the Woods	2,378	2,441	2,307	2,255	2,358	2,207	123	83	100	5.2	3.4	4.3
Mahnomen	2,352	2,363	2,304	2,241	2,285	2,223	111	78	81	4.7	3.3	3.5
Region Three	**166,665**	**166,427**	**163,077**	**159,377**	**160,802**	**157,335**	**7,288**	**5,625**	**5,742**	**4.4**	**3.4**	**3.5**
Aitkin	7,363	7,332	7,150	6,932	7,048	6,765	431	284	385	5.9	3.9	5.4
Carlton	18,051	18,013	17,668	17,317	17,409	17,117	734	604	551	4.1	3.4	3.1
Cook	2,984	3,130	2,869	2,851	3,045	2,771	133	85	98	4.5	2.7	3.4
Itasca	22,358	22,272	21,660	21,034	21,370	20,580	1,324	902	1,080	5.9	4.0	5.0
Koochiching	5,965	6,058	5,892	5,553	5,701	5,519	412	357	373	6.9	5.9	6.3
Lake	5,456	5,551	5,376	5,233	5,401	5,218	223	150	158	4.1	2.7	2.9
St. Louis	104,488	104,071	102,462	100,457	100,828	99,365	4,031	3,243	3,097	3.9	3.1	3.0
City of Duluth	46,815	46,886	46,040	45,483	45,651	44,989	1,332	1,235	1,051	2.8	2.6	2.3
Balance of St. Louis County	57,673	57,185	56,422	54,974	55,177	54,376	2,699	2,008	2,046	4.7	3.5	3.6
Region Four	**129,747**	**130,805**	**126,204**	**126,012**	**127,848**	**123,183**	**3,735**	**2,957**	**3,021**	**2.9**	**2.3**	**2.4**
Becker	19,028	19,067	18,391	18,371	18,613	17,867	657	454	524	3.5	2.4	2.8
Clay	36,911	36,909	35,816	36,084	36,160	35,142	827	749	674	2.2	2.0	1.9
Douglas	20,940	21,033	20,357	20,378	20,577	19,864	562	456	493	2.7	2.2	2.4
Grant	3,348	3,440	3,277	3,230	3,338	3,184	118	102	93	3.5	3.0	2.8
Otter Tail	31,846	32,172	31,066	30,721	31,331	30,170	1,125	841	896	3.5	2.6	2.9
Pope	6,677	6,793	6,459	6,492	6,659	6,329	185	134	130	2.8	2.0	2.0
Stevens	5,602	5,752	5,514	5,476	5,651	5,423	126	101	91	2.2	1.8	1.7
Traverse	1,786	1,835	1,737	1,732	1,796	1,696	54	39	41	3.0	2.1	2.4
Wilkin	3,609	3,804	3,587	3,528	3,723	3,508	81	81	79	2.2	2.1	2.2
Region Five	**85,444**	**85,870**	**83,076**	**81,437**	**83,299**	**79,809**	**4,007**	**2,571**	**3,267**	**4.7**	**3.0**	**3.9**
Cass	14,493	14,688	14,073	13,676	14,179	13,375	817	509	698	5.6	3.5	5.0
Crow Wing	32,791	32,954	31,885	31,388	32,011	30,734	1,403	943	1,151	4.3	2.9	3.6
Morrison	17,991	18,096	17,524	17,109	17,547	16,828	882	549	696	4.9	3.0	4.0
Todd	14,062	14,129	13,648	13,479	13,767	13,175	583	362	473	4.1	2.6	3.5
Wadena	6,107	6,003	5,946	5,785	5,795	5,697	322	208	249	5.3	3.5	4.2
Region Six East	**67,593**	**68,555**	**66,000**	**65,650**	**66,936**	**64,541**	**1,943**	**1,619**	**1,459**	**2.9**	**2.4**	**2.2**
Kandiyohi	25,450	25,737	24,800	24,808	25,195	24,289	642	542	511	2.5	2.1	2.1
McLeod	19,519	19,618	19,239	18,934	19,111	18,805	585	507	434	3.0	2.6	2.3
Meeker	13,336	13,446	13,019	12,914	13,125	12,713	422	321	306	3.2	2.4	2.4
Renville	9,288	9,754	8,942	8,994	9,505	8,734	294	249	208	3.2	2.6	2.3

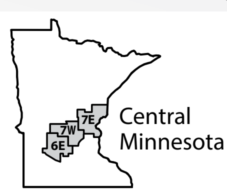
*Minneapolis-St. Paul Metropolitan Statistical Area (MSA) now includes Sherburne County in Minnesota and Pierce County in Wisconsin. St. Cloud MSA is now comprised of Benton and Stearns counties.

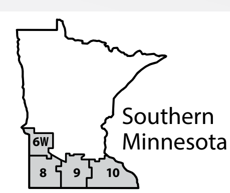
Labor Force Estimates

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

County/ Area	Labor Force			Employment			Unemployment			Rate of Unemployment		
	Nov 2019	Oct 2019	Nov 2018	Nov 2019	Oct 2019	Nov 2018	Nov 2019	Oct 2019	Nov 2018	Nov 2019	Oct 2019	Nov 2018
Region Six West	**23,961**	**24,432**	**23,289**	**23,147**	**23,794**	**22,751**	**814**	**638**	**538**	**3.4%**	**2.6%**	**2.3%**
Big Stone	2,491	2,589	2,437	2,406	2,538	2,371	85	51	66	3.4	2.0	2.7
Chippewa	7,115	7,214	6,921	6,900	7,011	6,771	215	203	150	3.0	2.8	2.2
Lac Qui Parle	3,569	3,685	3,516	3,472	3,593	3,436	97	92	80	2.7	2.5	2.3
Swift	5,246	5,269	4,987	4,983	5,124	4,873	263	145	114	5.0	2.8	2.3
Yellow Medicine	5,540	5,675	5,428	5,386	5,528	5,300	154	147	128	2.8	2.6	2.4
Region Seven East	**88,698**	**88,392**	**86,997**	**85,193**	**85,728**	**84,368**	**3,505**	**2,664**	**2,629**	**4.0**	**3.0**	**3.0**
Chisago	30,131	30,046	29,611	29,159	29,253	28,887	972	793	724	3.2	2.6	2.4
Isanti	21,424	21,359	21,063	20,687	20,750	20,514	737	609	549	3.4	2.9	2.6
Kanabec	9,096	9,015	8,870	8,601	8,717	8,512	495	298	358	5.4	3.3	4.0
Mille Lacs	12,994	12,872	12,711	12,378	12,441	12,262	616	431	449	4.7	3.3	3.5
Pine	15,053	15,100	14,742	14,368	14,567	14,193	685	533	549	4.6	3.5	3.7
Region Seven West	**243,464**	**243,965**	**238,756**	**236,541**	**238,109**	**233,322**	**6,923**	**5,856**	**5,434**	**2.8**	**2.4**	**2.3**
Benton	22,398	22,449	21,774	21,652	21,845	21,228	746	604	546	3.3	2.7	2.5
Sherburne	52,475	52,350	51,737	50,897	51,024	50,497	1,578	1,326	1,240	3.0	2.5	2.4
Stearns	92,713	93,384	90,569	90,301	91,298	88,567	2,412	2,086	2,002	2.6	2.2	2.2
Wright	75,878	75,782	74,676	73,691	73,942	73,030	2,187	1,840	1,646	2.9	2.4	2.2
Region Eight	**65,364**	**66,798**	**63,926**	**63,716**	**65,255**	**62,663**	**1,648**	**1,543**	**1,263**	**2.5**	**2.3**	**2.0**
Cottonwood	6,137	6,122	5,919	5,978	5,951	5,779	159	171	140	2.6	2.8	2.4
Jackson	5,735	5,887	5,649	5,609	5,767	5,536	126	120	113	2.2	2.0	2.0
Lincoln	3,336	3,474	3,205	3,229	3,395	3,154	107	79	51	3.2	2.3	1.6
Lyon	15,069	15,349	14,801	14,700	15,035	14,532	369	314	269	2.4	2.0	1.8
Murray	4,965	5,146	4,882	4,837	5,029	4,759	128	117	123	2.6	2.3	2.5
Nobles	11,546	11,810	11,243	11,250	11,476	11,049	296	334	194	2.6	2.8	1.7
Pipestone	5,126	5,248	4,972	5,014	5,146	4,889	112	102	83	2.2	1.9	1.7
Redwood	7,611	7,790	7,567	7,376	7,592	7,366	235	198	201	3.1	2.5	2.7
Rock	5,839	5,972	5,688	5,723	5,864	5,599	116	108	89	2.0	1.8	1.6
Region Nine	**136,931**	**138,367**	**133,128**	**133,238**	**135,118**	**130,244**	**3,693**	**3,249**	**2,884**	**2.7**	**2.3**	**2.2**
Blue Earth	42,432	42,522	40,879	41,548	41,635	40,163	884	887	716	2.1	2.1	1.8
Brown	14,765	15,000	14,430	14,343	14,641	14,099	422	359	331	2.9	2.4	2.3
Faribault	7,076	7,358	6,897	6,784	7,150	6,712	292	208	185	4.1	2.8	2.7
Le Sueur	16,142	16,131	15,852	15,562	15,716	15,404	580	415	448	3.6	2.6	2.8
Martin	10,387	10,563	10,191	10,103	10,284	9,945	284	279	246	2.7	2.6	2.4
Nicollet	21,883	21,974	21,073	21,469	21,568	20,737	414	406	336	1.9	1.8	1.6
Sibley	8,611	8,826	8,449	8,341	8,603	8,239	270	223	210	3.1	2.5	2.5
Waseca	8,881	9,123	8,859	8,564	8,849	8,621	317	274	238	3.6	3.0	2.7
Watonwan	6,754	6,870	6,498	6,524	6,672	6,324	230	198	174	3.4	2.9	2.7
Region Ten	**289,058**	**290,861**	**282,980**	**281,886**	**284,453**	**277,441**	**7,172**	**6,408**	**5,539**	**2.5**	**2.2**	**2.0**
Dodge	12,062	12,249	11,740	11,740	11,965	11,491	322	284	249	2.7	2.3	2.1
Fillmore	11,723	12,031	11,423	11,427	11,770	11,168	296	261	255	2.5	2.2	2.2
Freeborn	16,223	16,414	15,972	15,692	15,997	15,549	531	417	423	3.3	2.5	2.6
Goodhue	27,333	27,586	26,812	26,650	26,993	26,278	683	593	534	2.5	2.1	2.0
Houston	10,876	10,921	10,492	10,618	10,684	10,304	258	237	188	2.4	2.2	1.8
Mower	20,786	20,840	20,454	20,239	20,342	20,035	547	498	419	2.6	2.4	2.0
Olmsted	89,634	90,138	87,474	87,719	88,321	85,934	1,915	1,817	1,540	2.1	2.0	1.8
City of Rochester	66,296	66,692	62,760	64,898	65,344	61,642	1,398	1,348	1,118	2.1	2.0	1.8
Rice	37,746	37,774	36,781	36,834	36,947	36,051	912	827	730	2.4	2.2	2.0
Steele	20,659	20,665	20,747	20,105	20,144	20,347	554	521	400	2.7	2.5	1.9
Wabasha	12,611	12,821	12,197	12,204	12,530	11,927	407	291	270	3.2	2.3	2.2
Winona	29,405	29,422	28,888	28,658	28,760	28,357	747	662	531	2.5	2.3	1.8
Region Eleven	**1,740,588**	**1,740,986**	**1,716,152**	**1,695,560**	**1,697,004**	**1,681,620**	**45,028**	**43,982**	**34,532**	**2.6**	**2.5**	**2.0**
Anoka	199,810	199,638	197,066	194,337	194,550	192,810	5,473	5,088	4,256	2.7	2.5	2.2
Carver	58,792	59,052	57,942	57,387	57,630	56,888	1,405	1,422	1,054	2.4	2.4	1.8
Dakota	243,877	243,894	240,550	237,620	237,857	235,788	6,257	6,037	4,762	2.6	2.5	2.0
Hennepin	715,795	715,875	705,514	697,581	697,783	691,602	18,214	18,092	13,912	2.5	2.5	2.0
City of Bloomington	47,377	47,380	46,720	46,129	46,142	45,733	1,248	1,238	987	2.6	2.6	2.1
City of Minneapolis	245,605	245,763	240,535	239,296	239,365	235,903	6,309	6,398	4,632	2.6	2.6	1.9
Ramsey	293,857	293,970	289,606	285,829	286,033	283,456	8,028	7,937	6,150	2.7	2.7	2.1
City of St. Paul	161,265	161,371	159,035	156,730	156,842	155,619	4,535	4,529	3,416	2.8	2.8	2.1
Scott	84,192	84,156	83,027	82,107	82,210	81,453	2,085	1,946	1,574	2.5	2.3	1.9
Washington	144,265	144,401	142,447	140,699	140,941	139,623	3,566	3,460	2,824	2.5	2.4	2.0







