

In the Midst of Change

New Population Statistics for the Twin Cities

Far and away, Employment Review makes the most use of the Department of Employment and Economic Development's (DEED) employment and unemployment statistics. These statistics are housed in a number of different tools, including the Current Employment Statistics, Quarterly Census of Employment and Wages, Occupational Employment Statistics, and Local Area Unemployment Statistics. Using these tools in concert with one another can provide for an understanding of local and state level job markets. To gain a more complete picture, however, one must also understand a region's population and labor force. Much of this information

is gathered and published outside of DEED's resources, including the U.S. Census Bureau's American Community Survey (ACS). The following will highlight ACS data in the Twin Cities Seven-County Metro Area.

The American Community Survey

The U.S. Census Bureau has collected population statistics every year since 1790, as required by the U.S. Constitution. Beyond just a basic count of people, the census was created in order to "enable future legislators to adapt the public measures to the particular circumstances of the community."¹ In the 20th century the questions were

divided between a "short" and "long" form, with only a subset of the population required to complete the long form. After 2000, the long form became the ACS, which continues to survey local areas on demographic, housing, social, and economic data every year. As with the creation of the census in 1790, the ACS is intended to provide timely population and labor force data, in order to bolster further understanding of local areas for government agencies, businesses, nonprofit organizations, community groups, emergency planners, educators, journalists, and the public.²

The ACS is conducted on a rolling basis. Each year, about one in 38 households receives

Feature:

LRT and
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¹Summary of debate on Census Bill, House of Representatives, 25-26 Jan., 2 Feb. 1790 (*The Founders' Constitution*, 1987, University of Chicago, Volume 2, Article 1, Section 2, Clause 3, Document 19).

²United States Census Bureau. *American Community Survey: Information Guide*. April 2013.

an invitation to participate in the survey, which may be completed by individuals online or in paper form. All in all, approximately 295,000 addresses are contacted to participate in the survey each month. Once collected, information from the ACS is released in both one-year and five-year estimates. One-year estimates, while the most current data, include only those areas with populations of 65,000 or more people. Five-year estimates, while not as current, are more reliable and include data for all local areas.

As recently as December 3, 2015, the U.S. Census Bureau released updated 2010-2014 five-year estimates. While newly-released data are noteworthy in themselves, this is the first time in the ACS's history that 5-year estimates do not overlap. This provides a unique opportunity to analyze population and labor force trends for all local areas over time.³

Where is Growth Happening?

As of 2014, the Twin Cities metro had a population of 2,294,604 people who were 16 years of age and older, making up 54.0 percent of Minnesota's total.⁴ Over the course of the 2009 to 2014 estimates, this population increased by nearly 115,000 people, a 5.3 percent increase (see Table 1). As such, the Twin Cities' grew at a faster clip than the state as a whole, which saw a 4.2 percent increase in its population.

Overall, between 2009 and 2014 the largest-growing county was Hennepin County, which gained nearly 42,000 people. This should come as of no surprise as 41.2 percent of the metro's total population lives in Hennepin County. What is surprising is that the next largest-growing county is Washington County, which gained over 17,200 people between 2009 and 2014. Washington County makes up 8.2 percent of the metro's total

population. As such, Washington County was the fastest-growing county between 2009 and 2014 with 10.0 percent growth. Other fast-growing counties included Scott County and Carver County, both of which grew at rates of 7.9 percent. Ramsey County was the slowest-growing metro county, with its 4.1 percent rate of growth just shy of the state's 4.2 percent (see Table 2).

At the city level nearly half (48.4 percent) of the metro's total population growth between 2009 and 2014 occurred in just 10 cities. This is remarkable when one considers there are 140 cities in the Seven-County Metro Area. Not surprisingly, Minneapolis and St. Paul lead the pack with 12,401 people added and 9,579 people added, respectively. Together, these two cities accounted for roughly one-fifth (19.1 percent) of total metro growth between 2009 and 2014. While accounting for significant metro growth, Minneapolis' growth rate of 4.0

Table 1: Metro Population Trends, 2009-2014

Subject	2014 Population	2009 – 2014 Population Change	
		Numeric	Percent
Total Population, 16 Years+	2,294,604	114,888	5.3%
Age			
16 to 19 Years	153,373	484	0.3%
20 to 24 Years	188,933	3,318	1.8%
25 to 44 Years	828,142	-9,679	-1.2%
45 to 54 Years	434,596	2,721	0.6%
55 to 64 Years	353,657	68,121	23.9%
65 to 74 Years	186,226	40,151	27.5%
75 Years and Over	149,677	9,772	7.0%
Race and Ethnicity			
White	1,877,410	26,751	1.4%
Black or African American	173,946	36,982	27.0%
Native American	13,219	-292	-2.2%
Asian	145,422	33,984	30.5%
Native Hawaiian and Other Pacific Islander	1,045	-69	-6.2%
Some Other Race	38,377	1,192	3.2%
Two or More Races	45,185	16,340	56.6%
Hispanic or Latino Origin	112,803	23,143	25.8%

Source: U.S. Census Bureau, American Community Survey

³For the purposes of brevity, 2005-2009 five-year estimates and 2010-2014 five-year estimates will be referred to as 2009 and 2014 estimates, respectively.

⁴All references to population will refer to the population 16 years of age and older unless specified otherwise.

percent and St. Paul’s growth rate of 4.4 percent come in below the metro’s average of 5.3 percent.

Following Minneapolis and St. Paul are some surprising players. With an increase of 8,047 people, Woodbury grew by 20.1 percent, nearly four times faster than the metro area overall. Growing by 5,225 people and 4,404 people, respectively, both Brooklyn Park and Lakeville witnessed growth rates about twice that of the metro area.

Coming in at 6th place for numeric growth with 4,282 people added, Shakopee grew at a rate of 17.8 percent between 2009 and 2014. At 7th place for numeric growth with 3,120 people added, Bloomington remained the metro’s third –largest city. Finally, rounding out the top 10 largest-growing cities in the metro were Blaine, Edina, and Maplewood.⁵

An Aging Population

Broken down by age, it’s clear the Twin Cities metro is getting older. In 2009 the 55-64 and 65 years and over age groups each made up 13.1 percent of the total population. By 2014 the 55-64 year age group expanded to include 15.4 percent of the total population, while the 65 years and over group expanded to include 14.6 percent. As these older groups expanded, “prime-working age” groups shrank.⁶ In the metro area those between the ages of 25 and 44 years transitioned from making up 38.4 percent of the total population in

2009 to making up 36.1 percent in 2014 (see Chart 1).

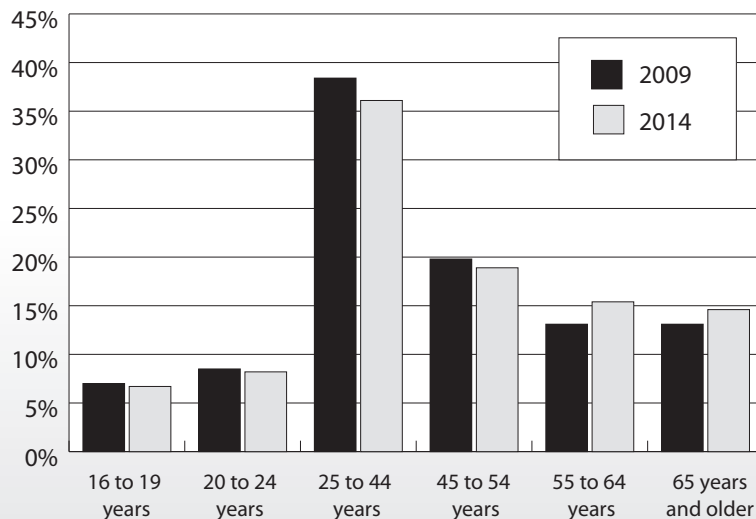
While these adjustments in the Twin Cities’ population seem marginal at first glance, they translate to a significant aging of the population. For example, the 55-64 year age group added over 68,000 people between 2009 and 2014, growing by nearly 24 percent. Those 65 years of age and older added nearly 50,000 people, with a growth rate over three times that of the total population. Meanwhile, no younger age group witnessed growth rates above 2 percent, with the 25-44 year age group actually declining by nearly 10,000 people.

Hennepin County gained the most

people 65 years of age and older between 2009 and 2014, followed by Dakota County and Washington County. Growing by 41.6 percent, this age group grew the fastest in Washington County, followed by 36.7 percent in Scott County and 35.9 percent in Dakota County. At the other end of the spectrum, Ramsey County’s population 65 years of age and older grew by only 1.1 percent (see Table 2).

Zooming in, those cities gaining the most people 65 years of age and older between 2009 and 2014 included Woodbury, Minneapolis, Plymouth, Eagan, Maple Grove, Brooklyn Park, Blaine, and Burnsville.

Chart 1: Twin Cities Age Distribution, 2009-2014



Source: 2005-2009 and 2010-2014 American Community Survey

Table 2: County Age Trends, 2009-2014

County	Total Population Change		Population 65+	
	Numeric	Percent	Numeric	Percent
Anoka	10,781	4.3%	7,907	27.8%
Carver	5,165	7.9%	1,693	24.4%
Dakota	16,179	5.4%	11,872	35.9%
Hennepin	41,891	4.6%	16,193	13.0%
Ramsey	16,362	4.1%	714	1.1%
Scott	7,302	7.9%	3,126	36.7%
Washington	17,208	10.0%	8,391	41.6%

Source: U.S. Census Bureau, American Community Survey

⁵The city of Rogers gained 3,477 people between 2009 and 2014, growing by 68.9 percent. While this would certainly put Rogers in the top-ten growing metro cities, much of this growth was attributable to the annexation of Hassan Township in 2012.

⁶Those between the ages of 25 and 54 are considered to be a part of the prime working age group, as they typically have the highest labor force participation rates.

Increasing Diversity

Broken down by race and ethnicity, it's apparent the Twin Cities metro is becoming more diverse. The black population grew the most between 2009 and 2014, adding nearly 37,000 people, with a growth rate of 27.0 percent. Close behind, the Asian population added nearly 34,000 people, with a growth rate of 30.5 percent. Those reporting Hispanic or Latino origin grew by over 23,000 people, with a growth rate of 25.8 percent. In contrast to rapid growth among the black, Asian, and Hispanic or Latino populations, the white population barely broke 1 percent growth in the metro between 2009 and 2014.

Black and African American Population

Digging into the demographics by county, Hennepin County's black population grew by 18,268 people, increasing by 22.6 percent, and Ramsey County's black population grew by 9,533 people, increasing by 31.0 percent. Together, these two counties made up three-quarters of the total growth for the black population in the metro area. In terms of percentage growth, Anoka County and Washington County witnessed very significant increases in their black populations, which grew by 45.1 percent and 43.7 percent, respectively.

Asian Population

Like the black population growth, the bulk of Asian growth was in Hennepin and Ramsey counties. Ramsey County's Asian population grew by 15,098 people, accounting for 44.4 percent of that population's growth in the metro. Hennepin County's Asian population grew by 12,534 people, contributing another 36.9 percent to that population's total metro growth. Washington County also witnessed an Asian population boom of 29.5%.

Native American Population

At the metro level the Native American population decreased by 2.2 percent between 2009 and 2014, equivalent to approximately 300 people. At the county level, much of this decline was in Hennepin, Ramsey, and Anoka counties. In contrast to these three counties, Washington County's Native American population climbed by 36.7 percent or about 200 people.

Identifying as another Race

Those people not identifying with listed racial groups may option as Some Other Race within the American Community Survey. After selecting this option, respondents may then write in a specific and/or unique race. Based on survey results, this population makes up roughly

2 percent of the total metro population or nearly 38,400 people. Trends among this population were much more sporadic throughout the metro region. On one end of the spectrum, Hennepin County shed 2,120 people reporting to be some other race, a 10.4 percent decline. Carver, Washington, and Ramsey counties also lost people reporting to be some other race, at 17.9 percent, 13.8 percent, and 4.8 percent respectively. On the other end of the spectrum, Dakota County gained 2,200 people reporting to be some other race, a 45.6 percent increase. This population also increased rapidly in Anoka County, growing by 49.2 percent or an estimated 1,200 people and in Scott County where a gain of 530 people equaled a growth of 70.3 percent.

Hispanic or Latino Ethnicity

When analyzing ethnicity, we find an estimated 112,800 people report having Hispanic or Latino origins in the metro area. While this population grew the most in Hennepin County, adding 8,136 people between 2009 and 2014, it grew the fastest in Dakota County. There, those reporting Hispanic or Latino origins grew by 50.4 percent, an increase of nearly 5,400 people (see Table 3). It should be noted that Hispanic or Latino origin can be viewed as the heritage, nationality, lineage, or country of birth of an individual, or the individual's parents

Table 3: Select County Minority Trends, 2009-2014

County	White		Black		Asian		Native American		Hispanic or Latino	
	Change	Percent	Change	Percent	Change	Percent	Change	Percent	Change	Percent
Anoka	3,873	1.7%	3,352	45.1%	1,124	12.9%	-105	-6.0%	2,556	46.3%
Carver	4,722	7.7%	44	6.6%	299	19.6%	24	21.1%	309	15.3%
Dakota	6,879	2.6%	3,077	28.8%	1,854	15.6%	-1	-0.1%	5,391	50.4%
Hennepin	5,572	0.8%	18,268	22.6%	12,534	26.7%	-314	-4.7%	8,136	18.6%
Ramsey	-10,965	-3.4%	9,533	31.0%	15,098	49.0%	-112	-4.4%	4,073	19.6%
Scott	4,162	5.0%	739	39.0%	995	21.8%	20	2.9%	923	30.8%
Washington	12,508	8.0%	1,969	43.7%	2,080	29.5%	196	36.7%	1,755	44.7%

Source: U.S. Census Bureau, American Community Survey

or ancestors, before arriving in the United States. People who identify as Hispanic, Latino, or Spanish may be any race.⁷ As such, percentages for the various race categories should not be combined with the percentage identifying as Hispanic or Latino.

A Shrinking Majority

There's no denying that the Twin Cities' population is predominantly white. As of 2014, 81.8 percent of the region's population identified as white within the ACS. While lower than the state's 87.4 percent identifying as white, this is higher than the U.S., where 75.4 percent identified as white. Despite making up over four-in-five metro area residents above the age of 16, white population growth between 2009 and 2014 accounted for only 23.3 percent of total growth during that time.

At the county level, Washington County led the metro area in white population growth, with an additional 12,500 residents between 2009 and 2014. While Carver and Scott counties joined Washington County in modest growth of their respective white populations, all other counties' white population growth lagged well behind their total growth rates (see Table 3).

At the city level, St. Paul led the metro area with nearly 17,000 additional minority residents between 2009 and 2014. This increase was more than enough to overcome the city's 4.7 percent decline in its white population. St. Paul's Asian population, which makes up about 14 percent of the city's total, expanded significantly between 2009 and 2014, adding 9,545 people for a 43.7 percent increase. Interestingly, while St. Paul's black population also makes up about 14 percent of the city's total, its population grew at a slower pace of 25.4 percent.

Close behind St. Paul, Minneapolis' minority population grew by nearly 13,500 people between 2009 and 2014. This growth also made up for the city's decreasing white population, which fell by 0.5 percent. Minneapolis' black population, which makes up about 16



percent of the total, was the largest-growing with an additional 5,200 people. Adding just over 5,000 people, those reporting two or more races grew by a remarkable 85 percent. This is an especially interesting trend, as those reporting two or more races only make up about 3 percent of the city's total population.

Other metro cities with large increases in minority populations include Brooklyn Park, Bloomington, Maplewood, Brooklyn Center, Shakopee, Eagan, and Woodbury. No metro city's minority population declined by more than 200 people between 2009 and 2014.

Table 4 (see page 6) highlights the top five growing cities in each metro county. Overall, while these 35 cities accounted for 57.3 percent of the metro's total population, they accounted for 77.3 percent of its growth between 2009 and 2014.

The Complete Picture

Reading Employment Review and utilizing DEED's employment resources in concert can reveal a lot about the Twin Cities' labor market. The region is large, accounting for three out of every five state jobs. It has a broad industry base with

healthy employment concentrations in health care, select manufacturing sectors, management, and professional and business services, among others. It has a nationally-ranked labor force participation rate, which hovers around 70 percent. The region is growing, averaging 26,400 jobs gained every year since the low of the recession in 2010, and this growth is anticipated to remain modest through the end of the decade. These employment statistics are nearly endless and can provide for a clear understanding of both the region's past and present.

As this article shows, however, there is another perspective to study: population. The newly-released American Community Survey data clearly outlines an aging, yet diversifying population in the Twin Cities metro. What impacts will these changes have upon the region's labor market? What industries and occupations will be impacted the most? How will the metro's seven counties and 140 cities continue to evolve? Utilize DEED's employment tools, check out the American Community Survey and stay tuned in with Employment Review to find out.

⁷Hispanic Origin. United States Census Bureau, Web. 14 Dec. 2015. www.census.gov/topics/population/hispanic-origin/about.html .

Table 4: Top-Growing Cities by County, 2009-2014

City	Total 16+ Population	Population Change		65+ Percent Growth	Minority Percent Growth
		Numeric	Percent		
Anoka County	262,119	10,781	4.3%	27.8%	29.5%
Blaine	45,427	2,911	6.8%	40.0%	13.3%
Columbia Heights	15,937	1,805	12.8%	-1.8%	71.1%
Andover	23,412	1,600	7.3%	65.5%	19.9%
Ramsey	18,679	1,457	8.5%	61.5%	88.9%
Lino Lakes	15,824	1,007	6.8%	56.9%	-14.2%
Carver County	70,237	5,165	7.9%	24.4%	12.4%
Waconia	8,122	1,240	18.0%	76.4%	-23.8%
Chanhassen	17,829	1,140	6.8%	56.9%	18.1%
Chaska	18,374	1,094	6.3%	20.8%	-8.2%
Carver	2,599	858	49.3%	33.7%	50.0%
Victoria	5,572	601	12.1%	-2.7%	138.5%
Dakota County	314,309	16,179	5.4%	35.9%	29.2%
Lakeville	42,102	4,404	11.7%	42.7%	30.7%
Farmington	15,523	2,449	18.7%	45.6%	14.0%
Eagan	51,089	2,155	4.4%	60.6%	32.3%
Rosemount	16,531	1,748	11.8%	54.7%	22.2%
Burnsville	48,681	1,521	3.2%	26.5%	22.8%
Hennepin County	946,185	41,891	4.6%	13.0%	21.5%
Minneapolis	322,431	12,401	4.0%	7.6%	16.8%
Brooklyn Park	57,483	5,225	10.0%	35.7%	23.2%
Rogers	8,525	3,477	68.9%	155.9%	114.0%
Bloomington	70,591	3,120	4.6%	7.9%	33.3%
Edina	38,578	2,759	7.7%	3.6%	43.2%
Ramsey County	413,165	16,362	4.1%	1.1%	35.2%
St. Paul	225,983	9,579	4.4%	-4.3%	28.3%
Maplewood	31,178	2,758	9.7%	-2.5%	67.4%
Roseville	29,029	1,442	5.2%	-4.1%	47.3%
North St. Paul	9,674	643	7.1%	-7.7%	25.1%
Shoreview	20,969	498	2.4%	20.3%	75.0%
Scott County	99,801	7,302	7.9%	36.7%	36.3%
Shakopee	28,286	4,282	17.8%	21.4%	56.6%
Jordan	4,144	1,529	58.5%	54.0%	-19.3%
Elko New Market	2,912	864	42.2%	59.0%	-56.8%
New Prague	5,391	805	17.6%	7.0%	-23.2%
Savage	20,531	679	3.4%	67.9%	18.9%
Washington County	188,788	17,208	10.0%	41.6%	30.8%
Woodbury	48,076	8,047	20.1%	62.7%	35.3%
Cottage Grove	26,213	1,801	7.4%	62.6%	17.7%
Hugo	10,404	1,415	15.7%	53.3%	32.8%
Lake Elmo	6,357	838	15.2%	82.8%	-42.9%
Scandia	3,403	699	25.9%	65.2%	206.9%

Source: U.S. Census Bureau, American Community Survey

by Tim O'Neill
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Minnesota's share of public employment is at its lowest level in at least 10 years with 13.6 percent of all covered employment found in federal, state, and local government. Typically the share of public sector employment swells during economic downturns as private sector employers shed jobs and the need for government services increases. During an economic expansionary period the inverse occurs. Minnesota exhibits a classic example of a changing share of jobs held by public sector employment as the economy swings. Government employment is primarily local government which has 70.8 percent of all government employment. State government has 20.8 percent, and federal employment is 8.4 percent of the total government employment figure. Local government is primarily education which accounts for just over 50 percent of its figure. Public Administration is second with just under 33 percent, and Healthcare and Social Assistance is third with just over 5 percent. These three cover just over 88 percent of local government employment.

From 2007 to 2010 Minnesota's private sector employment shed 128,013 jobs, dropping 5.5 percent while government employment remained relatively stable and increased by 2,998 or 0.8 percent. Government's share of total employment reached 14.6 percent in 2010, up from 13.8 percent leading into the downturn in 2007. The education sector was the largest contributor to public sector employment growth during the recession from an increase of 3,283 jobs or 2 percent. Declining private sector employment also increase the percent of the public sector's share.

Since the recession ended in 2010 government employment has declined by 1,886 jobs (0.5 percent) and remains at 372,051 jobs or 13.6 percent of covered employment in 2014. The largest losses in government jobs from 2010 to 2014 were found in the arts, entertainment, and recreation industry which shed some 1,892 jobs (16.8 percent). This industry includes jobs in government operated parks, museums, zoos, and casinos. Education employment stayed fairly steady since it is based on population.

Although Minnesota's economy is expanding and continues to add private sector jobs while decreasing the share of jobs in government, many counties don't follow suit.

- During the Recession (2007-2010): Carlton County's share of government employment increased 4.8 percentage points, more than any other county. Clearwater County's share of government employment experienced the largest decline, decreasing 2.9 percentage points during the recession. Carlton County has a casino, Clearwater County doesn't.

- Since the recession (2010-2014), Traverse County saw the largest decrease in the share of government employment, dropping a whopping 13.6 percentage points, while neighboring Big Stone County saw the largest gain at 3.4 percentage points.

Data Dive

DEED's Quarterly Census of Employment and Wages (QCEW) program provides specific information about what type of government employment your county has. QCEW uses a census of employers showing employment and wages that are covered under the Unemployment Insurance Program. Data are available by industry, ownership type, state, regions, counties, and minor civil divisions.