Industrial Analysis

Monthly analysis is based on ***seasonally adjusted*** employment data; yearly analysis is based on ***unadjusted*** employment data.*

Overview

Total Nonfarm employment was off by 3,000 (0.1 percent) in November on a seasonally adjusted basis. The loss came entirely from goods producers, which shed 7,600 jobs or 1.7 percent, while service providers added 4,600 (0.2 percent). Over the year Minnesota employers added 5,911 jobs (0.2 percent). Goods producers lost 4,236 jobs (0.9 percent), but that loss was overcome by the addition of 10,147 jobs (0.4 percent) among service providers. The private sector added 4,451 jobs (0.2 percent) while the public sector added 1,460 (0.3 percent).

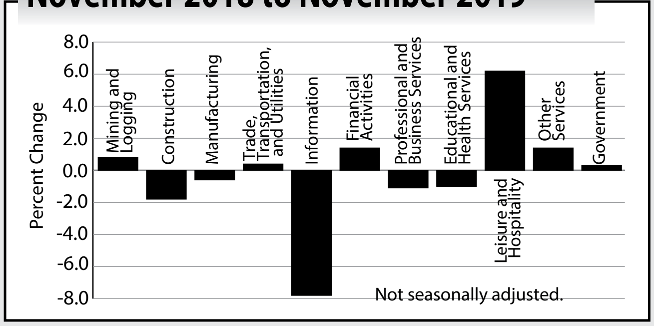
Mining and Logging

Mining and Logging employment was down by 100 (1.5 percent) in November. It was the first month with non-static employment levels in the supersector since March. On the year Mining and Logging employers added 50 jobs (0.8 percent).

Construction

Employment in Construction was down sharply in November as employers shed 4,900 jobs or 3.8 percent, the largest real and proportional decline of any supersector in the state. It was the fourth consecutive month of flat or negative growth in Construction following a strong spring and summer. Over the year Construction employment was down by 2,296 or 1.8 percent. It was their first month of over-the-year job losses since April of 2018, suggesting an especially inhospitable fall for the highly seasonal supersector. Annual declines were driven primarily by the loss of 1,691 jobs (9.9 percent) in Heavy and Civil Engineering Construction.

MN Employment Growth
November 2018 to November 2019



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

Manufacturing

Manufacturers lost 2,600 jobs (0.8 percent) in November, with declines coming in both Durable and Non-Durable Goods Manufacturing. The supersector had added 2,300 jobs over the previous two months. Manufacturing employment was also down annually as the supersector lost 1,990 jobs (0.6 percent). Over-the-year declines came entirely from Durable Goods Manufacturers, which shed 3,652 jobs (1.8 percent). Their counterparts in Non-Durable Goods Manufacturing added 1,662 jobs (1.4 percent) despite the loss of 315 jobs (0.7 percent) in the important Food Manufacturing component sector. November's over-the-year job loss in the supersector came on the heels of 0.3 percent annual growth in October.

Trade, Transportation, and Utilities

Employment in Trade, Transportation, and Utilities was stable in November as employers added 300 jobs (0.1 percent). Transportation, Warehousing, and Utilities was up by 400 (0.4 percent) while Retail Trade employment was off by 100 (0.0 percent), and Wholesale Trade was flat. Over the year the supersector added 2,326 jobs (0.4 percent). Retail Trade drove the growth, up 1,854 (0.6 percent), while Wholesale Trade added 500 jobs (0.4 percent), and Transportation, Warehousing, and Utilities lost 78 (0.1 percent).

Information

Information employers lost 100 jobs (0.2 percent) in November. The supersector has experienced negative growth in three consecutive months. Annually Information employment was down by 3,830 (7.8 percent). The supersector continued its years-long decline and has lost jobs on an annual basis every month for more than two years

*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.

Financial Activities

Financial Activities employment was up by 300 (0.2 percent) in November. Finance and Insurance employers added 1,100 jobs (0.7 percent), but that growth was counterbalanced by a loss of 800 (2.3 percent) in Real Estate and Rental and Leasing. Annually the supersector added 2,518 jobs (1.4 percent). The driver of that growth was Finance and Insurance, which added 3,661 jobs or 2.5 percent. Real Estate and Rental and Leasing lost 1,143 jobs (3.2 percent).

Professional and Business Services

Professional and Business Services employment was up by 800 (0.2 percent) in November. Professional, Scientific, and Technical Services added 700 jobs (0.4 percent), Administrative and Support and Waste Management and Remediation Services added 300 (0.2 percent), and Management of Companies and Enterprises lost 200 (0.2 percent). On the year the supersector lost 4,378 jobs (1.1 percent), with the losses primarily coming from the Administrative and Support and Waste Management and Remediation Services component sector (down 6,666 jobs or 4.9 percent).

Educational and Health Services

Employment in Educational and Health Services was off by 1,500 (0.3 percent) in November, with declines in both component sectors. Educational Services lost 700 jobs (1 percent) while Health Care and Social Assistance lost 800 (0.2 percent). Over the year the supersector lost 5,631 jobs (1 percent). Over-the-year job growth has held at roughly the same level since September.

Leisure and Hospitality

Leisure and Hospitality employment was up by 3,800 jobs (1.3 percent) in November. It was the continuation of an unusually strong run for the supersector, which added more than 2,000 jobs in every month since August. Arts, Entertainment, and Recreation was up by 2,000 (4.1 percent) while Accommodation and Food Services was up by 1,800 (0.8 percent). On the year Leisure and Hospitality added 16,113 jobs (6.2 percent) with growth in both component sectors. The supersector has shown over-the-year job growth consistently since April of 2018 and has had annual growth of greater than 1 percent for every month in 2019, with especially robust growth since early summer.

Other Services

Employment in the Other Services supersector was up by 900 (0.8 percent) on the month. For the year the supersector added 1,569 jobs (1.4 percent), a sharp turnaround after posting a 0.5 percent over-the-year decline in October. November's growth was shared between all three component sectors. Repair and Maintenance added 335 jobs (1.5 percent), Personal and Laundry Services added 215 (0.8 percent), and Religious, Grantmaking, Civic, Professional, and Similar Organizations added 1,019 (1.6 percent).

Government

Government employment was mostly flat in November, up by 100 jobs or 0.0 percent. The only movement came at the Local Government level. Annually public sector employers added 1,460 jobs (0.3 percent), with growth at all three component levels. Federal employers added 412 jobs (1.3 percent), State employers added 451 (0.4 percent), and Local employment was up 597 (0.2 percent). Most of the growth came from the non-Educational Services side of the supersector, as education employment growth was largely flat.

by Nick Dobbins

Seasonally Adjusted Nonfarm Employment

In 1,000's

Industry	Nov 2019	Oct 2019	Sept 2019
Total Nonagricultural	**2,966.8**	**2,969.8**	**2,964.6**
Goods-Producing	**451.5**	**459.1**	**458.0**
Mining and Logging	6.7	6.8	6.8
Construction	125.0	129.9	129.9
Manufacturing	319.8	322.4	321.3
Service-Providing	**2,515.3**	**2,510.7**	**2,506.6**
Trade, Transportation, and Utilities	537.3	537.0	535.2
Information	45.1	45.2	46.2
Financial Activities	187.1	186.8	187.9
Professional and Business Services	374.9	374.1	374.4
Educational and Health Services	540.2	541.7	541.4
Leisure and Hospitality	291.0	287.2	282.1
Other Services	113.4	112.5	113.3
Government	426.3	426.2	426.1

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

Regional Analysis

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

The Minneapolis-St. Paul area lost 7,970 jobs (0.4 percent) in November, which was slightly ahead of the state's 0.5 percent decrease. As was the case statewide, the metro area declines were largely driven by losses in Mining, Logging, and Construction, which was off by 7,868 (8.5 percent). Component Specialty Trade Contractors was responsible for 5,004 of that decline (down 8.4 percent). Leisure and Hospitality, another highly seasonal supersector, lost 2,539 jobs (1.3 percent) with a loss of 2,299 (6.5 percent) in Arts, Entertainment, and Recreation. The largest increase, in both real and proportional terms, came in Trade, Transportation, and Utilities, which added 5,597 jobs or 1.5 percent. Each of the three major component sectors added jobs. Over the year the Twin Cities metro lost 5,729 jobs (0.3 percent). It was the only metropolitan statistical area (MSA) in the state to lose jobs on an annual basis, which it has done for four consecutive months. November's annual decline was broad-based, but largely driven by the loss of 10,189 jobs (3 percent) in Educational and Health Services. Health Care and Social Assistance was off by 9,495 (3.3 percent) with Nursing and Residential Care Facilities down 3,055 (5.2 percent) and Ambulatory Health Care Services down 4,322 (4.6 percent). Leisure and Hospitality was up by 5,748 jobs (3.1 percent), with all of that growth coming from the Accommodation and Food Services component sector (up by 6,638 or 4.4 percent).

Duluth-Superior MSA

Employment in the Duluth-Superior MSA was down by 804 (0.6 percent) in November. Mining, Logging, and Construction lost 1,202 jobs (11.2 percent), and Leisure and Hospitality lost 547 (3.8 percent). Trade, Transportation, and Utilities added 651 jobs (2.6 percent), the largest real and proportional gains of any supersector in the area, as Retail employers added 603 jobs (4 percent) in advance of the holiday season. Annually employment in the Duluth MSA was mostly flat, as the area added 12 jobs (0.0 percent). With every other MSA in the state adding jobs faster on the year, the two lowest growth rates belonged to Minnesota's two largest MSAs. Mining, Logging, and Construction lost 434 jobs (4.4 percent) in Duluth while Trade, Transportation, and Utilities added 494 (2 percent), mirroring the monthly changes.

Rochester MSA

Employers in Rochester lost 972 jobs (0.8 percent) in November. It was the largest decline of any MSA in the state. Manufacturing employment was off by 445 (3.8 percent), driving the losses, but seven of the area's 10 published supersectors lost jobs on the month. Other Services employment was perfectly flat, while Trade, Transportation, and Utilities and Government each added 154 jobs (0.8 and 1.2 percent, respectively). Over the year the Rochester MSA added 1,253 jobs (1 percent). Trade, Transportation, and Utilities added 862 jobs (4.8 percent) as Retail employment was up by 778 (6.3 percent). Manufacturing was up by 390 (3.6 percent). Educational and Health Services lost 506 jobs (1.0 percent).

St. Cloud MSA

The St. Cloud MSA lost 609 jobs (0.5 percent) in November. Mining, Logging, and Construction lost 477 jobs (5.8 percent), and Leisure and Hospitality lost 298 (3.6 percent). Trade, Transportation, and Utilities added 244 jobs (1.1 percent). On the year the MSA added 1,016 jobs (0.9 percent). Mining, Logging, and Construction added 591 jobs (8.3 percent), giving it the largest proportional over-the-year job growth while at the same time it had the largest proportional over-the-month job loss. Financial Activities employment was up by 146 jobs or 2.8 percent.

Mankato-North Mankato MSA

The Mankato-North Mankato MSA added 189 jobs (0.3 percent). Service providers added 346 jobs (0.7 percent) while goods producers lost 157 (1.5). It was the only MSA primarily in Minnesota to add jobs in November. Both MSAs shared with North Dakota also added jobs. On the year the Mankato area added 1,518 jobs (2.5 percent). It was the largest over-the-year employment increase in the state. Service providers added 1,599 (3.3 percent) while goods producers lost 81 (0.8 percent).

Fargo-Moorhead MSA

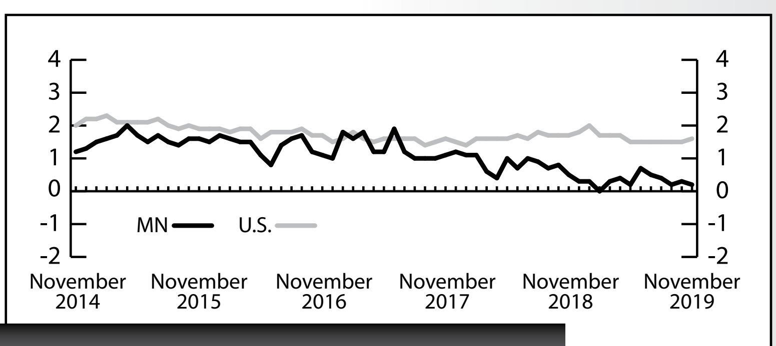
The Fargo-Moorhead MSA added 461 jobs (0.3 percent) in November. Trade, Transportation, and Utilities led the way, adding 485 jobs (1.7 percent), with most of that gain coming in Retail Trade (up 461 or 3.2 percent). Over the year the MSA added 2,364 jobs (1.7 percent). Professional and Business Services added 1,295 (8.2 percent), and Leisure and Hospitality added 943 (6.9 percent), while Trade, Transportation, and Utilities employment was down by 825 (2.7 percent) with most of that loss coming in Retail Trade (down 1,066 or 6.7 percent).

Grand Forks-East Grand Forks MSA

Employment in the Grand Forks-East Grand Forks MSA was largely flat in November as the area added 35 jobs (0.1 percent), making it one of only three MSAs in the state to add jobs on the month. Government employers added 191 jobs (1.4 percent), and Trade, Transportation, and Utilities was up by 129 (1.2 percent), while Mining, Logging, and Construction was down by 282 (9.6 percent). On the year employers added 169 jobs (0.3 percent). Government employers added 256 jobs (1.9 percent). Trade, Transportation, and Utilities employment was off by 268 (2.4 percent), and Mining, Logging, and Construction was down 146 (5.1 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	Jobs* (Thousands)			Percent Change From**		Production Workers Hours and Earnings: Average Weekly Earnings		Average Weekly Hours		Average Hourly Earnings	
	Nov 2019	Oct 2019	Nov 2018	Oct 2019	Nov 2018	Nov 2019	Nov 2018	Nov 2019	Nov 2018	Nov 2019	Nov 2018
TOTAL NONFARM WAGE AND SALARY	**2,981.5**	**2,996.3**	**2,975.6**	**-0.5%**	**0.2%**	-	-	-	-	-	-
GOODS-PRODUCING	**452.1**	**470.1**	**456.3**	**-3.8**	**-0.9**	-	-	-	-	-	-
Mining, Logging, and Construction	**132.9**	**145.7**	**135.2**	**-8.8**	**-1.7**	-	-	-	-	-	-
Mining and Logging	**6.7**	**7.0**	**6.6**	**-4.4**	**0.8**	-	-	-	-	-	-
Construction	**126.2**	**138.7**	**128.5**	**-9.0**	**-1.8**	-	-	-	-	-	-
Specialty Trade Contractors	83.0	90.9	83.5	-8.7	-0.5	$1,234.03	$1,206.67	37.6	36.8	$32.82	$32.79
Manufacturing	**319.2**	**324.3**	**321.2**	**-1.6**	**-0.6**	**955.27**	**904.13**	**41.3**	**40.8**	**23.13**	**22.16**
Durable Goods	202.1	205.3	205.8	-1.5	-1.8	967.14	900.82	39.8	39.2	24.30	22.98
Wood Product Manufacturing	12.1	12.1	11.9	0.3	2.0	-	-	-	-	-	-
Fabricated Metal Production	44.0	43.9	43.7	0.2	0.6	-	-	-	-	-	-
Machinery Manufacturing	34.0	34.2	34.1	-0.7	-0.5	-	-	-	-	-	-
Computer and Electronic Product	46.1	46.1	45.6	0.2	1.1	-	-	-	-	-	-
Navigational, Measuring, Electromedical and Control	27.1	27.1	26.9	0.2	0.8	-	-	-	-	-	-
Transportation Equipment	11.4	11.3	10.9	1.1	4.8	-	-	-	-	-	-
Medical Equipment and Supplies Manufacturing	16.5	16.5	16.3	0.2	1.3	-	-	-	-	-	-
Nondurable Goods	117.1	119.0	115.4	-1.7	1.4	933.91	909.15	43.6	43.5	21.42	20.90
Food Manufacturing	46.4	48.6	46.7	-4.5	-0.7	-	-	-	-	-	-
SERVICE-PROVIDING	**2,529.4**	**2,526.2**	**2,519.3**	**0.1**	**0.4**	-	-	-	-	-	-
Trade, Transportation, and Utilities	**547.3**	**539.7**	**544.9**	**1.4**	**0.4**	-	-	-	-	-	-
Wholesale Trade	131.3	130.5	130.8	0.6	0.4	1,135.82	1,050.69	39.7	38.6	28.61	27.22
Retail Trade	306.7	300.7	304.9	2.0	0.6	435.00	450.36	26.3	27.8	16.54	16.20
Motor Vehicle and Parts	36.6	36.7	36.0	-0.2	1.7	-	-	-	-	-	-
Building Material and Garden Equipment	26.1	26.5	25.8	-1.4	1.5	-	-	-	-	-	-
Food and Beverage Stores	57.5	58.2	56.7	-1.2	1.4	-	-	-	-	-	-
Gasoline Stations	26.4	26.2	26.0	0.8	1.7	-	-	-	-	-	-
General Merchandise Stores	65.7	60.8	66.8	8.1	-1.6	401.74	410.35	26.5	29.5	15.16	13.91
Transportation,Warehouse, Utilities	109.3	108.5	109.3	0.7	-0.1	-	-	-	-	-	-
Transportation and Warehousing	96.9	96.2	97.0	0.7	-0.1	826.58	780.89	34.1	33.4	24.24	23.38
Information	**45.3**	**45.1**	**49.1**	**0.4**	**-7.8**	-	-	-	-	-	-
Publishing Industries	18.3	18.3	19.0	-0.3	-3.7	-	-	-	-	-	-
Telecommunications	11.3	11.3	12.0	0.9	-5.7	-	-	-	-	-	-
Financial Activities	**187.0**	**187.1**	**184.5**	**-0.1**	**1.4**	-	-	-	-	-	-
Finance and Insurance	153.0	152.0	149.3	0.6	2.5	1,174.90	1,230.98	36.9	37.1	31.84	33.18
Credit Intermediation	66.1	65.6	64.2	0.8	3.0	833.02	818.63	36.6	38.2	22.76	21.43
Securities, Commodity Contracts, and Other	21.0	20.8	20.4	0.8	3.1	-	-	-	-	-	-
Insurance Carriers and Related	65.9	65.6	64.7	0.5	1.7	-	-	-	-	-	-
Real Estate and Rental and Leasing	34.0	35.1	35.2	-3.1	-3.2	-	-	-	-	-	-
Professional and Business Services	**377.6**	**379.0**	**382.0**	**-0.3**	**-1.1**	-	-	-	-	-	-
Professional, Scientific, and Technical Services	166.3	166.6	164.0	-0.2	1.4	-	-	-	-	-	-
Legal Services	18.3	18.3	18.3	-0.1	-0.3	-	-	-	-	-	-
Accounting, Tax Preparation	14.8	14.9	14.6	-0.9	1.2	-	-	-	-	-	-
Computer Systems Design	35.4	35.1	36.5	0.9	-2.9	-	-	-	-	-	-
Management of Companies and Enterprises	81.4	81.7	81.3	-0.4	0.1	-	-	-	-	-	-
Administrative and Support Services	130.0	130.6	136.7	-0.5	-4.9	-	-	-	-	-	-
Educational and Health Services	**542.9**	**544.3**	**548.5**	**-0.3**	**-1.0**	-	-	-	-	-	-
Educational Services	70.4	70.3	70.6	0.1	-0.3	-	-	-	-	-	-
Health Care and Social Assistance	472.5	474.0	477.9	-0.3	-1.1	-	-	-	-	-	-
Ambulatory Health Care	156.4	158.1	158.9	-1.1	-1.6	1,142.28	1,233.84	33.4	36.3	34.20	33.99
Offices of Physicians	76.4	76.2	75.7	0.2	0.9	-	-	-	-	-	-
Hospitals	116.3	116.0	115.8	0.2	0.4	-	-	-	-	-	-
Nursing and Residential Care Facilities	104.6	105.5	106.7	-0.8	-2.0	531.09	480.94	28.1	27.8	18.90	17.30
Social Assistance	95.3	94.4	96.5	1.0	-1.2	-	-	-	-	-	-
Leisure and Hospitality	**277.8**	**284.0**	**261.7**	**-2.2**	**6.2**	-	-	-	-	-	-
Arts, Entertainment, and Recreation	44.4	47.6	42.9	-6.7	3.4	-	-	-	-	-	-
Accommodation and Food Services	233.4	236.4	218.8	-1.3	6.7	-	-	-	-	-	-
Food Services and Drinking Places	206.0	207.6	192.0	-0.8	7.3	294.35	277.41	20.3	19.9	14.50	13.94
Other Services	**114.1**	**112.8**	**112.6**	**1.2**	**1.4**	-	-	-	-	-	-
Religious, Grantmaking, Civic, Professional Organizations	63.7	64.3	62.7	-1.0	1.6	-	-	-	-	-	-
Government	**437.4**	**434.3**	**436.0**	**0.7**	**0.3**	-	-	-	-	-	-
Federal Government	32.2	32.4	31.8	-0.6	1.3						
State Government	105.6	105.0	105.1	0.6	0.4						
State Government Education	64.0	63.1	64.0	1.5	0.1						
Local Government	299.6	296.9	299.0	0.9	0.2						
Local Government Education	152.0	149.4	152.0	1.7	0.0						