Using the QCEW program: <http://mn.gov/deed/>

To find the QCEW data tool from DEED's home page, select the gray data tab on the left side of the screen > in the dropdown select Data Tools > then select Quarterly Census of Employment and Wages to produce Minnesota All Ownerships and Private in the most recent year by supersector. To change the area or see more specific industries, click the "start over" link at the top right of the screen.

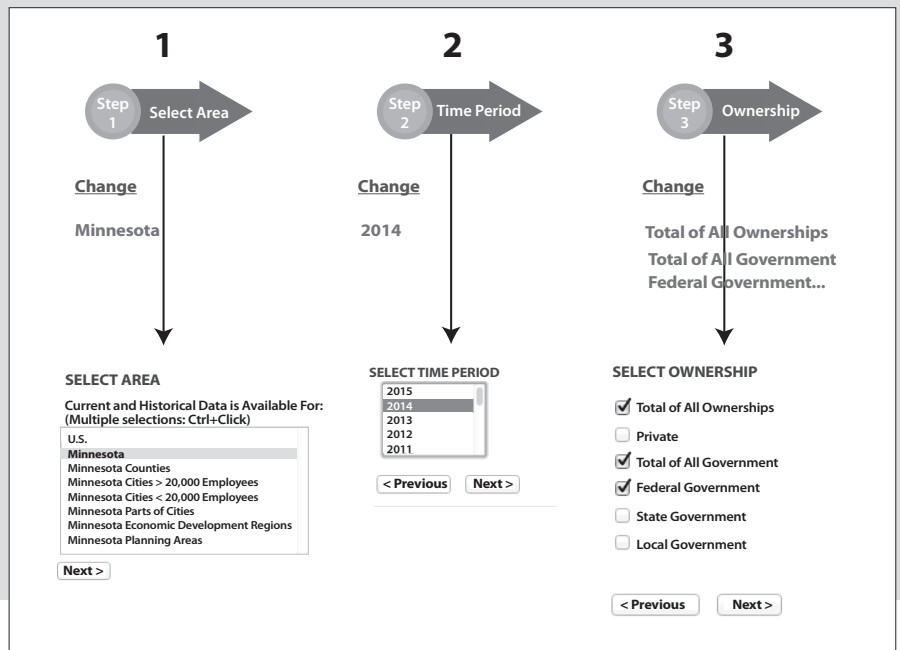
Navigating QCEW

1. Select Geography: The first selection defines the geography to be used. Holding the control button allows for multiple selections.

1b. Clicking next on an alphabetical list of the available cities, counties, and regions. Again, users can select multiple geographic regions by holding control while making selections.

2. Select Time Period: The next option sets the year of data. QCEW data typically take about six months to verify and clean errors before it can be published online, and data are available on DEED's website back to 2000. Selecting multiple years can allow for more nearly accurate time series analysis.

3. Select Ownership: Government employment, whether it is local, state, or federal, will be organized by industry according to the North American Industrial Classification (NAICS). For instance, employment for a city parks and



Fun With Statistics

recreation department would be classified under arts, entertainment, and recreation (NAICS 71). The public administration industry (NAICS 92) includes government employment such as courts, firefighting and police protection, and the administration for various agencies and departments.

4. Select Industry: Industry selections can be made by selecting all 11 supersector industries for broad categories, all 20 industry sectors, or by manually selecting specific industry subsectors to view the most detailed information available.

Unlike private employment which can be suppressed to protect the identity of employers, government employment does not need to be suppressed. This allows users to see very detailed industry subsector employment for even small geographies such as cities and towns.

To select industry subsectors click the plus symbol next to the industry to view subsectors.

More information about NAICS classifications can be found here: www.census.gov/cgi-bin/sssd/naics/naicsrch?chart=2012

Results are found in a table with employment (jobs) as the default. Other tabs include establishments, wages (total payroll), average weekly wages, and other business employment dynamic data.

Use annual average data to reduce the seasonal employment variation.

Below is a map showing the percent of government employment for each county

4

Step 4 Industry →

Step 5 View Results →

Change

Total, All Industries (000000)

Start Over

SELECT INDUSTRY

Enter industry codes, separated by commas

Or select industries by super sector or sector

Or select industries by checking the boxes below. Click on '+' to see all the industries in the group.

- 0000-Total, All Industries
- + 1011-Natural Resources and Mining
- + 1012-Construction
- + 1013-Manufacturing
- + 1021-Trade, Transportation, and Utilities
- + 1022-Information
- + 1023-Financial Activities
- + 1024-Professional and Business Services
- + 1025-Educational and Health Services
 - + 61-Educational Services
 - + 611-Educational Services
 - + 6111-Elementary and Secondary Schools
 - + 6112-Junior Colleges
 - + 6113-Colleges, Universities, and Professional Schools
 - + 6114-Business Schools and Computer and Management Training
 - + 6115-Technical and Trade Schools
 - + 6116-Other Schools and Instruction
 - + 6117-Educational and Support Services
 - + 62-Health Care and Social Assistance
 - + 1026-Leisure and Hospitality
 - + 1027-Other Services
 - + 1028-Public Administration
 - + 1029-Unclassified

< Previous Next >

Step 1 Select Area → Step 2 Time Period → Step 3 Ownership → Step 4 Industry → Step 5 View Results →

Change **Change** **Change** **Change** **Start over**

Minnesota 2014 Total of All Ownerships
Total of All Government
Federal Government...

Total, All Industries (000000)

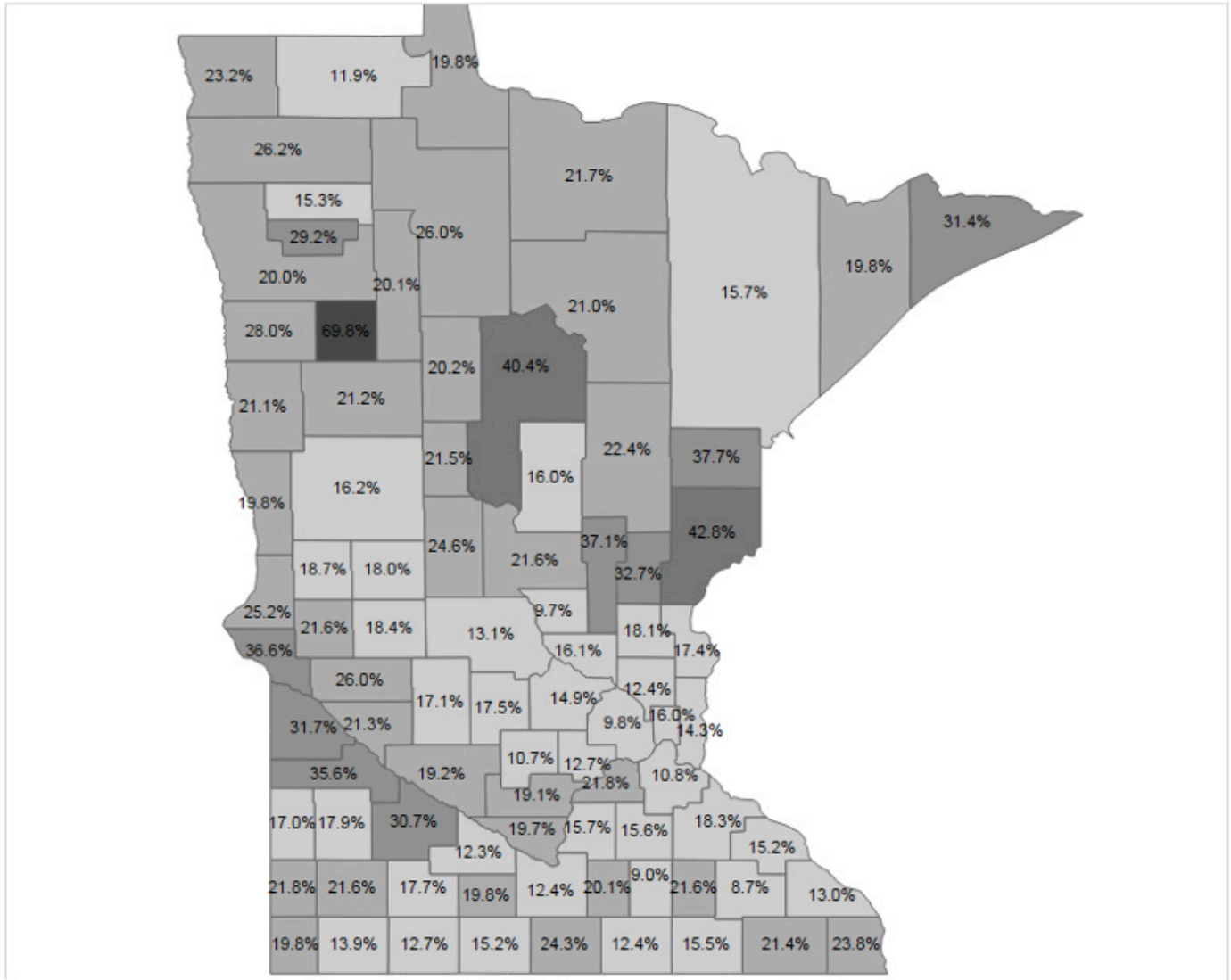
QCEW RESULTS

Employment Establishments Wages Average Weekly Wages Gross Employment Gains* Gross Employment Loss* More BED*>

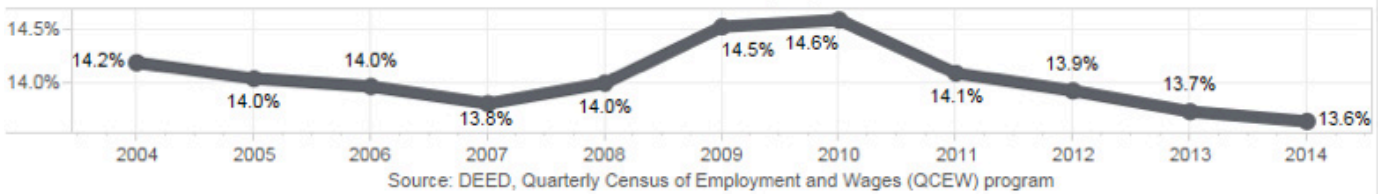
Geography	Industry	Ownership	Year	Q1	Q2	Q3	Q4	Annual
Minnesota	Total, All Industries (000000)	Total, All Ownerships	2014	2,657,257	2,746,510	2,747,728	2,766,556	2,729,513
Minnesota	Total, All Industries (000000)	Total Government	2014	378,166	381,630	342,754	385,652	372,051
Minnesota	Total, All Industries (000000)	Federal Government	2014	30,951	31,190	31,299	31,163	31,151
Minnesota	Total, All Industries (000000)	State Government	2014	76,793	77,104	76,422	77,763	77,021
Minnesota	Total, All Industries (000000)	Local Government	2014	270,422	273,335	235,033	276,724	263,879

* Business Employment Dynamics

Government's Share of Covered Employment by County, 2014



Government's Share of Covered Employment in Minnesota



by Luke Greiner
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Labor Force Estimates