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* (Thousands)			Percent Change From**		Production Workers Hours and Earnings: Average Weekly Earnings		Average Weekly Hours		Average Hourly Earnings	
	Nov 2019	Oct 2019	Nov 2018	Oct 2019	Nov 2018	Nov 2019	Nov 2018	Nov 2019	Nov 2018	Nov 2019	Nov 2018
TOTAL NONFARM WAGE AND SALARY	**2,021.3**	**2,029.3**	**2,027.0**	**-0.4%**	**-0.3%**	-	-	-	-	-	-
GOODS-PRODUCING	**284.0**	**293.8**	**284.6**	**-3.3**	**-0.2**	-	-	-	-	-	-
Mining, Logging, and Construction	**84.5**	**92.4**	**85.0**	**-8.5**	**-0.5**	-	-	-	-	-	-
Construction of Buildings	18.9	19.1	18.6	-1.3	1.3	-	-	-	-	-	-
Specialty Trade Contractors	54.7	59.7	55.9	-8.4	-2.2	$1,372.41	$1,236.24	39.0	36.0	$35.19	$34.34
Manufacturing	**199.4**	**201.4**	**199.7**	**-1.0**	**-0.1**	**1,024.80**	**911.47**	**42.0**	**40.6**	**24.40**	**22.45**
Durable Goods	135.5	137.4	136.6	-1.4	-0.8	1,040.14	932.51	40.3	39.8	25.81	23.43
Fabricated Metal Production	30.5	30.5	30.2	0.0	0.9	-	-	-	-	-	-
Machinery Manufacturing	19.9	20.3	20.6	-2.2	-3.5	-	-	-	-	-	-
Computer and Electronic Product	37.7	37.6	37.2	0.2	1.1	-	-	-	-	-	-
Navigational, Measuring, Electromedical and Control	25.5	25.4	25.2	0.2	1.1	-	-	-	-	-	-
Medical Equipment and Supplies Manufacturing	15.8	15.7	15.3	0.2	2.8	-	-	-	-	-	-
Nondurable Goods	63.9	63.9	63.0	0.0	1.4	995.24	871.80	45.3	42.3	21.97	20.61
Food Manufacturing	14.6	15.2	14.7	-3.9	-0.8	-	-	-	-	-	-
Printing and Related	13.4	13.3	13.7	0.3	-2.5	-	-	-	-	-	-
SERVICE-PROVIDING	**1,737.3**	**1,735.5**	**1,742.4**	**0.1**	**-0.3**	-	-	-	-	-	-
Trade, Transportation, and Utilities	**370.3**	**364.7**	**370.8**	**1.5**	**-0.1**	-	-	-	-	-	-
Wholesale Trade	94.9	94.5	94.7	0.5	0.3	1,238.74	1,058.06	39.3	38.7	31.52	27.34
Merchant Wholesalers - Durable Goods	55.8	55.6	55.2	0.5	1.2	-	-	-	-	-	-
Merchant Wholesalers - Nondurable Goods	32.3	32.2	32.2	0.3	0.3	-	-	-	-	-	-
Retail Trade	195.9	191.1	198.9	2.5	-1.5	476.53	463.39	27.9	28.8	17.08	16.09
Food and Beverage Stores	36.0	36.0	35.7	0.0	0.9	-	-	-	-	-	-
General Merchandise Stores	44.0	40.2	43.5	9.4	1.1	381.58	405.30	25.8	29.2	14.79	13.88
Transportation, Warehouse, Utilities	79.5	79.2	77.3	0.5	2.9	-	-	-	-	-	-
Utilities	7.6	7.6	7.5	0.5	1.3	-	-	-	-	-	-
Transportation and Warehousing	71.9	71.6	69.8	0.5	3.1	959.62	848.33	38.4	36.9	24.99	22.99
Information	**36.6**	**36.5**	**37.4**	**0.3**	**-2.1**	-	-	-	-	-	-
Publishing Industries	15.2	15.3	15.5	-0.2	-1.6	-	-	-	-	-	-
Telecommunications	7.2	7.2	7.8	0.3	-7.6	-	-	-	-	-	-
Financial Activities	**151.7**	**152.1**	**149.9**	**-0.3**	**1.2**	-	-	-	-	-	-
Finance and Insurance	123.8	123.4	121.7	0.3	1.7	1,331.25	1,253.96	37.5	37.6	35.50	33.35
Credit Intermediation	49.4	49.3	48.3	0.3	2.3	-	-	-	-	-	-
Securities, Commodity Contracts, and Other	18.5	18.4	18.2	0.4	1.6	-	-	-	-	-	-
Insurance Carriers and Related	55.9	55.7	55.3	0.4	1.2	-	-	-	-	-	-
Real Estate and Rental and Leasing	27.9	28.8	28.2	-3.1	-1.1	-	-	-	-	-	-
Professional and Business Services	**325.9**	**326.7**	**329.0**	**-0.3**	**-0.9**	-	-	-	-	-	-
Professional, Scientific, and Technical Services	145.6	146.1	144.5	-0.3	0.8	-	-	-	-	-	-
Legal Services	15.7	15.7	15.8	-0.4	-0.8	-	-	-	-	-	-
Architectural, Engineering, and Related	20.5	20.6	19.7	-0.2	4.1	-	-	-	-	-	-
Computer Systems Design	32.8	32.5	33.5	1.1	-1.9	-	-	-	-	-	-
Management of Companies and Enterprises	75.0	75.3	74.8	-0.4	0.2	-	-	-	-	-	-
Administrative and Support Services	105.3	105.4	109.7	-0.1	-4.0	-	-	-	-	-	-
Employment Services	46.5	45.9	51.5	1.3	-9.7	-	-	-	-	-	-
Educational and Health Services	**328.6**	**330.3**	**338.8**	**-0.5**	**-3.0**	-	-	-	-	-	-
Educational Services	46.5	46.6	47.2	-0.1	-1.5	-	-	-	-	-	-
Health Care and Social Assistance	282.1	283.7	291.6	-0.6	-3.3	-	-	-	-	-	-
Ambulatory Health Care	89.9	91.6	94.2	-1.9	-4.6	-	-	-	-	-	-
Hospitals	68.4	68.4	68.7	0.0	-0.4	-	-	-	-	-	-
Nursing and Residential Care Facilities	55.6	56.9	58.7	-2.3	-5.2	-	-	-	-	-	-
Social Assistance	68.2	66.8	70.0	2.1	-2.6	-	-	-	-	-	-
Leisure and Hospitality	**190.0**	**192.6**	**184.3**	**-1.3**	**3.1**	-	-	-	-	-	-
Arts, Entertainment, and Recreation	33.0	35.3	33.9	-6.5	-2.6	-	-	-	-	-	-
Accommodation and Food Services	157.0	157.2	150.4	-0.2	4.4	334.70	319.46	21.4	21.6	15.64	14.79
Food Services and Drinking Places	140.8	141.2	135.1	-0.3	4.3	323.67	317.52	21.1	21.6	15.34	14.70
Other Services	**79.2**	**78.2**	**78.0**	**1.3**	**1.5**	-	-	-	-	-	-
Repair and Maintenance	15.6	15.3	14.7	1.9	6.3	-	-	-	-	-	-
Religious, Grantmaking, Civic, Professional Organizations	41.7	41.6	41.6	0.1	0.2	-	-	-	-	-	-
Government	**255.1**	**254.4**	**254.2**	**0.3**	**0.3**						
Federal Government	21.4	21.5	21.2	-0.5	0.8						
State Government	69.8	69.5	69.0	0.5	1.1						
State Government Education	41.7	41.3	41.5	1.0	0.5						
Local Government	163.8	163.4	164.0	0.3	-0.1						
Local Government Education	91.9	91.2	92.6	0.7	-0.8						

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

Industry	Duluth-Superior MSA Jobs Nov 2019	Jobs Oct 2019	Jobs Nov 2018	% Chg. From Oct 2018	% Chg. From Nov 2018	Rochester MSA Jobs Nov 2019	Jobs Oct 2019	Jobs Nov 2018	% Chg. From Oct 2018	% Chg. From Nov 2018
TOTAL NONFARM WAGE AND SALARY	**138,531**	**139,335**	**138,519**	**-0.6%**	**0.0 %**	**123,988**	**124,960**	**122,735**	**-0.8%**	**1.0 %**
GOODS-PRODUCING	**17,543**	**18,688**	**17,923**	**-6.1**	**-2.1**	**16,201**	**16,832**	**15,699**	**-3.7**	**3.2**
Mining, Logging, and Construction	9,529	10,731	9,963	-11.2	-4.4	5,063	5,249	4,951	-3.5	2.3
Manufacturing	8,014	7,957	7,960	0.7	0.7	11,138	11,583	10,748	-3.8	3.6
SERVICE-PROVIDING	**120,988**	**120,647**	**120,596**	**0.3**	**0.3**	**107,787**	**108,128**	**107,036**	**-0.3**	**0.7**
Trade, Transportation, and Utilities	25,373	24,722	24,879	2.6	2.0	18,828	18,674	17,966	0.8	4.8
Wholesale Trade	3,241	3,251	3,246	-0.3	-0.2	2,891	2,887	2,866	0.1	0.9
Retail Trade	15,509	14,906	15,032	4.0	3.2	13,170	13,089	12,392	0.6	6.3
Transportation, Warehouse, Utilities	6,623	6,565	6,601	0.9	0.3	2,767	2,698	2,708	2.6	2.2
Information	1,213	1,231	1,266	-1.5	-4.2	1,578	1,580	1,624	-0.1	-2.8
Financial Activities	5,460	5,455	5,568	0.1	-1.9	2,723	2,735	2,732	-0.4	-0.3
Professional and Business Services	8,106	8,162	7,947	-0.7	2.0	6,235	6,344	6,118	-1.7	1.9
Educational and Health Services	32,664	32,544	32,717	0.4	-0.2	50,017	50,324	50,523	-0.6	-1.0
Leisure and Hospitality	14,034	14,581	14,151	-3.8	-0.8	11,264	11,483	11,061	-1.9	1.8
Other Services	6,663	6,710	6,550	-0.7	1.7	3,803	3,803	3,816	0.0	-0.3
Government	27,475	27,242	27,518	0.9	-0.2	13,339	13,185	13,196	1.2	1.1