County/ Area

County/ Area	Labor Force			Employment			Unemployment			Rate of Unemployment		
	Nov 2015	Oct 2015	Nov 2014	Nov 2015	Oct 2015	Nov 2014	Nov 2015	Oct 2015	Nov 2014	Nov 2015	Oct 2015	Nov 2014
United States ('000s)												
(Seasonally adjusted)	157,301	157,028	156,402	149,364	149,120	147,331	7,937	7,908	9,071	5.0%	5.0%	5.8%
(Unadjusted)	157,340	157,313	156,297	149,766	149,716	147,666	7,573	7,597	8,630	4.8	4.8	5.5
Minnesota												
(Seasonally adjusted)	3,006,692	2,997,982	2,976,013	2,900,370	2,886,829	2,866,740	106,592	111,153	109,273	3.5	3.7	3.7
(Unadjusted)	3,009,360	3,002,279	2,976,598	2,920,028	2,912,203	2,881,316	89,332	90,076	95,282	3.0	3.0	3.2
Metropolitan Statistical Areas (MSA)*												
Mpls.-St. Paul MSA	1,929,435	1,919,142	1,916,531	1,876,484	1,863,227	1,857,985	52,951	55,915	58,546	2.7	2.9	3.1
Duluth-Superior MSA	143,483	142,823	142,043	136,637	136,682	136,124	6,846	6,141	5,919	4.8	4.3	4.2
Rochester MSA	116,879	116,775	116,756	114,111	113,874	113,592	2,768	2,901	3,164	2.4	2.5	2.7
St. Cloud MSA	109,223	109,318	109,823	106,003	106,166	106,145	3,220	3,152	3,678	2.9	2.9	3.3
Mankato-N Mankato MSA	59,248	59,631	59,805	58,013	58,181	58,456	1,235	1,450	1,349	2.1	2.4	2.3
Fargo-Moorhead MSA	129,885	129,100	130,464	127,354	126,798	127,628	2,531	2,302	2,836	1.9	1.8	2.2
Grand Forks MSA	55,595	55,400	55,476	54,363	54,317	53,992	1,232	1,083	1,484	2.2	2.0	2.7
Region One	51,405	51,420	49,408	49,611	49,940	47,819	1,794	1,480	1,589	3.5	2.9	3.2
Kittson	2,535	2,573	2,396	2,442	2,495	2,313	93	78	83	3.7	3.0	3.5
Marshall	6,180	6,205	5,757	5,849	5,978	5,462	331	227	295	5.4	3.7	5.1
Norman	3,618	3,686	3,376	3,507	3,580	3,252	111	106	124	3.1	2.9	3.7
Pennington	9,507	9,473	9,149	9,201	9,208	8,890	306	265	259	3.2	2.8	2.8
Polk	18,107	18,100	17,613	17,571	17,610	17,075	536	490	538	3.0	2.7	3.1
Red Lake	2,464	2,428	2,331	2,339	2,344	2,250	125	84	81	5.1	3.5	3.5
Roseau	8,994	8,955	8,786	8,702	8,725	8,577	292	230	209	3.2	2.6	2.4
Region Two	43,326	43,229	42,377	41,225	41,432	40,239	2,101	1,797	2,138	4.8	4.2	5.0
Beltrami	24,420	24,204	23,820	23,453	23,316	22,809	967	888	1,011	4.0	3.7	4.2
Clearwater	4,716	4,675	4,619	4,351	4,385	4,230	365	290	389	7.7	6.2	8.4
Hubbard	9,484	9,560	9,323	8,932	9,130	8,794	552	430	529	5.8	4.5	5.7
Lake of the Woods	2,351	2,418	2,295	2,240	2,331	2,184	111	87	111	4.7	3.6	4.8
Mahnomen	2,355	2,372	2,320	2,249	2,270	2,222	106	102	98	4.5	4.3	4.2
Region Three	163,934	163,212	161,779	155,284	155,702	154,600	8,650	7,510	7,179	5.3	4.6	4.4
Aitkin	6,796	6,760	6,763	6,414	6,480	6,397	382	280	366	5.6	4.1	5.4
Carlton	17,531	17,439	17,371	16,753	16,751	16,656	778	688	715	4.4	3.9	4.1
Cook	2,953	3,117	2,943	2,834	3,029	2,796	119	88	147	4.0	2.8	5.0
Itasca	22,518	22,218	21,983	20,906	20,980	20,739	1,612	1,238	1,244	7.2	5.6	5.7
Koochiching	6,205	6,186	6,179	5,658	5,737	5,704	547	449	475	8.8	7.3	7.7
Lake	5,549	5,649	5,495	5,315	5,437	5,286	234	212	209	4.2	3.8	3.8
St. Louis	102,382	101,843	101,045	97,404	97,288	97,022	4,978	4,555	4,023	4.9	4.5	4.0
City of Duluth	45,321	45,290	45,316	44,014	43,961	43,841	1,307	1,329	1,475	2.9	2.9	3.3
Balance of St. Louis County	57,061	56,553	55,729	53,390	53,327	53,181	3,671	3,226	2,548	6.4	5.7	4.6
Region Four	129,498	129,518	125,453	125,824	126,247	121,697	3,674	3,271	3,756	2.8	2.5	3.0
Becker	18,327	18,128	17,886	17,621	17,561	17,204	706	567	682	3.9	3.1	3.8
Clay	36,645	36,386	36,203	35,845	35,574	35,433	800	812	770	2.2	2.2	2.1
Douglas	20,224	20,259	19,962	19,680	19,777	19,335	544	482	627	2.7	2.4	3.1
Grant	3,562	3,588	3,337	3,432	3,488	3,223	130	100	114	3.6	2.8	3.4
Otter Tail	31,853	31,979	30,844	30,784	31,079	29,750	1,069	900	1,094	3.4	2.8	3.5
Pope	6,644	6,737	6,196	6,482	6,577	6,009	162	160	187	2.4	2.4	3.0
Stevens	6,427	6,504	5,651	6,310	6,385	5,524	117	119	127	1.8	1.8	2.2
Traverse	1,879	1,916	1,702	1,827	1,870	1,634	52	46	68	2.8	2.4	4.0
Wilkin	3,937	4,021	3,672	3,843	3,936	3,585	94	85	87	2.4	2.1	2.4
Region Five	82,227	82,540	81,282	78,252	79,381	77,016	3,975	3,159	4,266	4.8	3.8	5.2
Cass	14,019	14,222	13,863	13,181	13,584	12,983	838	638	880	6.0	4.5	6.3
Crow Wing	30,499	30,628	30,669	29,017	29,435	29,041	1,482	1,193	1,628	4.9	3.9	5.3
Morrison	17,631	17,681	17,437	16,807	17,027	16,500	824	654	937	4.7	3.7	5.4
Todd	13,793	13,782	13,087	13,279	13,369	12,586	514	413	501	3.7	3.0	3.8
Wadena	6,285	6,227	6,226	5,968	5,966	5,906	317	261	320	5.0	4.2	5.1
Region Six East	68,556	69,632	65,232	66,541	67,700	63,014	2,015	1,932	2,218	2.9	2.8	3.4
Kandiyohi	25,111	25,261	24,004	24,434	24,607	23,243	677	654	761	2.7	2.6	3.2
McLeod	20,070	20,478	19,680	19,470	19,871	19,025	600	607	655	3.0	3.0	3.3
Meeker	13,673	13,753	13,159	13,249	13,367	12,678	424	386	481	3.1	2.8	3.7
Renville	9,702	10,140	8,389	9,388	9,855	8,068	314	285	321	3.2	2.8	3.8

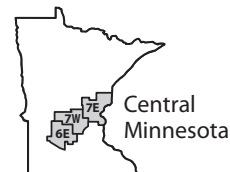
*Minneapolis-St. Paul Metropolitan Statistical Area (MSA) now includes Sherburne County in Minnesota and Pierce County in Wisconsin. St. Cloud MSA is now comprised of Benton and Stearns counties.

Numbers are unadjusted unless otherwise labeled.
Source: Department of Employment and Economic Development,
Local Area Unemployment Statistics, and North Dakota Job Service, 2015.