Employer Survey

Industry

Industry	St. Cloud MSA Jobs Nov 2019	Jobs Oct 2019	Jobs Nov 2018	% Chg. From Oct 2018	% Chg. From Nov 2018	Mankato MSA Jobs Nov 2019	Jobs Oct 2019	Jobs Nov 2018	% Chg. From Oct 2018	% Chg. From Nov 2018
TOTAL NONFARM WAGE AND SALARY	**112,385**	**112,994**	**111,369**	**-0.5%**	**0.9 %**	**61,076**	**60,887**	**59,558**	**0.3%**	**2.5 %**
GOODS-PRODUCING	**23,384**	**24,027**	**22,522**	**-2.7**	**3.8**	**10,587**	**10,744**	**10,668**	**-1.5**	**-0.8**
Mining, Logging, and Construction	7,686	8,163	7,095	-5.8	8.3	--	--	--	--	--
Manufacturing	15,698	15,864	15,427	-1.0	1.8	--	--	--	--	--
						--	--	--	--	--
SERVICE-PROVIDING	**89,001**	**88,967**	**88,847**	**0.0**	**0.2**	**50,489**	**50,143**	**48,890**	**0.7**	**3.3**
Trade, Transportation, and Utilities	23,135	22,891	23,028	1.1	0.5	--	--	--	--	--
Wholesale Trade	5,318	5,246	5,182	1.4	2.6	--	--	--	--	--
Retail Trade	13,479	13,320	13,651	1.2	-1.3	--	--	--	--	--
Transportation, Warehouse, Utilities	4,338	4,325	4,195	0.3	3.4	--	--	--	--	--
Information	1,266	1,278	1,332	-0.9	-5.0	--	--	--	--	--
Financial Activities	5,316	5,345	5,170	-0.5	2.8	--	--	--	--	--
Professional and Business Services	8,606	8,612	8,751	-0.1	-1.7	--	--	--	--	--
Educational and Health Services	23,122	23,035	22,780	0.4	1.5	--	--	--	--	--
Leisure and Hospitality	7,952	8,250	8,198	-3.6	-3.0	--	--	--	--	--
Other Services	3,825	3,870	3,762	-1.2	1.7	--	--	--	--	--
Government	15,779	15,686	15,826	0.6	-0.3	10,190	10,176	10,101	0.1	0.9

Employer Survey

Industry

Industry	Fargo-Moorhead MSA Jobs Nov 2019	Jobs Oct 2019	Jobs Nov 2018	% Chg. From Oct 2018	% Chg. From Nov 2018	Grand Forks-East Grand Forks MSA Jobs Nov 2019	Jobs Oct 2019	Jobs Nov 2018	% Chg. From Oct 2018	% Chg. From Nov 2018
TOTAL NONFARM WAGE AND SALARY	**145,976**	**145,515**	**143,612**	**0.3%**	**1.7 %**	**56,630**	**56,595**	**56,461**	**0.1%**	**0.3 %**
GOODS-PRODUCING	**19,319**	**19,720**	**19,182**	**-2.0**	**0.7**	**7,323**	**7,568**	**7,262**	**-3.2**	**0.8**
Mining, Logging, and Construction	8,960	9,272	8,763	-3.4	2.3	2,735	3,017	2,881	-9.4	-5.1
Manufacturing	10,359	10,448	10,419	-0.9	-0.6	4,588	4,551	4,381	0.8	4.7
SERVICE-PROVIDING	**126,657**	**125,795**	**124,430**	**0.7**	**1.8**	**49,307**	**49,027**	**49,199**	**0.6**	**0.2**
Trade, Transportation, and Utilities	29,888	29,403	30,713	1.7	-2.7	11,122	10,993	11,390	1.2	-2.4
Wholesale Trade	8,971	8,966	8,870	0.1	1.1	1,900	1,907	1,860	-0.4	2.2
Retail Trade	14,821	14,360	15,887	3.2	-6.7	6,995	6,867	7,285	1.9	-4.0
Transportation, Warehouse, Utilities	6,096	6,077	5,956	0.3	2.4	2,227	2,219	2,245	0.4	-0.8
Information	3,126	3,092	2,952	1.1	5.9	554	553	563	0.2	-1.6
Financial Activities	10,923	10,787	11,044	1.3	-1.1	1,962	2,027	2,018	-3.2	-2.8
Professional and Business Services	17,068	17,034	15,773	0.2	8.2	3,500	3,495	3,542	0.1	-1.2
Educational and Health Services	25,937	25,800	25,105	0.5	3.3	9,920	9,915	9,828	0.1	0.9
Leisure and Hospitality	14,587	14,504	13,644	0.6	6.9	6,295	6,287	6,154	0.1	2.3
Other Services	5,013	5,030	5,021	-0.3	-0.2	1,971	1,965	1,977	0.3	-0.3
Government	20,115	20,145	20,178	-0.2	-0.3	13,983	13,792	13,727	1.4	1.9

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

Minnesota Economic Indicators

Highlights

The **Minnesota Index**, after climbing over the previous three months, slipped slightly in November, declining 0.1 percent. November's retreat was the result of an uptick in the unemployment rate, a decline in average weekly manufacturing hours, and a dip in wage and salary employment. The U.S. index increased 0.3 percent for the second time in three months. Minnesota's index, after outpacing the U.S. index from August through October, lagged the national index in November.

November's reading was 1.3 percent higher than a year ago, while the U.S. annual gain was 2.8 percent. Economic activity slowed in Minnesota in November after three months of solid growth. Minnesota was one of 10 states reporting a decline in their index in November.

Adjusted **Wage and Salary Employment** dropped by 3,000 jobs in November, and October's job expansion was revised down by 2,200 jobs. All of the job loss was in the private sector with job cutbacks the highest in Construction, Manufacturing, and Educational and Health Services. The Construction workforce drop was the largest in 20 months while the Manufacturing job cutbacks were the highest in over 10 years. Strong hiring in Leisure and Hospitality only partially offset job losses in the other sectors.

Over-the-year job growth for the state, using unadjusted job numbers, fell to 0.2 percent in November while the U.S. job gain was 1.6 percent. Through the first 11 months of the year Minnesota's over-the-year job growth averages out to 0.3 while the U.S. job growth averages out to 1.6 percent.

After declining for three months in a row, **Online Help-Wanted Ads** ticked up slightly in November, increasing 0.9 percent while national job postings rose 2.3 percent. Minnesota's share of nationwide online job postings remained at 2.6 percent which still tops the 2.0 percent share of national wage and salary employment that Minnesota holds. Labor demand has continued to remain solid based on online help-wanted ad levels.

Minnesota's **Purchasing Managers' Index (PMI)**, after a slight uptick in October, dipped in November to 50.9. The index has slipped in five of the last six months. The other two comparable indices also declined with the Mid-America Business Index retreating to 48.6 and the Institute of Supply Management's national PMI dropping to 48.1. Manufacturing in Minnesota and nationally continue to face slow global growth and trade war headwinds.

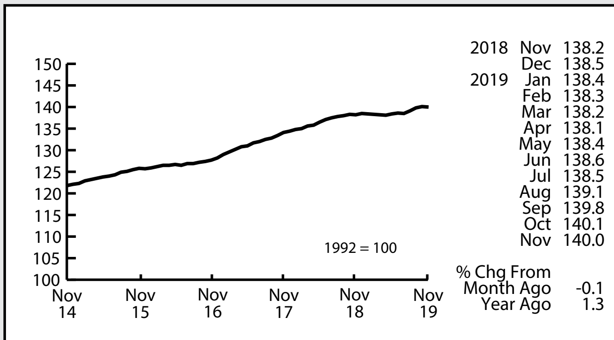
Adjusted average weekly **Manufacturing Hours**, after spiking the previous two months, stumbled in November, dropping to 41.3 hours. The shorter factory workweek was more in tune with the low PMI index. Average weekly **Manufacturing Earnings**, adjusted for inflation and seasonality, also fell in November. Factory paychecks shrank by 1.2 percent from October's record-high to $952.36. Real Manufacturing earnings, adjusted for inflation and seasonally, were still up a very strong 4.2 percent from last November.

The **Minnesota Leading Index** retreated significantly in November, falling to 0.2. The 37-year monthly average is 1.4, so November's reading suggest that Minnesota's economic growth over the next six months will fall way below the long-term average. The state's leading index for November ranked 40th among the states, just below Alaska and slightly ahead of Iowa. Once again the big question is whether Minnesota's labor shortage is restricting how fast Minnesota's economy can expand or are other factors involved.

Residential Building Permits, after surging in October, inched up to 2,835 in November. That is the highest level since August 2018 and 34 percent higher than the long-term monthly average of 2,114. Minnesota home building permits accounted for 2.5 percent of all U.S. home building permits issued in November compared to the 2.2 percent level through the first 11 months of the year.

Seasonally Adjusted **Initial Claims for Unemployment Benefits (UB)** rose for the third straight month to 16,649. November's claims level was the highest since February but remain very low historically. Another record-low initial claim level will be set in 2019 after adjusting for employment size. Monthly initial claims have averaged 20,995 a month since 1970, but wage and salary employment has increased from 1.3 million in 1970 to 2.9 million in 2019. After adjusting for employment, monthly initial claims have averaged 977 initial claims per 100,000 jobs since 1970. The average for 2019 will be roughly 547 claims per 100,000 jobs or 44 percent below the 49-year average. This will be the third year in a row in which initial claims have set a record low.

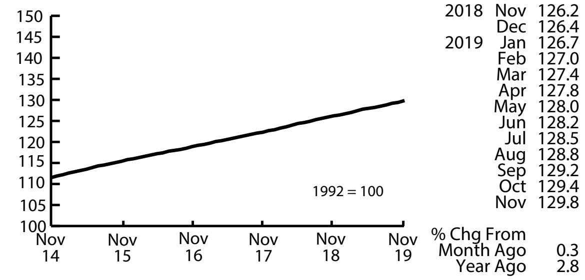
by Dave Senf



Source: The Federal Reserve Bank of Philadelphia, 2019

Minnesota Index

United States Index

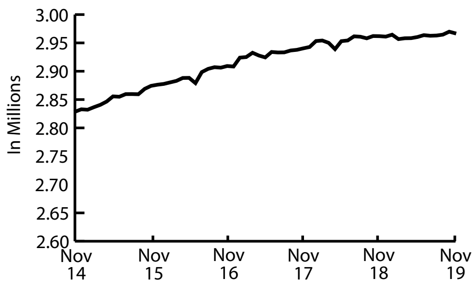


Source: The Federal Reserve Bank of Philadelphia, 2019

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



seasonally adjusted

2019	Jun	2.9637
	Jul	2.9626
	Aug	2.9630
	Sep	2.9646
	Oct	2.9698
	Nov	2.9668

% Chg From Month Ago -0.1

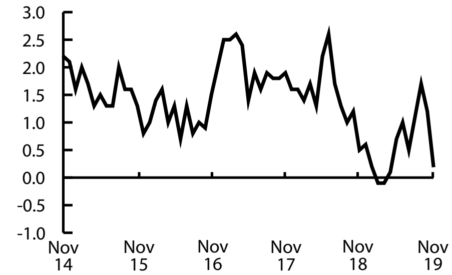
unadjusted

2018	Nov	2,975.6
2019	Nov	2,981.5

% Chg From Year Ago 0.2

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

Minnesota Leading Index

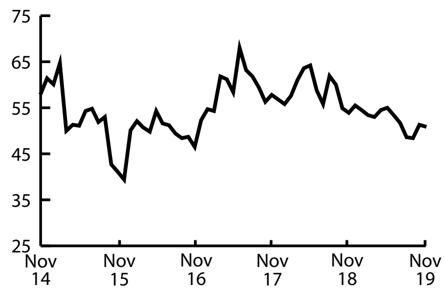


2018	Nov	0.5
	Dec	0.6
2019	Jan	0.2
	Feb	-0.1
	Mar	-0.1
	Apr	0.1
	May	0.7
	Jun	1.0
	Jul	0.5
	Aug	1.1
	Sep	1.7
	Oct	1.2
	Nov	0.2