Labor Force Estimates

County/ Area

County/ Area	Labor Force			Employment			Unemployment			Rate of Unemployment		
	Nov 2015	Oct 2015	Nov 2014	Nov 2015	Oct 2015	Nov 2014	Nov 2015	Oct 2015	Nov 2014	Nov 2015	Oct 2015	Nov 2014
Region Six West	24,766	25,258	23,746	23,978	24,336	22,951	788	922	795	3.2%	3.7%	3.3%
Big Stone	2,720	2,791	2,604	2,627	2,707	2,515	93	84	89	3.4	3.0	3.4
Chippewa	7,268	7,332	7,017	7,046	7,100	6,796	222	232	221	3.1	3.2	3.1
Lac Qui Parle	3,847	3,921	3,689	3,744	3,809	3,556	103	112	133	2.7	2.9	3.6
Swift	5,229	5,447	4,934	5,005	5,088	4,756	224	359	178	4.3	6.6	3.6
Yellow Medicine	5,702	5,767	5,502	5,556	5,632	5,328	146	135	174	2.6	2.3	3.2
Region Seven East	85,722	85,168	85,371	82,423	82,182	81,504	3,299	2,986	3,867	3.8	3.5	4.5
Chisago	28,933	28,708	28,698	27,988	27,819	27,658	945	889	1,040	3.3	3.1	3.6
Isanti	20,378	20,257	20,310	19,730	19,609	19,498	648	648	812	3.2	3.2	4.0
Kanabec	8,810	8,769	8,844	8,352	8,389	8,268	458	380	576	5.2	4.3	6.5
Mille Lacs	12,830	12,678	12,761	12,231	12,173	12,059	599	505	702	4.7	4.0	5.5
Pine	14,771	14,756	14,758	14,122	14,192	14,021	649	564	737	4.4	3.8	5.0
Region Seven West	230,371	229,676	230,136	223,590	223,017	222,357	6,781	6,659	7,779	2.9	2.9	3.4
Benton	21,551	21,468	21,727	20,769	20,778	20,837	782	690	890	3.6	3.2	4.1
Sherburne	49,491	49,113	49,134	47,934	47,612	47,402	1,557	1,501	1,732	3.1	3.1	3.5
Stearns	87,672	87,850	88,096	85,234	85,388	85,308	2,438	2,462	2,788	2.8	2.8	3.2
Wright	71,657	71,245	71,179	69,653	69,239	68,810	2,004	2,006	2,369	2.8	2.8	3.3
Region Eight	68,907	69,560	65,883	67,128	67,684	64,079	1,779	1,876	1,804	2.6	2.7	2.7
Cottonwood	6,098	6,047	5,713	5,861	5,700	5,522	237	347	191	3.9	5.7	3.3
Jackson	6,691	6,817	6,328	6,512	6,621	6,134	179	196	194	2.7	2.9	3.1
Lincoln	3,560	3,647	3,341	3,472	3,575	3,242	88	72	99	2.5	2.0	3.0
Lyon	15,820	15,968	15,546	15,452	15,609	15,130	368	359	416	2.3	2.2	2.7
Murray	5,193	5,284	4,928	5,033	5,140	4,752	160	144	176	3.1	2.7	3.6
Nobles	11,839	11,924	11,335	11,550	11,613	11,068	289	311	267	2.4	2.6	2.4
Pipestone	5,401	5,427	4,932	5,288	5,309	4,818	113	118	114	2.1	2.2	2.3
Redwood	8,279	8,362	8,037	8,033	8,135	7,793	246	227	244	3.0	2.7	3.0
Rock	6,026	6,084	5,723	5,927	5,982	5,620	99	102	103	1.6	1.7	1.8
Region Nine	132,802	133,869	131,680	129,173	130,090	127,727	3,629	3,779	3,953	2.7	2.8	3.0
Blue Earth	39,127	39,376	39,576	38,288	38,378	38,625	839	998	951	2.1	2.5	2.4
Brown	14,756	14,834	14,008	14,292	14,402	13,564	464	432	444	3.1	2.9	3.2
Faribault	7,576	7,769	7,503	7,314	7,516	7,218	262	253	285	3.5	3.3	3.8
Le Sueur	15,839	15,780	15,648	15,307	15,284	15,014	532	496	634	3.4	3.1	4.1
Martin	10,397	10,488	10,328	10,108	10,181	9,960	289	307	368	2.8	2.9	3.6
Nicollet	20,121	20,255	20,229	19,725	19,803	19,831	396	452	398	2.0	2.2	2.0
Sibley	8,854	8,967	8,505	8,587	8,698	8,234	267	269	271	3.0	3.0	3.2
Waseca	9,607	9,803	9,617	9,277	9,481	9,255	330	322	362	3.4	3.3	3.8
Watsonwan	6,525	6,597	6,266	6,275	6,347	6,026	250	250	240	3.8	3.8	3.8
Region Ten	280,129	280,391	277,201	273,134	273,075	269,433	6,995	7,316	7,768	2.5	2.6	2.8
Dodge	11,397	11,459	11,263	11,088	11,120	10,946	309	339	317	2.7	3.0	2.8
Fillmore	11,412	11,530	11,187	11,082	11,201	10,796	330	329	391	2.9	2.9	3.5
Freeborn	16,655	16,727	16,338	16,108	16,225	15,752	547	502	586	3.3	3.0	3.6
Goodhue	27,269	27,377	26,930	26,546	26,644	26,194	723	733	776	2.7	2.7	2.9
Houston	10,670	10,651	10,527	10,357	10,348	10,199	313	303	328	2.9	2.8	3.1
Mower	20,707	20,677	20,449	20,221	20,155	19,879	486	522	570	2.3	2.5	2.8
Olmsted	81,963	81,591	82,457	80,162	79,675	80,331	1,801	1,916	2,126	2.2	2.3	2.6
City of Rochester	60,305	60,005	60,653	58,918	58,560	59,042	1,387	1,445	1,611	2.3	2.4	2.7
Rice	35,779	35,741	35,022	34,857	34,743	34,010	922	998	1,012	2.6	2.8	2.9
Steele	21,822	22,076	21,494	21,296	21,527	20,911	526	549	583	2.4	2.5	2.7
Wabasha	12,107	12,195	11,849	11,779	11,878	11,519	328	317	330	2.7	2.6	2.8
Winona	30,348	30,367	29,645	29,638	29,559	28,896	710	808	749	2.3	2.7	2.5
Region Eleven	1,647,726	1,638,805	1,637,046	1,603,868	1,591,415	1,588,880	43,858	47,390	48,166	2.7	2.9	2.9
Anoka	190,623	189,556	189,487	185,231	183,817	183,448	5,392	5,739	6,039	2.8	3.0	3.2
Carver	54,440	54,266	53,900	53,115	52,828	52,427	1,325	1,438	1,473	2.4	2.6	2.7
Dakota	233,139	231,768	231,457	227,024	225,273	224,865	6,115	6,495	6,592	2.6	2.8	2.8
Hennepin	675,800	672,018	671,854	657,870	652,534	652,123	17,930	19,484	19,731	2.7	2.9	2.9
City of Bloomington	46,886	46,632	46,660	45,674	45,304	45,275	1,212	1,328	1,385	2.6	2.8	3.0
City of Minneapolis	229,372	228,246	228,142	223,273	221,462	221,323	6,099	6,784	6,819	2.7	3.0	3.0
Ramsey	278,617	277,237	276,810	270,790	268,664	268,299	7,827	8,573	8,511	2.8	3.1	3.1
City of St. Paul	153,053	152,424	152,039	148,558	147,391	147,191	4,495	5,033	4,848	2.9	3.3	3.2
Scott	78,121	77,674	77,546	76,220	75,646	75,475	1,901	2,028	2,071	2.4	2.6	2.7
Washington	136,986	136,286	135,992	133,618	132,653	132,243	3,368	3,633	3,749	2.5	2.7	2.8



Industrial Analysis

Overview

Minnesota added 7,200 jobs (0.3 percent) on a seasonally adjusted basis in November. October estimates were also revised up and now reflect a 200 job gain over September. The November increase was driven by growth of 3,300 jobs (3.2 percent) in Construction, as well as an increase of 1,000 jobs (0.2 percent) in Government employment. Goods producers added 2,800 jobs (0.7 percent) while service providers added 4,400 (0.2 percent), including the 1,000 new government jobs. Annually, Minnesota added 32,130 jobs (1.1 percent). Private sector service providers represented the entirety of that increase, growing by 36,309 (1.8 percent) while goods producers shed 781 jobs (0.2 percent), and the Government lost 3,398 jobs (0.8 percent) on the year. The largest proportional change came in Mining and Logging, which lost 894 jobs or 12.2 percent from 2014 estimates. The most dramatic increase, both proportionally and numerically, came in Professional and Business Services, which added 12,839 jobs (3.6 percent).

Mining and Logging

Employment in Mining and Logging was flat in November, following two straight months of job losses in the industry. The situation remained dire annually, however, as Mining and Logging had a larger proportional drop than any supersector in the state, shedding 894 jobs (12.2 percent). The situation in Mining and Logging figures to remain volatile for the time being as it continues to struggle with an unfavorable worldwide market for iron, a key segment of Minnesota's mining industry.

Construction

Employment in Construction was up sharply in November as the supersector added 3,300 jobs (3.2 percent). The increase came on the heels

of consecutive losses of 1,500 and 2,400 jobs in September and October, helping to push employment back towards its more traditional levels. Annually, Construction employment was up by 1,506 (1.4 percent). Specialty Trade Contractors added 2,017 jobs (2.9 percent) which, in combination with smaller numerical gains in the other component sectors, more than made up for the loss of 1,803 jobs (11 percent) in Heavy and Civil Engineering Construction.

Manufacturing

Manufacturing employment slumped slightly in November, losing 500 jobs (0.2 percent) on the month. The losses came entirely from Non-Durable Goods Manufacturers, who lost 900 jobs (0.8 percent) while Durable Goods Manufacturers added 400 jobs (0.2 percent). That same trend is reflected in the over-the-year estimates, which show Manufacturing off 1,393 jobs (0.4 percent), with growth of 667 jobs (0.3 percent) in Durable Goods unable to make up for the larger loss of 2,060 jobs (1.8 percent) in Non-Durable Goods. The component Food Manufacturing sector was responsible for most of that decline, down 2,066 jobs (4.4 percent), but Paper Manufacturing, and Printing and Related Support Activities also lost significant employment, down 1,031 (3.1 percent).

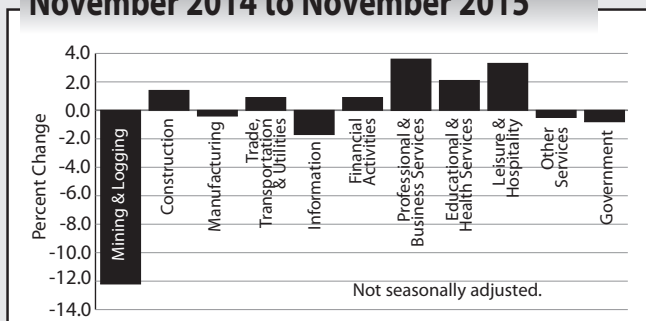
Trade, Transportation, and Utilities

Trade, Transportation, and Utilities employment was up slightly in November, adding 800 jobs (0.2 percent). The increase came entirely from growth in Transportation, Warehousing, and Utilities, which added 1,600 jobs (1.6 percent) while component sector Retail Trade lost 800 (0.3 percent). Employment in Wholesale Trade was flat in November. Over the year the supersector added 4,703 jobs (0.9 percent). Retail Trade added 4,088 jobs (1.4 percent), and Transportation, Warehousing, and Utilities added 3,265 jobs (3.4 percent), while Wholesale Trade lost 2,650 (2 percent).

Information

Employment in the Information supersector ticked up slightly in November, adding 100 jobs (0.2 percent) after two straight months of losing 400 jobs each. Annually, Information lost 909 jobs (1.7 percent) with declines in both published component sectors, Publishing Industries (except Internet) and Telecommunications.

MN Employment Growth November 2014 to November 2015



Source: Department of Employment and Economic Development, Current Employment Statistics, 2015.

*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

The Financial Activities supersector showed a slight increase in employment for November, adding 400 jobs (0.2 percent). Finance and Insurance added 800 jobs (0.6 percent) while Real Estate and Rental and Leasing lost 400 (1 percent). Annually, Financial Activities added 1,652 jobs (0.9 percent). Most of that growth came from Finance and Insurance, which added 1,511 jobs (1.1 percent) on the back of an additional 1,787 jobs in Insurance Carriers and Related Activities.

Professional and Business Services

Professional and Business Services added 900 jobs (0.2 percent) in November, the supersector's fifth straight month of seasonally adjusted growth. Most of that growth came in Professional, Scientific, and Technical Services, which added 2,500 jobs (1.7 percent) while Administrative and Support and Waste Management and Remediation Services lost 1,800 (1.2 percent). Over the year, Professional and Business Services showed more growth than any other supersector, adding 12,839 jobs (3.6 percent). Professional, Scientific, and Technical Services added 5,131 jobs (3.6 percent), and Administrative and Support and Waste Management and Remediation Services added 8,563 (6.2 percent), while Management of Companies and Enterprises lost 855 jobs (1.1 percent).

Educational and Health Services

Educational and Health Services employment was up slightly in November, adding 600 jobs (0.1 percent), with all 600 of those jobs coming in Educational Services (up 0.9 percent) as Health Care and Social Assistance employment was flat. Annually, the supersector boasted a healthy 10,474 job (2.1 percent) increase. The entirety of the annual gain came in Health Care and Social Assistance, as Educational Services lost 634 jobs (0.9 percent). Health Care gains were spread among sectors, with Hospitals adding 2,217 jobs (2.1 percent), Offices of Physicians adding 1,649 (2.5 percent), and the Social Assistance sector accounting for an additional 4,932 jobs (5.9 percent).

Leisure and Hospitality

Leisure and Hospitality added 900 jobs (0.3 percent) in November. Accommodation and Food Services added 1,500 jobs (0.7 percent) while Arts, Entertainment, and Recreation employment dipped by 600 (1.4 percent). Over the year, employment in the supersector was up by 8,106 jobs (3.3 percent). Arts, Entertainment, and Recreation added 2,705 jobs (7.7 percent), and Accommodation and Food Services added 5,401 (2.6 percent).

Other Services

Over the month, employment in Other Services decreased by 0.3 percent for a change of 300 on a seasonally adjusted basis. Employment in Other Services decreased by 0.5 percent to 112,995 or 556 over the year. Most of that loss came in the Religious, Grantmaking, Civic, Professional, and Similar Organizations sector which shed 1,462 jobs, 2.3 percent.