% Chg From Month Ago -81.5
Year Ago -54.8

Source: The Federal Reserve Bank of Philadelphia, 2019

Purchasing Managers' Index

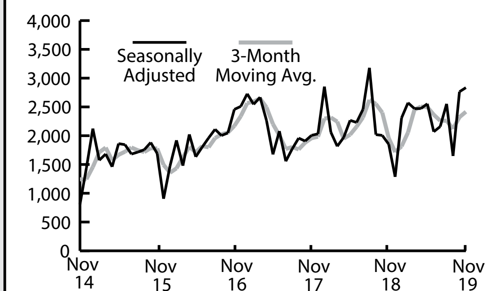


2018	Nov	53.9
	Dec	55.5
2019	Jan	54.5
	Feb	53.4
	Mar	53.0
	Apr	54.5
	May	55.0
	Jun	53.4
	Jul	51.7
	Aug	48.6
	Sep	48.4
	Oct	51.3
	Nov	50.9

% Chg From Month Ago -0.8
Year Ago -5.6

Source: Creighton University, Mid-America Survey of Business Conditions, 2019

Residential Building Permits



seasonally adjusted

2019	Jun	2,069
	Jul	2,158
	Aug	2,553
	Sep	1,648
	Oct	2,764
	Nov	2,835

% Chg From Month Ago 2.6

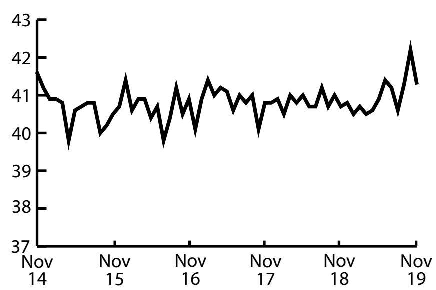
unadjusted

2018	Nov	1,787
2019	Nov	2,651

% Chg From Year Ago 48.3

Source: Residential Building Permits, Census Bureau, U.S. Department of Commerce, 2019

Average Weekly Manufacturing Hours



seasonally adjusted

2019	Jun	41.4
	Jul	41.2
	Aug	40.6
	Sep	41.3
	Oct	42.2
	Nov	41.3

% Chg From Month Ago -2.3

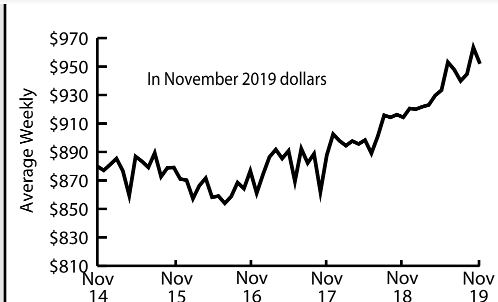
unadjusted

2018	Nov	40.8
2019	Nov	41.3

% Chg From Year Ago 1.2

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

Manufacturing Earnings



seasonally adjusted

2019	Jun	953.07
	Jul	947.84
	Aug	939.92
	Sep	944.71
	Oct	963.44
	Nov	952.36

% Chg From Month Ago -1.2

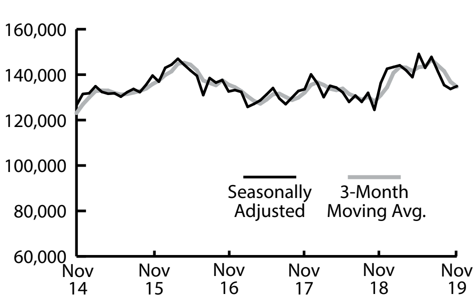
unadjusted

2018	Nov	917.40
2019	Nov	955.27

% Chg From Year Ago 4.1

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

Online Help-Wanted Advertising

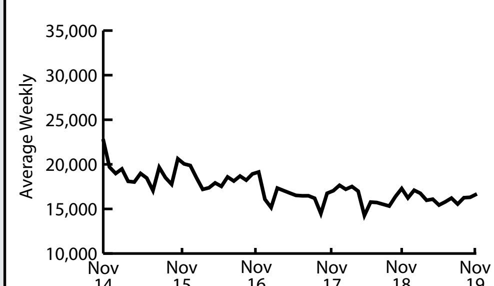


2018	Nov	136,300
	Dec	142,600
2019	Jan	143,350
	Feb	144,100
	Mar	141,900
	Apr	138,900
	May	149,100
	Jun	143,000
	Jul	147,800
	Aug	141,500
	Sep	135,400
	Oct	133,700
	Nov	134,900

% Chg From Month Ago 0.9
Year Ago -1.0

Source: The Conference Board Inc., 2019

Initial UB Claimants



seasonally adjusted

2019	Jun	15,792
	Jul	16,214
	Aug	15,543
	Sep	16,256
	Oct	16,302
	Nov	16,649

% Chg From Month Ago 2.1

unadjusted

2018	Nov	28,166
2019	Nov	26,877

% Chg From Year Ago -4.6

Source: Department of Employment and Economic Development, Unemployment Insurance Program, 2019

Minnesota Employment Review

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.lmi@state.mn.us
Internet :
mn.gov/deed/lmi

Labor Market Information
Help Line:
651.259.7384

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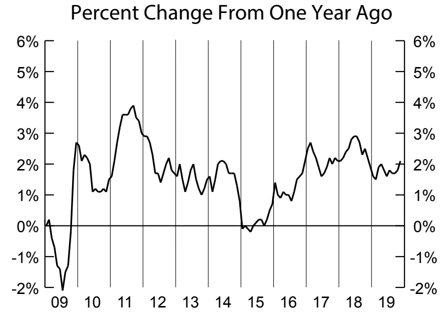
U.S. Consumer Price Index for All Urban Consumers (CPI-U)

The Consumer Price Index for All Urban Consumers (CPI-U) rose 0.3 percent in November on a seasonally adjusted basis, after rising 0.4 percent in October, the U.S. Bureau of Labor Statistics reported today. Over the last 12 months, the all items index increased 2.1 percent before seasonal adjustment.

Percent Change From One Year Ago



Increases in the shelter and energy indices were major factors in the seasonally adjusted monthly increase of the all items index. Increases in the indices for medical care, for recreation, and for food also contributed to the overall increase.

The all items index increased 2.1 percent for the 12 months ending November, a larger rise than the 1.8-percent increase for the period ending October.

www.bls.gov/cpi/

For more information on the U.S. CPI or the semi-annual Minneapolis-St. Paul CPI, call: 651.259.7384 or toll free 1.888.234.1114.

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EMPLOYMENT AND ECONOMIC DEVELOPMENT

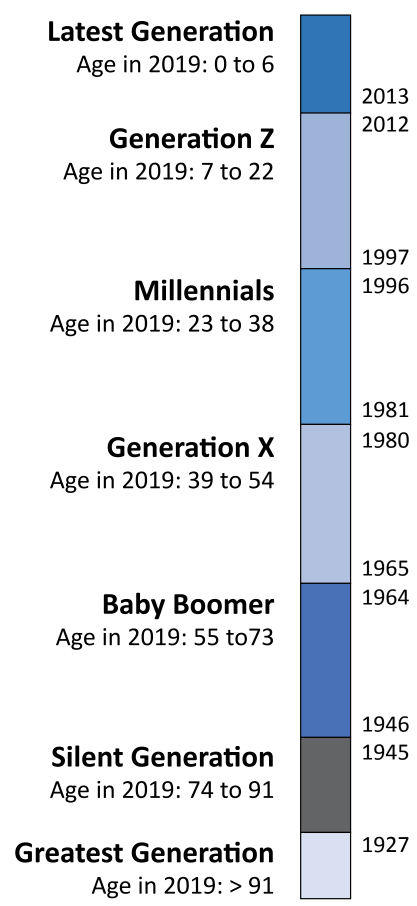
Relative Wages Across Generations

As Millennials have moved into the workforce over the last two decades, comparison to prior generations have become common. Education attainment, marriage status, employment, earnings, wealth, and spending habits have all been examined to gauge how Millennials have been faring compared to older generations.[1]

Many of the generational comparisons reach conflicting conclusions primarily because there are several key variables to account for over time, in particular changing household size and cost of living. Accounting for relative changes in housing cost, higher education costs, and health care cost are particularly challenging. This article doesn't attempt to settle the "things were better in the old days" debate. Instead the U.S. Census Bureau's Quarterly Workforce Indicator (QWI) data are used to give a broader view of how the distribution of employment and wage payments across age groups have shifted with the changing of generations.

Generation boundary dates used here are displayed in Figure 1 as generation definitions often vary.[2] Based on these definitions Minnesota's 2018 generation labor force mix was 7 percent for Generation Z, 32 percent for Millennials, 35 percent for Generation X, 24 percent for Baby Boomers, and 2 percent for the Silent Generation and a handful of Greatest Generation individuals still holding down jobs.[3] Baby Boomers made up the bulk of the workforce in the 1990s and early 2000s as they reached their peak labor force participation rates and also as a result of their numbers being larger than the generations before and after them, the Silent and X generations (see Figure 2).

Generation Timeline



[1]Recent intergenerational comparisons include: Millennial life: How young adulthood today compares with prior generations, Pew Research Center - www.pewsocialtrends.org/essay/millennial-life-how-young-adulthood-today-compares-with-prior-generations/ and Are Millennials Different?, Federal Reserve Board - www.federalreserve.gov/econres/feds/files/2018080pap.pdf.
[2]The generation dates used here are based on the Pew Research Center work cited in footnote 1.
[3]Annual labor force statistics are published in five-year age brackets which prevents precise generation of labor force and other labor market estimates from being established.

Generation X replaced Baby Boomers as the leading source of workers around 2010 as they reached peak labor force participation years, and the oldest Baby Boomers started to retire. Generation X's time as the top provider of workers will soon be over as the youngest Millennials reach their top labor force participation years (35 – 55 years old). Some studies which use early birth dates for Millennials already show Millennials as the largest generation in the labor force in Minnesota.

Baby Boomers' share of the workforce will continue to slip, but this generation will remain a source of workers longer than the Silent Generation as more Baby Boomers are delaying retirement compared to their parents. Future labor force participation as projected by the Bureau of Labor Statistics predicts participation rates for 65 to 74 years old to climb to 32.5 percent in 2028 from 27.0 in 2018 and to 12.1 from 8.7 percent for 75 years and older.[4]

Three generations – Generation Z, Millennials, and the Silent Generation – currently receive a smaller slice of the state's total wage and salary payments relative to their slice of the employment pie. Millennials captured roughly 28 percent of Minnesota wage and salary payment in 2017 but accounted for 34 percent of employment. The disparity between pay and employment is highest for Generation Z as they held 6 percent of jobs in 2018 but received only 1.3 percent of wage and salary payments. The Silent Generation held 1.7 percent of all employment and in turn received 1.3 percent of wage payments (Figure 3).