Government

Employment in Government decreased 0.8 percent to 426,408 or 3,398 over the year. Over the month, employment increased 0.2 percent for a change of 1,000 on a seasonally adjusted basis. State Government decreased 2.3 percent or 2,482 over the year. Federal Government increased 1.2 percent or 365 over the year. Local Government decreased 0.4 percent or 1,281 over the year.

by Nick Dobbins

Seasonally Adjusted Nonfarm Employment

In 1,000's

Industry	November 2015	October 2015	September 2015
Total Nonagricultural	2,862.6	2,855.4	2,855.2
Goods-Producing	428.1	425.3	427.1
Mining and Logging	6.4	6.4	6.7
Construction	107.6	104.3	106.7
Manufacturing	314.1	314.6	313.7
Service-Providing	2,434.5	2,430.1	2,428.1
Trade, Transportation, and Utilities	522.9	522.1	522.7
Information	52.2	52.1	52.5
Financial Activities	181.5	181.1	181.7
Professional and Business Services	370.3	369.4	365.8
Educational and Health Services	512.9	512.3	512.8
Leisure and Hospitality	264.3	263.4	264.8
Other Services	113.1	113.4	111.8
Government	417.3	416.3	416.0

Source: Department of Employment and Economic Development
Current Employment Statistics, 2015.

Regional Analysis

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

Employment in the Minneapolis-St. Paul MSA was down slightly in November, losing 2,361 jobs (0.1 percent). As is often the case this time of year, the Mining, Logging, and Construction and Leisure and Hospitality supersectors led the decline, shedding 2,343 jobs (3 percent) and 4,910 jobs (2.7 percent) respectively as their peak seasons came to a close. Professional and Business Services also lost jobs in November, shedding 1,726 (0.5 percent), with the Administrative and Support and Waste Management and Remediation Services sector losing 3,458 jobs (2.9 percent). Although employment in the metro declined overall, more supersectors added jobs than lost them. Trade, Transportation, and Utilities added 3,840 jobs (1.1 percent), with 3,466 new jobs coming in Retail Trade. Government employers added 1,499 (0.6 percent). Annually, the metro area added 30,609 jobs (1.6 percent). The biggest losses came in Government employment, which lost 2,476 jobs (1 percent) over the year, primarily in Local Government. There were large annual job gains in Professional and Business Services (up 12, 077 jobs, 3.9 percent), Leisure and Hospitality (up 9,013 jobs, 5.3 percent), and Educational and Health Services (up 8,450, 2.7 percent).

Duluth-Superior MSA

Employment in the Duluth-Superior MSA dipped in November as the area lost 1,022 jobs (0.7 percent), with employment in most supersectors declining on the month. Mining, Logging, and Construction lost 475 jobs (4.7 percent), and Leisure and Hospitality lost 726 (5.3 percent), which conforms to expected seasonal employment patterns. Areas with notable job gains

included Government (up 211 or 0.8 percent) and Financial Activities (up 140 or 2.6 percent). Over the year the Duluth metro added 1,298 jobs (1 percent). Trade, Transportation, and Utilities lost 283 jobs (1.1 percent), largely from a sharp drop of 546 jobs (3.4 percent) in Retail Trade. The only other supersectors to shed jobs on the year were Information (down 31 jobs or 2.2 percent) and Other Services (down 7 jobs, 0.1 percent).

Rochester MSA

The Rochester MSA lost 131 jobs (0.1 percent) in November. In addition to the usual winter suspects, Leisure and Hospitality and Mining, Logging, and Construction, losses also appeared in Manufacturing (down 252 jobs, 2.3 percent) and Professional and Business Services (down 66, 1.1 percent), among others. The largest monthly increase was in Trade, Transportation, and Utilities, which added 323 jobs (1.8 percent) on the back of an additional 297 jobs (2.4 percent) appearing in Retail Trade as the holiday shopping season presumably started in earnest. Annually, Rochester added 109 jobs (0.1 percent), mirroring the monthly change with big gains in Trade, Transportation, and Utilities (up 247 or 1.4 percent) and significant losses in Leisure and Hospitality (down 243 or 2.4 percent).

St. Cloud MSA

Employment in the Saint Cloud MSA was down by 542 (0.5 percent) in November. Besides Leisure and Hospitality and Mining, Logging, and Construction, significant losses also appeared in the Financial Activities supersector, which shed 127 jobs (2.6

percent). The only supersectors to add jobs were Government (up 285 or 1.8 percent) and Trade, Transportation, and Utilities (up 130 or 0.6 percent). Annually, Saint Cloud lost 471 jobs, (0.4 percent). Most supersectors lost employment, and the only gains appeared in Government (up 397 or 2.5 percent) and Manufacturing (up 66 or 0.4 percent).

Mankato-North Mankato MSA

Employment in the Mankato-North Mankato MSA dipped by 359 (0.6 percent) in November. All of the decrease was in the private sector, as Government employment ticked up slightly, adding 32 jobs (0.3 percent). Annually, Mankato employment is down 785 (1.4 percent) with private and public employers both shedding jobs.

Fargo-Moorhead MSA

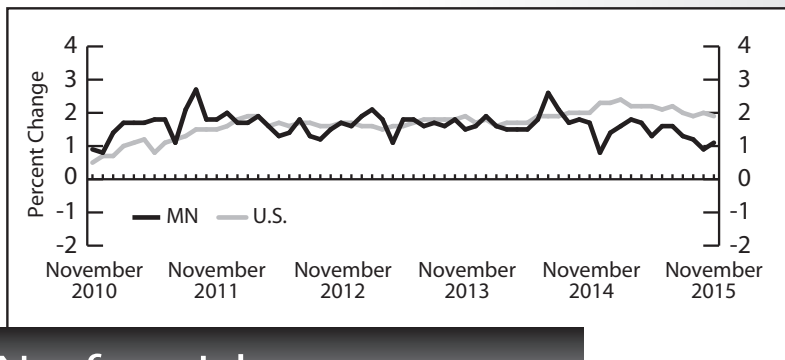
The Fargo-Moorhead MSA added 582 jobs (0.4 percent) in November, primarily on the strength of a 574-job (1.9 percent) increase in Trade, Transportation, and Utilities. The MSA also bucked a strong seasonal trend by adding 260 jobs (1.7 percent) in Leisure and Hospitality in November for reasons that defy simple analysis. The Grand Forks-East Grand Forks MSA also added employment in this supersector for November, making them the only two MSAs we look at to do so. Annually, the Fargo metro area added 1,113 jobs (0.8 percent) with increases across a number of supersectors. Significant losses came in Trade, Transportation, and Utilities (down 482 or 1.5 percent) and Manufacturing (down 222 or 2.1 percent), among others.

Grand Forks-East Grand Forks MSA

Employment in the Grand Forks-East Grand Forks MSA grew by 205 (0.3 percent) in November. As would be expected, Trade, Transportation, and Utilities (up 231 or 1.7 percent) and Government (up 106 or 0.7 percent) were among the notable expansions for the month, and Mining, Logging, and Construction (down 131 or 3.5 percent) was the largest job loser. Annually, the Grand Forks area added 717 jobs (1.2 percent). Trade, Transportation, and Utilities had the largest numerical growth, adding 460 jobs (3.4 percent) on the strength of 437 new jobs in Retail Trade. The biggest proportional growth came in Mining, Logging, and Construction, which added 296 jobs or 8.9 percent.

by Nick Dobbins

Source: Department of Employment and Economic Development, Current Employment Statistics, 2015; Bureau of Labor Statistics, U.S. Department of Labor, Current Employment Statistics, 2015.