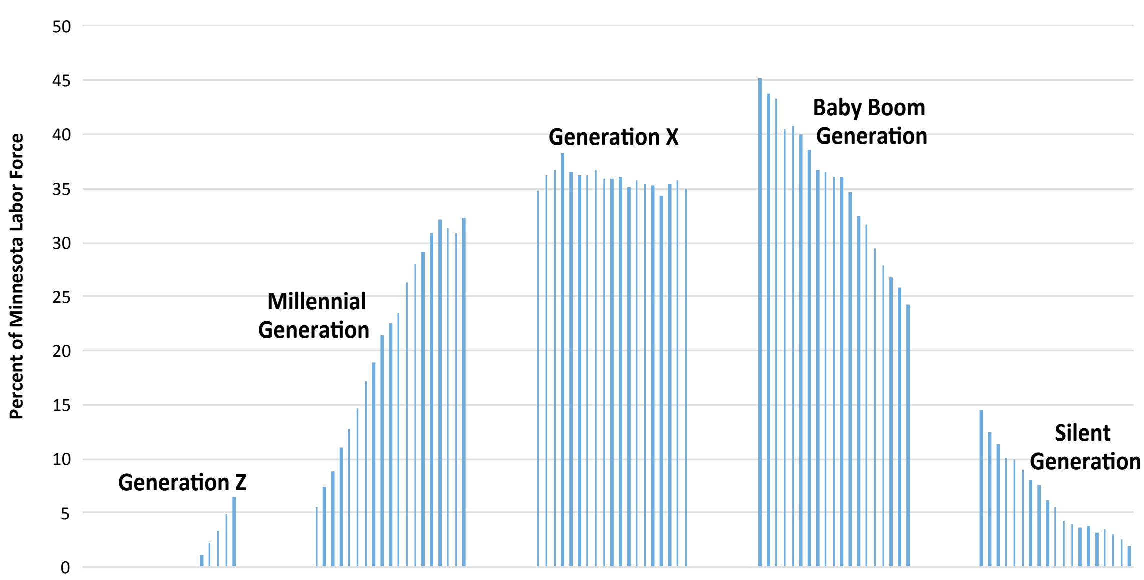
Most of the disparity in employment and wage and salary payments percentages is a function of how the pay scale and hours worked varies across age groups. Wages and salaries tend to increase as workers age and their skills and experience levels increase. Hours worked also increase with age before tailing off near retirement age. Older and younger workers are more likely to hold part-time jobs than other age groups.

Generation X didn't achieve a higher share of wage and salary payments than employment share until 2005 when the oldest Xers reached 40. As more Generation X workers reached their peak earnings years (late 40s to early 50s) over the last decade, wage and salary payments shares have increased relative to employment shares. Baby Boomers still receive a higher share of the state's wage and salary pie than their slice of the employment pie, but the gap has been shrinking over the last decade as most Baby Boomers have passed their peak earnings years and their wages have either stagnated or decreased relative to younger workers.

Figure 4 displays quarterly private sector wage and salary payments in Minnesota between 1995 and 2018 by age groups. Minnesota's 2.5 million private sector wage and salary employees received roughly $35 billion in wages and salary during the second quarter of 2018.

Almost a third of the $35 billion went to 45 – 54 year old workers. Younger (14 – 24 year olds) and older (65 years

Figure 2. Minnesota Percent of Labor Force by Generations, 1999-2017



Source: Current Population Survey - States: Employment status of the civilian noninstitutional population by sex, race, Hispanic or Latino ethnicity, marital status, and detailed age, 1999 - 2017 annual averages. www.bls.gov/lau/ex14tables.htm

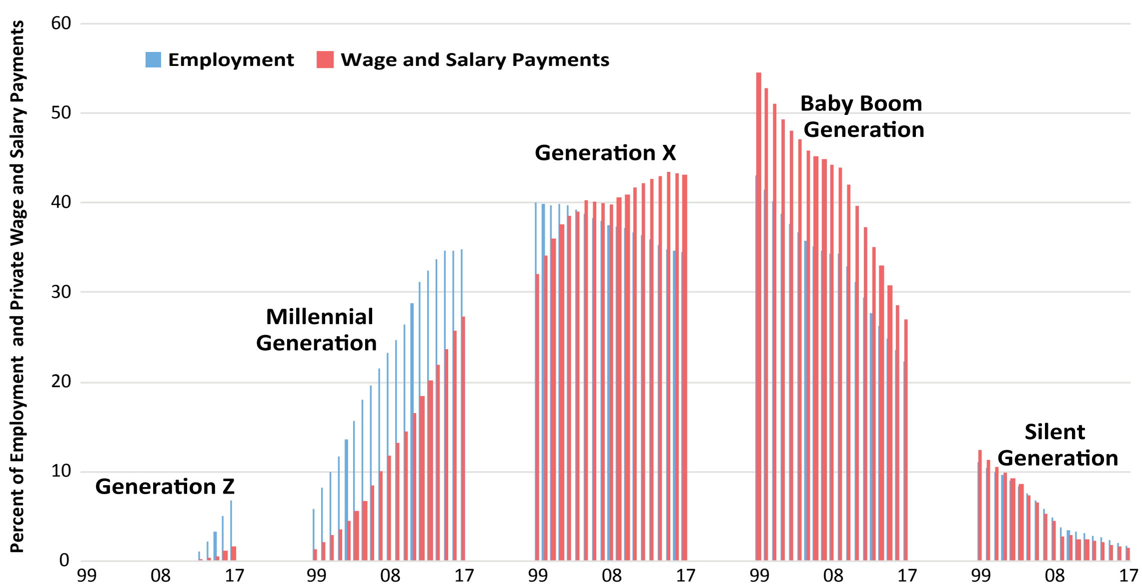
[4]2028 labor force projections by age are available at www.bls.gov/emp/tables/civilian-labor-force-participation-rate.htm.

and older) workers received 5.2 and 4.2 percent of the state's private sector wages and salary payments. Less employment, lower wages, and shorter hours worked add up to smaller slices the of wage and salary pie for younger and older workers. The magnitude of the wage payment decline around the Great Recession by age groups is detailed in Figure 4. The least affected age groups were the 55 – 64 year olds and 65 years and older workers. Their combined wage payments show the smallest drops percentage-wise from 2008 to 2010.

The movement of the Baby Boomer generation through the labor force in terms of share of wages received is highlighted by the peak in wage share received by 45 - 54 years old workers around 2008. The middle of the Baby Boomers turned 50 around then, reaching their peak labor force participation years.

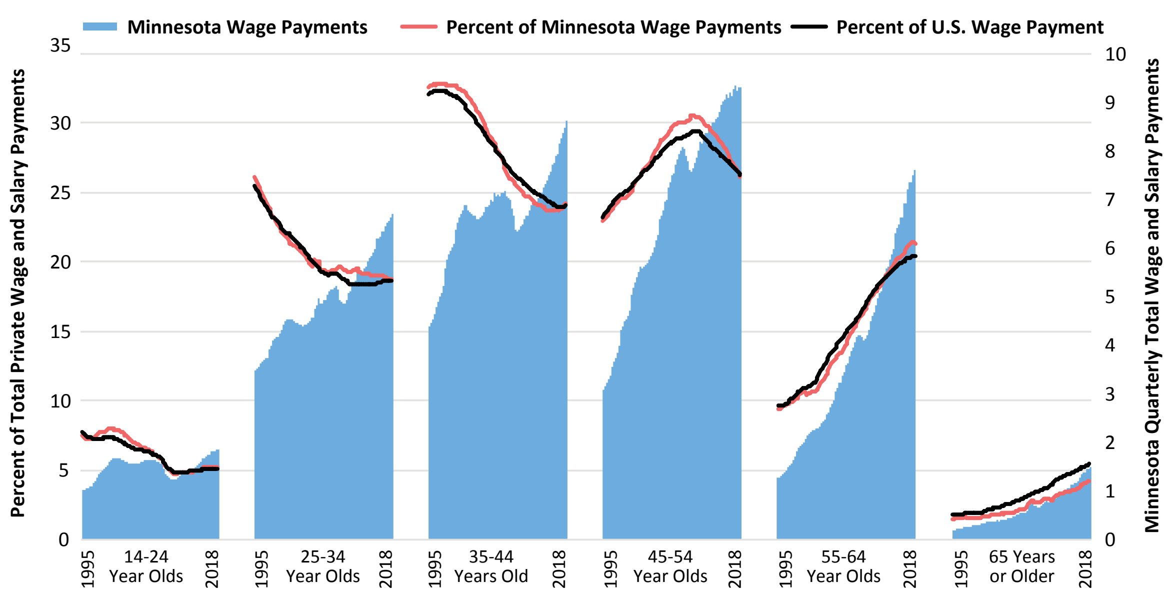
Minnesota's labor force as well as the U.S. labor force has continued to age over the last decade as shown by the increasing share of wage payments received by workers

Figure 3. Percent of Employment and Wage and Salary Payments by Generation



Source: Quarterly Workforce Indicators - https://qwiexplorer.ces.census.gov/static/explore.html#x=0&g=0, U.S. Census.

Figure 4. Minnesota Private Wage and Salary Payments by Age Quarterly Totals, 1995-2018



Source: Total Quarterly Private Wage and Salary Payments from Quarterly Workforce Indicators (QWI).

older than 55 years. Minnesota's wage payment shares by age groups for the most part have mirrored national trends as Minnesota's age structure is similar to that of the U.S. The one noticeable difference is that 65 years and older workers in Minnesota are receiving a smaller share of wage payments than nationally. That may be the result of older Minnesota's being better positioned to retire than fellow senior citizens across the nation.

Underlying the trends shown in Figures 3 and 4 are wage and salary variation across age groups. Average monthly wage and salary payments for 19 – 21 year old workers in 2018 were $1,026 or $14,500 annually, while average monthly wage and salary payments for 45- 54 year old workers were $5,830 or $70,000 annually. The overall average monthly wage across all workers was $4,440 or $53,300. Thus 19 – 21 year old workers' average monthly wage in 2018 was roughly 73 percent lower than the average overall monthly wage while the average monthly wage for 45 – 54 year old workers was 30 percent higher than the overall average (see Figure 5).

Relative median hourly wages are also reported in Figure 5 across age groups.[5] The overall median wage in the fourth quarter 2018 was $20.20. The median hourly wage for 19- 21 year old workers was $12.66 or 37 percent below the overall median. The median hourly wage for 45 – 54 year old workers was $26.12 or 29 percent higher than the overall median wage.

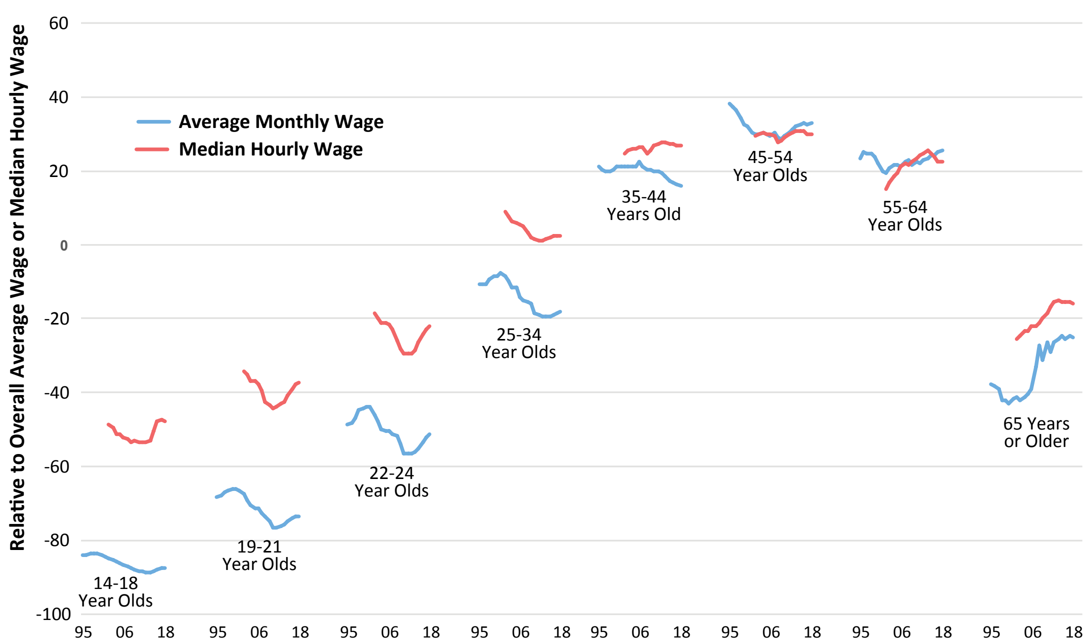
Both wage measures show the same trend over the last two decades. Relative wages for the three youngest age groups declined from the mid-90s right through the Great Recession but have been climbing since. Relative wages for 24 – 34 year old workers also tailed off from 1995 to 2009 but have been flat over the last decade. Relative wages haven't changed all that much for the three age groups that include 35 – 64 year olds.