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					
	Nov 2015	Oct 2015	Nov 2014	Oct 2015	Nov 2014	Average Weekly Earnings		Average Weekly Hours		Average Hourly Earnings	
						Nov 2015	Nov 2014	Nov 2015	Nov 2014	Nov 2015	Nov 2014
TOTAL NONFARM WAGE AND SALARY	2,880.6	2,888.3	2,848.5	-0.3%	1.1%	—	—	—	—	—	—
GOODS-PRODUCING	432.3	439.9	433.1	-1.7	-0.2	—	—	—	—	—	—
Mining and Logging	6.5	6.7	7.3	-3.1	-12.2	—	—	—	—	—	—
Construction	111.4	117.0	109.9	-4.7	1.4	—	—	—	—	—	—
Specialty Trade Contractors	70.9	72.7	68.9	-2.3	2.9	\$1,165.01	\$1,093.51	38.5	35.9	\$30.26	\$30.46
Manufacturing	314.4	316.2	315.8	-0.6	-0.4	823.77	821.49	40.6	41.7	20.29	19.70
Durable Goods	202.7	203.0	202.1	-0.1	0.3	827.04	815.48	39.8	42.1	20.78	19.37
Wood Product Manufacturing	10.9	10.9	10.9	-0.1	-0.6	—	—	—	—	—	—
Fabricated Metal Production	44.1	43.7	43.3	0.8	1.8	—	—	—	—	—	—
Machinery Manufacturing	32.9	32.8	32.6	0.1	1.0	—	—	—	—	—	—
Computer and Electronic Product	46.1	46.0	45.2	0.1	1.9	—	—	—	—	—	—
Navigational, Measuring, Electromedical and Control	25.5	25.4	25.4	0.2	0.4	—	—	—	—	—	—
Transportation Equipment	11.6	11.6	11.8	0.2	-1.7	—	—	—	—	—	—
Medical Equipment and Supplies Manufacturing	16.0	16.0	15.5	0.2	3.1	—	—	—	—	—	—
Nondurable Goods	111.7	113.2	113.7	-1.3	-1.8	819.84	829.84	42.0	41.0	19.52	20.24
Food Manufacturing	45.0	45.4	47.1	-0.8	-4.4	—	—	—	—	—	—
Paper Manufacturing	31.8	31.9	32.8	-0.5	-3.1	—	—	—	—	—	—
Printing and Related	23.2	23.3	23.8	-0.5	-2.3	—	—	—	—	—	—
SERVICE-PROVIDING	2,448.3	2,448.4	2,415.4	0.0	1.4	—	—	—	—	—	—
Trade, Transportation, and Utilities	531.3	524.6	526.6	1.3	0.9	—	—	—	—	—	—
Wholesale Trade	129.5	129.8	132.2	-0.2	-2.0	901.71	1,002.96	38.8	39.8	23.24	25.20
Retail Trade	301.2	296.1	297.1	1.7	1.4	426.03	408.98	29.2	28.5	14.59	14.35
Motor Vehicle and Parts	34.7	34.7	33.4	0.2	4.0	—	—	—	—	—	—
Building Material and Garden Equipment	25.5	26.0	25.3	-2.0	0.9	—	—	—	—	—	—
Food and Beverage Stores	51.6	51.2	51.8	0.8	-0.4	—	—	—	—	—	—
Gasoline Stations	24.5	24.4	24.1	0.4	1.8	—	—	—	—	—	—
General Merchandise Stores	66.7	62.7	64.9	6.4	2.7	341.93	305.28	29.2	28.8	11.71	10.60
Transportation, Warehouse, Utilities	100.6	98.7	97.3	2.0	3.4	—	—	—	—	—	—
Transportation and Warehousing	87.2	85.3	84.2	2.2	3.6	734.76	664.65	36.0	35.0	20.41	18.99
Information	52.0	52.0	52.9	0.1	-1.7	1,009.88	856.89	37.5	35.6	26.93	24.07
Publishing Industries	19.8	19.8	20.4	-0.2	-3.0	—	—	—	—	—	—
Telecommunications	13.3	13.4	13.4	-0.4	-0.7	—	—	—	—	—	—
Financial Activities	181.0	181.1	179.4	0.0	0.9	—	—	—	—	—	—
Finance and Insurance	141.4	141.0	139.8	0.2	1.1	905.04	885.45	36.0	36.2	25.14	24.46
Credit Intermediation	54.8	54.4	54.6	0.7	0.3	734.36	712.13	34.3	35.5	21.41	20.06
Securities, Commodity Contracts, and Other	18.6	18.6	18.7	-0.2	-0.6	—	—	—	—	—	—
Insurance Carriers and Related	67.2	67.1	65.4	0.2	2.7	—	—	—	—	—	—
Real Estate and Rental and Leasing	39.7	40.1	39.5	-0.9	0.4	—	—	—	—	—	—
Professional and Business Services	371.2	373.4	358.4	-0.6	3.6	—	—	—	—	—	—
Professional, Scientific, and Technical Services	147.1	145.9	142.0	0.9	3.6	—	—	—	—	—	—
Legal Services	18.0	18.0	18.1	-0.2	-0.5	—	—	—	—	—	—
Accounting, Tax Preparation	16.8	16.4	16.0	2.1	5.1	—	—	—	—	—	—
Computer Systems Design	39.5	39.3	34.6	0.6	14.3	—	—	—	—	—	—
Management of Companies and Enterprises	76.9	76.4	77.7	0.6	-1.1	—	—	—	—	—	—
Administrative and Support Services	147.3	151.1	138.7	-2.6	6.2	—	—	—	—	—	—
Educational and Health Services	518.6	517.7	508.1	0.2	2.1	—	—	—	—	—	—
Educational Services	71.9	70.5	72.5	1.9	-0.9	—	—	—	—	—	—
Health Care and Social Assistance	446.7	447.2	435.6	-0.1	2.5	—	—	—	—	—	—
Ambulatory Health Care	142.9	143.1	139.7	-0.2	2.3	1,301.83	1,253.16	36.9	35.4	35.28	35.40
Offices of Physicians	68.6	68.4	66.9	0.3	2.5	—	—	—	—	—	—
Hospitals	107.6	107.2	105.4	0.4	2.1	—	—	—	—	—	—
Nursing and Residential Care Facilities	107.2	106.6	106.4	0.5	0.8	442.09	433.64	29.2	29.3	15.14	14.80
Social Assistance	89.1	90.2	84.2	-1.3	5.9	—	—	—	—	—	—
Leisure and Hospitality	254.8	263.5	246.6	-3.3	3.3	—	—	—	—	—	—
Arts, Entertainment, and Recreation	38.0	43.0	35.3	-11.7	7.7	—	—	—	—	—	—
Accommodation and Food Services	216.7	220.4	211.3	-1.7	2.6	—	—	—	—	—	—
Food Services and Drinking Places	193.3	194.9	185.6	-0.9	4.1	268.98	256.52	20.9	21.2	12.87	12.10
Other Services	113.0	113.5	113.6	-0.4	-0.5	—	—	—	—	—	—
Religious, Grantmaking, Civic, Professional Organizations	62.1	62.5	63.6	-0.7	-2.3	—	—	—	—	—	—
Government	426.4	422.8	429.8	0.9	-0.8	—	—	—	—	—	—
Federal Government	31.5	31.5	31.2	0.3	1.2	—	—	—	—	—	—
State Government	104.5	104.0	107.0	0.4	-2.3	—	—	—	—	—	—
State Government Education	66.0	65.4	68.3	0.9	-3.4	—	—	—	—	—	—
Local Government	290.4	287.3	291.7	1.1	-0.4	—	—	—	—	—	—
Local Government Education	143.4	141.2	143.6	1.6	-0.1	—	—	—	—	—	—

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, 2015.

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	
	Nov 2015	Oct 2015	Nov 2014	Oct 2015	Nov 2014	Nov 2015	Nov 2014	Nov 2015	Nov 2014	Nov 2015	Nov 2014
TOTAL NONFARM WAGE AND SALARY	1,953.1	1,955.4	1,922.5	-0.1%	1.6%	—	—	—	—	—	—
GOODS-PRODUCING	270.2	272.6	266.8	-0.9	1.3	—	—	—	—	—	—
Mining, Logging, and Construction	74.9	77.2	73.6	-3.0	1.8	—	—	—	—	—	—
Construction of Buildings	17.1	17.3	16.2	-0.9	5.5	—	—	—	—	—	—
Specialty Trade Contractors	50.8	51.6	48.8	-1.6	4.0	\$1,266.55	\$1,113.72	39.2	35.3	\$32.31	\$31.55
Manufacturing	195.4	195.4	193.2	0.0	1.1	877.76	854.06	41.6	41.1	21.10	20.78
Durable Goods	133.6	133.5	132.2	0.1	1.1	863.98	836.99	41.9	41.6	20.62	20.12
Fabricated Metal Production	29.9	29.8	29.4	0.5	1.7	—	—	—	—	—	—
Machinery Manufacturing	20.2	20.2	20.0	-0.1	0.9	—	—	—	—	—	—
Computer and Electronic Product	36.8	36.8	36.2	0.0	1.7	—	—	—	—	—	—
Navigational, Measuring, Electromedical and Control	23.7	23.7	23.7	0.2	0.2	—	—	—	—	—	—
Medical Equipment and Supplies Manufacturing	14.9	14.8	14.2	0.2	4.6	—	—	—	—	—	—
Nondurable Goods	61.8	61.9	61.0	-0.2	1.2	902.25	886.80	40.9	40.0	22.06	22.17
Food Manufacturing	14.8	14.9	15.1	-0.7	-1.8	—	—	—	—	—	—
Printing and Related	15.2	15.6	15.5	-2.0	-1.6	—	—	—	—	—	—
SERVICE-PROVIDING	1,682.8	1,682.8	1,655.7	0.0	1.6	—	—	—	—	—	—
Trade, Transportation, and Utilities	349.4	345.5	350.1	1.1	-0.2	—	—	—	—	—	—
Wholesale Trade	94.3	95.0	96.1	-0.7	-1.9	888.27	972.55	39.2	39.2	22.66	24.81
Merchant Wholesalers - Durable Goods	47.5	48.1	47.3	-1.2	0.4	—	—	—	—	—	—
Merchant Wholesalers - Nondurable Goods	27.6	27.5	27.7	0.4	-0.2	—	—	—	—	—	—
Retail Trade	185.9	182.5	186.6	1.9	-0.3	452.70	437.48	30.0	29.7	15.09	14.73
Food and Beverage Stores	30.8	30.5	31.0	1.0	-0.7	—	—	—	—	—	—
General Merchandise Stores	42.6	39.8	40.6	7.2	5.1	349.41	317.20	30.2	29.7	11.57	10.68
Transportation, Warehouse, Utilities	69.2	68.1	67.4	1.6	2.6	—	—	—	—	—	—
Utilities	8.1	8.0	7.9	0.1	2.0	—	—	—	—	—	—
Transportation and Warehousing	61.1	60.1	59.5	1.7	2.7	796.48	813.14	38.0	40.8	20.96	19.93
Information	39.2	39.2	39.6	0.0	-1.2	—	—	—	—	—	—
Publishing Industries	16.1	16.1	16.2	0.1	-0.6	—	—	—	—	—	—
Telecommunications	9.7	9.8	9.8	-0.6	-0.9	—	—	—	—	—	—
Financial Activities	148.0	147.8	146.3	0.1	1.1	—	—	—	—	—	—
Finance and Insurance	115.6	115.3	113.9	0.2	1.5	902.02	927.42	34.0	34.8	26.53	26.65
Credit Intermediation	39.8	39.5	39.8	0.6	-0.1	—	—	—	—	—	—
Securities, Commodity Contracts, and Other	16.8	16.7	16.7	0.4	0.5	—	—	—	—	—	—
Insurance Carriers and Related	57.1	56.9	55.9	0.3	2.0	—	—	—	—	—	—
Real Estate and Rental and Leasing	32.4	32.5	32.4	-0.4	0.0	—	—	—	—	—	—
Professional and Business Services	318.2	319.9	306.1	-0.5	3.9	—	—	—	—	—	—
Professional, Scientific, and Technical Services	132.1	130.9	123.7	1.0	6.9	—	—	—	—	—	—
Legal Services	15.3	15.3	15.3	0.1	-0.1	—	—	—	—	—	—
Architectural, Engineering, and Related	17.2	17.1	16.6	0.5	3.9	—	—	—	—	—	—
Computer Systems Design	34.0	33.8	31.7	0.6	7.3	—	—	—	—	—	—
Management of Companies and Enterprises	69.6	69.2	70.8	0.7	-1.7	—	—	—	—	—	—
Administrative and Support Services	116.4	119.9	111.6	-2.9	4.3	—	—	—	—	—	—
Employment Services	56.4	58.2	54.6	-3.2	3.1	—	—	—	—	—	—
Educational and Health Services	319.0	317.9	310.5	0.3	2.7	—	—	—	—	—	—
Educational Services	45.6	44.2	46.0	3.2	-0.8	—	—	—	—	—	—
Health Care and Social Assistance	273.3	273.6	264.5	-0.1	3.3	—	—	—	—	—	—
Ambulatory Health Care	86.0	86.5	84.1	-0.5	2.2	—	—	—	—	—	—
Hospitals	64.2	64.0	62.2	0.3	3.2	—	—	—	—	—	—
Nursing and Residential Care Facilities	59.8	59.3	58.5	0.8	2.2	—	—	—	—	—	—
Social Assistance	63.3	63.9	59.7	-0.9	6.1	—	—	—	—	—	—
Leisure and Hospitality	179.2	184.1	170.2	-2.7	5.3	—	—	—	—	—	—
Arts, Entertainment, and Recreation	30.3	33.0	26.6	-8.2	13.6	—	—	—	—	—	—
Accommodation and Food Services	148.9	151.1	143.5	-1.5	3.8	299.68	288.15	22.1	22.6	13.56	12.75
Food Services and Drinking Places	135.9	138.2	129.8	-1.7	4.7	285.85	281.63	21.3	21.9	13.42	12.86
Other Services	78.9	78.8	79.3	0.1	-0.5	—	—	—	—	—	—
Repair and Maintenance	14.4	14.4	14.3	-0.1	0.2	—	—	—	—	—	—
Religious, Grantmaking, Civic, Professional Organizations	42.3	42.3	42.8	-0.1	-1.1	—	—	—	—	—	—
Government	251.2	249.7	253.7	0.6	-1.0	—	—	—	—	—	—
Federal Government	20.7	20.6	20.5	0.4	1.2	—	—	—	—	—	—
State Government	71.2	71.0	71.7	0.3	-0.8	—	—	—	—	—	—
State Government Education	44.8	44.6	45.6	0.4	-1.6	—	—	—	—	—	—
Local Government	159.3	158.1	161.5	0.7	-1.3	—	—	—	—	—	—
Local Government Education	88.5	87.6	89.0	1.0	-0.5	—	—	—	—	—	—

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, 2015.