The only age group of workers to show a sustained relative wage gain has been 65 years or older workers. That likely reflects more educated and higher paid Baby Boomers replacing their parents in the 65 years or older workforce. Workers younger than Baby Boomers are more educated as a group than Baby Boomers but have not seen their relative wages increase until recently.

The wage data linked to age groups and examined over time here point to younger generations receiving lower wages relative to overall wages for most of the past two decades. Relative wages have been improving recently but still have some ways to go before reaching the same relative wages that younger workers were paid 20 years ago.

by Dave Senf

Figure 5. Minnesota Average Monthly Wage and Median Wage by Age Group Relative to Overall Average/Median Wage, 1995-2018



Source: Quarterly Workforce Inclinators(QWI) - https://qwiexplorer.ces.census.gov/static/explore.html#x=0&g=0 and Quarterly Economic Demographics (QED) - https://mn.gov/deed/data/data-tools/qed/

[5]Median hourly wage data are available at https://mn.gov/deed/data/data-tools/qed/.

Minnesota Industry Snapshot

NAICS 33311 Agricultural Implement Manufacturing

Agriculture holds a cultural importance here in Minnesota as well as in NAICS 333, and although it makes up a fairly small portion of the economy, Minnesota is still the 5th most agriculturally productive state according to the USDA. However, Minnesota's agriculture could not operate without the tools provided by the Agricultural Implement Manufacturing industry. The Census Bureau defines this industry as consisting of, "establishments primarily engaged in manufacturing farm machinery and equipment, powered mowing equipment, and other powered home lawn and garden equipment." This useful and entirely privately owned industry was comprised of 105 establishments and supported 4,009 jobs, with an average of 38 jobs per establishment as of Quarter 2, 2019. It was also reasonably well paying, with an average weekly wage of $1,099.

The industry is mostly comprised of Farm Machinery and Equipment Manufacturing (333111), which made up 71% of the jobs and 88.6% of the establishments as of Q2, 2019. The remainder of the industry consists of Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing (333112). The later subindustry tends to have larger facilities, with an average of approximately 96 employees per establishment. In comparison, Farm Machinery and Equipment Manufacturing has an average of only about 31 employees per establishment. Over the past few years, average wages have tended to be pretty similar between these two subindustries, though they are often slightly higher in Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing.

Since the second quarter of 2016, the number of establishments and jobs have changed little in Agricultural Implement Manufacturing, and the same can be said of its subindustries. This can be seen in the table below. Wages, however, are another story. Between Q2 2016 and Q2 2019, industry wages grew by a total of 15.3%, while wages in farm machinery manufacturing and garden equipment manufacturing grew by 17.4% and 10% respectively. This greatly exceeds the rate of inflation, which was approximately 4.7% over this time period, indicating that workers are seeing real increases in their take-home pay.

Agricultural Implement Manufacturing

Sub-Industry	Quarter 2, 2019			Percent Change Since Q2, 2016		
	Employment	Establishments	Average Weekly Wages	Employment	Establishments	Average Weekly Wages
Agricultural Implement Manufacturing NAICS 33311	4,009	105	$1,099	-2.4%	-0.9%	15.3%
Farm Machinery and Equipment Manufacturing NAICS 333111	2,858	93	$1,091	-3.7%	-1.1%	17.4%
Lawn and Garden Tractor and Home Lawn and Garden Equipment Manufacturing NAICS 333112	1,151	12	$1,120	1.1%	0.0%	10.0%

EMPLOYMENT AND ECONOMIC DEVELOPMENT

Minnesota Industry Snapshot

NAICS 316

Leather and Allied Product Manufacturing

According to the Census Bureau establishments in this subsector manufacture leather and leather substitutes, and fabricate these into final products. Examples of leather substitutes include "rubber plastics, or textiles" used in products such as "rubber footwear, textile luggage, and plastics purses or wallets", but would exclude apparel. Leather and Allied Product Manufacturing is a small, growing, and entirely privately owned sector, with 1,193 jobs in 21 establishments or about 57 jobs per establishment as of Q2 2019. It is a moderately well-paying industry, with an average weekly wage of $1,068 in 2018.

The industry has only one subdivision: Leather and Hide Tanning and Finishing (3161), which in Q2 2019 had 295 jobs and four establishments, collectively making up less than a quarter of the leather industry in Minnesota. The number of establishments in this subindustry has not changed since before 2016.

Leather and Allied Product Manufacturing has grown significantly in the past few years. As can be seen in the table below, between Q2 of 2016 and Q2 of 2019, the number of establishments in Minnesota has grown 10.5% (though this is a change of only two additional establishments) while employment has grown 8.6%. By comparison, the scale of the tanning subindustry has changed little over this time period. The most dramatic growth has been in average weekly wages, which more than doubled for Leather and Allied Product Manufacturing. This is primary caused, however, by establishments being reclassified in the first half of 2019 and does not represent a real economic change in the industry. Weekly wages also increased by 27.9% for Leather and Hide Tanning and Finishing, although it should be noted that these wages have increased and decreased several times over the last few years. Both of these pay increases far outstrip the total cumulative inflation rate between Q2 of 2016 and Q2 of 2019, which was about 4.7% for urban or clerical workers in the Midwest.

Trends in Leather and Allied Product Manufacturing

	Quarter 2, 2019			Percent Change since Q2, 2016		
Sub-Industry	Employment	Establishments	Average Weekly Wages	Employment	Establishments	Average Weekly Wages
Leather and Allied Product Manufacturing NAICS 316	1,193	21	$1,672	8.6%	10.5%	101.0%
Leather and Hide Tanning and Finishing NAICS 3161	295	4	$1,151	-4.2%	0.0%	27.9%

Minnesota Industry Snapshot

NAICS 533

Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)

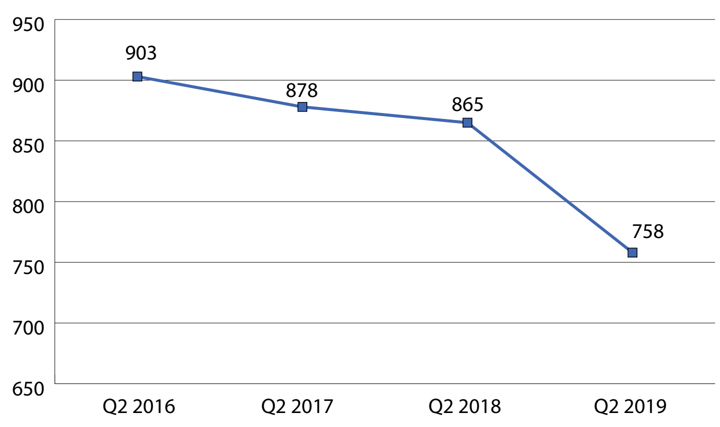
In addition to discussing trends in the major industries, it is also important to draw attention to parts of the economy that are less well known. One such sectors is Lessors of Nonfinancial Intangible Assets (except Copyrighted Works). Although its name isn't very instructive about what it involves, "Industries in the Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) subsector include establishments primarily engaged in assigning rights to assets, such as patents, trademarks, brand names, and/or franchise agreements, for which a royalty payment or licensing fee is paid to the asset holder. Establishments in this subsector own the patents, trademarks, and/or franchise agreements that they allow others to use or reproduce for a fee and may or may not have created those assets." (The definition isn't very instructive either.) This industry is small and exclusively privately owned. With 758 jobs and 86 establishments in Minnesota in Q2 2019, it tends to have a small number of employees per establishment. It tends to be pretty high paying, with an average weekly wage of $1,801, which translates to an annual income of over $93,000 a year.

Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)

	Employment	Establishments	Average Employees per Establishment	Average Weekly Wages
% change from Q2 2016 to Q2 2019	-16.1%	14.7%	-26.8%	7.1%
Q2 2019	758	86	8.8	$1,801
Q2 2018	865	78	11.1	$1,776
Q2 2017	878	75	11.7	$1,851
Q2 2016	903	75	12.0	$1,681

As can be seen in the graph below, employment in this industry in Minnesota has declined in recent years. In spite of this, the number of establishments has paradoxically grown by 14.7% while average wages have grown by 7.1%, which is a few points more than inflation for the Midwest.

Employment Over Time



Minnesota Industry Snapshot

NAICS 551 Management of Companies and Enterprises

Firms in every industry of Minnesota's economy need to be managed in some form. However, the managing of businesses and other organizations can be thought of an industry in and of itself, and Management of Companies and Enterprises represents just this. The Census Bureau defines this as, "Industries in the Management of Companies and Enterprises subsector include three main types of establishments: (1) those that hold the securities of (or other equity interests in) companies and enterprises; (2) those (except government establishments) that administer, oversee, and manage other establishments of the company or enterprise but do not hold the securities of these establishments; and (3) those that both administer, oversee, and manage other establishments of the company or enterprise and hold the securities of (or other equity interests in) these establishments. Those establishments that administer, oversee, and manage normally undertake the strategic or organizational planning and decision-making role of the company or enterprise." This private industry is large, with 1,585 establishments. Its 89,359 jobs represent almost 3% of all employment in Minnesota. It is also very high paying, with an average weekly pay of $2,564. However, it should be noted that pay appears to experience a great deal of seasonality, being at least 20% higher in Quarter 1 than it is during the rest of the year. This may also be when most bonuses are paid in this industry.

Although it has three sub-industries, almost 98% of the industry's employment and about 85% of its establishments can be found in just one of them, Corporate, Subsidiary, and Regional Managing Offices (551114). This sub-industry consists of establishments of type 2 in the definition given above.

The industry has experienced significant growth in recent years, expanding employment and establishments by 13.9% and 18.3% respectively between Q2 2016 and Q2 2019. This is mostly caused, however, by non-economic reclassification of establishments which occurred in the first quarter of 2019. All the change in employment, and most of the change in establishments is attributable to Corporate, Subsidiary, and Regional Managing Offices. Employment in Offices of Bank Holding Companies (551111) in Minnesota has declined by more than a third over this timespan. Wages in the industry have also increased significantly during this time. However, as mentioned previously, wages in this industry go up and down a great deal from quarter to quarter, and comparing the yearly averages between 2015 and 2018 shows only an approximately 5% increase in average weekly pay, which is close to the cumulative rate of inflation over this time period.

Management of Companies and Enterprises

	Quarter 2, 2019			Percent Change since Q2, 2016		
	Employment	Establishments	Average Weekly Wages	Employment	Establishments	Average Weekly Wages
Management of Companies and Enterprises (551)	89,359	1,585	$2,564	13.9%	18.3%	18.2%
Offices of Bank Holding Companies (551111)	268	22	$2,677	-33.8%	-21.4%	28.2%
Offices of Other Holding Companies (551112)	1,678	216	$2,374	-0.1%	20.0%	1.3%
Corporate, Subsidiary, and Regional Managing Offices (551114)	87,412	1,347	$2,567	14.5%	19.0%	18.5%

by James Spector-Bishop