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

	Nov 2015	Oct 2015	Nov 2014	Oct 2015	Nov 2014
TOTAL NONFARM WAGE AND SALARY	136,878	137,900	135,580	-0.7%	1.0%
GOODS-PRODUCING	16,902	17,406	16,611	-2.9	1.8
Mining, Logging, and Construction	9,691	10,166	9,405	-4.7	3.0
Manufacturing	7,211	7,240	7,206	-0.4	0.1
SERVICE-PROVIDING	119,976	120,494	118,969	-0.4	0.8
Trade, Transportation, and Utilities	25,807	25,938	26,090	-0.5	-1.1
Wholesale Trade	3,363	3,366	3,381	-0.1	-0.5
Retail Trade	15,535	15,671	16,081	-0.9	-3.4
Transportation, Warehouse, Utilities	6,909	6,901	6,628	0.1	4.2
Information	1,387	1,365	1,418	1.6	-2.2
Financial Activities	5,585	5,445	5,382	2.6	3.8
Professional and Business Services	8,605	8,637	8,456	-0.4	1.8
Educational and Health Services	31,958	31,912	31,392	0.1	1.8
Leisure and Hospitality	13,024	13,750	12,858	-5.3	1.3
Other Services	6,070	6,118	6,077	-0.8	-0.1
Government	27,540	27,329	27,296	0.8	0.9

Rochester MSA

Jobs % Chg. From

	Nov 2015	Oct 2015	Nov 2014	Oct 2015	Nov 2014
TOTAL NONFARM WAGE AND SALARY	115,753	115,884	115,644	-0.1%	0.1%
GOODS-PRODUCING	15,190	15,506	15,084	-2.0	0.7
Mining, Logging, and Construction	4,377	4,441	4,265	-1.4	2.6
Manufacturing	10,813	11,065	10,819	-2.3	-0.1
SERVICE-PROVIDING	100,563	100,378	100,560	0.2	0.0
Trade, Transportation, and Utilities	18,348	18,025	18,101	1.8	1.4
Wholesale Trade	2,567	2,582	2,635	-0.6	-2.6
Retail Trade	12,662	12,365	12,452	2.4	1.7
Transportation, Warehouse, Utilities	3,119	3,078	3,014	1.3	3.5
Information	2,138	2,137	2,024	0.0	5.6
Financial Activities	2,723	2,721	2,787	0.1	-2.3
Professional and Business Services	5,674	5,740	5,836	-1.1	-2.8
Educational and Health Services	45,570	45,592	45,451	0.0	0.3
Leisure and Hospitality	9,721	9,895	9,964	-1.8	-2.4
Other Services	3,644	3,683	3,627	-1.1	0.5
Government	12,745	12,585	12,770	1.3	-0.2

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

	Nov 2015	Oct 2015	Nov 2014	Oct 2015	Nov 2014
TOTAL NONFARM WAGE AND SALARY	107,428	107,970	107,899	-0.5%	-0.4%
GOODS-PRODUCING	21,390	21,714	21,512	-1.5	-0.6
Mining, Logging, and Construction	5,963	6,211	6,151	-4.0	-3.1
Manufacturing	15,427	15,503	15,361	-0.5	0.4
SERVICE-PROVIDING	86,038	86,256	86,387	-0.3	-0.4
Trade, Transportation, and Utilities	21,814	21,684	22,001	0.6	-0.8
Wholesale Trade	4,840	4,801	4,668	0.8	3.7
Retail Trade	13,024	12,949	13,542	0.6	-3.8
Transportation, Warehouse, Utilities	3,950	3,934	3,791	0.4	4.2
Information	1,579	1,585	1,600	-0.4	-1.3
Financial Activities	4,762	4,889	4,796	-2.6	-0.7
Professional and Business Services	8,182	8,194	8,412	-0.1	-2.7
Educational and Health Services	21,507	21,702	21,555	-0.9	-0.2
Leisure and Hospitality	8,585	8,848	8,778	-3.0	-2.2
Other Services	3,629	3,659	3,662	-0.8	-0.9
Government	15,980	15,695	15,583	1.8	2.5

Mankato MSA

Jobs % Chg. From

	Nov 2015	Oct 2015	Nov 2014	Oct 2015	Nov 2014
TOTAL NONFARM WAGE AND SALARY	56,520	56,879	57,305	-0.6	-1.4%
GOODS-PRODUCING	10,405	10,514	10,300	-1.0	1.0
Mining, Logging, and Construction	--	--	--	--	--
Manufacturing	--	--	--	--	--
SERVICE-PROVIDING	46,115	46,365	47,005	-0.5	-1.9
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	9,540	9,508	9,733	0.3	-2.0

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

	Nov 2015	Oct 2015	Nov 2014	Oct 2015	Nov 2014
TOTAL NONFARM WAGE AND SALARY	143,058	142,476	141,945	0.4%	0.8%
GOODS-PRODUCING	19,248	19,564	19,552	-1.6	-1.6
Mining, Logging, and Construction	9,090	9,414	9,172	-3.4	-0.9
Manufacturing	10,158	10,150	10,380	0.1	-2.1
SERVICE-PROVIDING	123,810	122,912	122,393	0.7	1.2
Trade, Transportation, and Utilities	31,246	30,672	31,728	1.9	-1.5
Wholesale Trade	9,282	9,309	9,277	-0.3	0.1
Retail Trade	16,829	16,226	17,179	3.7	-2.0
Transportation, Warehouse, Utilities	5,135	5,137	5,272	0.0	-2.6
Information	3,203	3,216	3,316	-0.4	-3.4
Financial Activities	10,862	10,854	10,554	0.1	2.9
Professional and Business Services	16,369	16,553	16,273	-1.1	0.6
Educational and Health Services	21,837	21,751	21,823	0.4	0.1
Leisure and Hospitality	15,369	15,109	14,540	1.7	5.7
Other Services	5,388	5,369	5,279	0.4	2.1
Government	19,536	19,388	18,880	0.8	3.5

Grand Forks-East Grand Forks MSA

Jobs % Chg. From

	Nov 2015	Oct 2015	Nov 2014	Oct 2015	Nov 2014
TOTAL NONFARM WAGE AND SALARY	59,784	59,579	59,067	0.3%	1.2%
GOODS-PRODUCING	7,600	7,782	7,314	-2.3	3.9
Mining, Logging, and Construction	3,606	3,737	3,310	-3.5	8.9
Manufacturing	3,994	4,045	4,004	-1.3	-0.3
SERVICE-PROVIDING	52,184	51,797	51,753	0.8	0.8
Trade, Transportation, and Utilities	13,858	13,627	13,398	1.7	3.4
Wholesale Trade	1,969	1,978	2,010	-0.5	-2.0
Retail Trade	9,531	9,323	9,094	2.2	4.8
Transportation, Warehouse, Utilities	2,358	2,326	2,294	1.4	2.8
Information	614	613	606	0.2	1.3
Financial Activities	1,776	1,775	1,748	0.1	1.6
Professional and Business Services	3,043	3,067	3,137	-0.8	-3.0
Educational and Health Services	9,678	9,631	9,563	0.5	1.2
Leisure and Hospitality	6,415	6,389	6,343	0.4	1.1
Other Services	2,159	2,160	2,121	-0.1	1.8
Government	14,641	14,535	14,837	0.7	-1.3

Source: Department of Employment and Economic Development, Current Employment Statistics, and North Dakota Job Service, 2015.

Minnesota Economic Indicators

Highlights

The **Minnesota Index** advanced 0.2 percent for the second month in a row in November, fueled by an uptick in wage and salary employment, a jump in average weekly manufacturing hours, and the third straight month of a declining unemployment rate. November's 3.5 percent seasonally adjusted unemployment rate is the lowest in over 14 years. The U.S. Index also climbed 0.2 percent.

The Minnesota Index, which is a proxy for economic growth in Minnesota, averaged 0.3 percent growth during the first quarter, 0.2 percent growth during the second quarter, and 0.1 percent growth during the third quarter. The 0.2 percent average increase over the last two months indicates that Minnesota's economy has regained some of its momentum that was lost during the middle of the year. Minnesota's index is up 2.4 percent from a year ago while the U.S. index is up 3.1 over the same period. Minnesota's index has been increasing at a slower rate than the national index since December 2013.

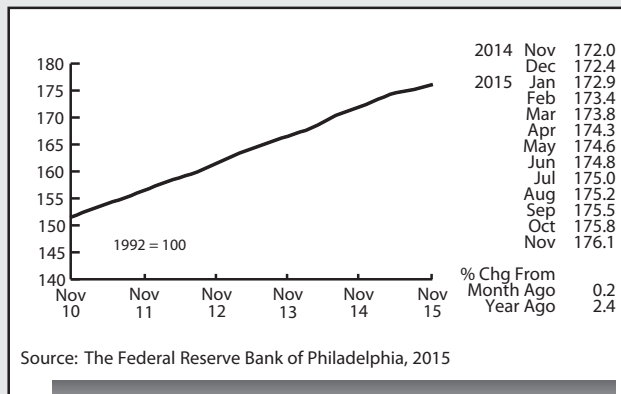
Adjusted **Wage and Salary Employment** increased by 7,200 jobs in November, the largest monthly job gain since May. Most of the payroll expansion occurred in the private sector which added 6,200 jobs. Eight of the 11 super sectors added jobs. The warm weather helped boost construction jobs by 3,300 jobs. Professional and Business Services, Leisure and Hospitality, and Trade, Transportation, and Utilities

added the next most jobs. Local government hiring accounted for more than half the 1,000 job gain in the public sector.

Minnesota's unadjusted over-the-year job growth ticked up to 1.1 percent in November. Minnesota's annual average job growth looks to be headed to 1.4 percent for 2015, up slightly from 1.3 percent last year but significantly behind the U.S. rate for the second year in a row. Minnesota's 2015 job growth will likely lag behind Iowa (1.6 percent), South Dakota (1.7 percent), and Wisconsin (1.6 percent) but ahead of North Dakota (0.6 percent), at least until employment data is benchmarked in March next year. Iowa, South Dakota, and North Dakota all have unemployment rates below Minnesota so not all of Minnesota's slower job growth can be blamed on the state's tight labor market.

Minnesota's adjusted **online Help-Wanted Ads** skyrocketed to a record high of 142,400 in November. Online help-wanted postings increased 6.0 percent in Minnesota and 4.3 percent nationally. Minnesota's online help-wanted level is 12.6 percent higher than a year ago compared to 8.6 percent higher nationwide. This suggests that labor demand is higher in Minnesota than nationally and that Minnesota's slow job growth can be at least partially blamed on the state's tight labor market.

Minnesota's **Purchasing Managers' Index (PMI)** slipped further in November to 41.1, its lowest level since March 2009. The low reading indicates that Minnesota manufacturing activity has slowed as exports have waned, caused by a strong dollar and weak global economic growth. November's reading is the 18th lowest in the 10-year history of the index. All but three of the lower readings occurred during the 2001 or 2008-09 recessions.



Minnesota Index

Adjusted **Manufacturing Hours** rebounded partially in November, climbing to 40.4. The factory workweek, however, remains significantly lower than a year ago. Manufacturing hours last year set a 45-year record high averaging 41.7 hours per week. This year's average will be right around 40.5 hours which matches the 44-year average. **Manufacturing Earnings** inched up for the second straight month in November to \$825.14 but remain slightly lower in real terms than last year's factory paycheck.

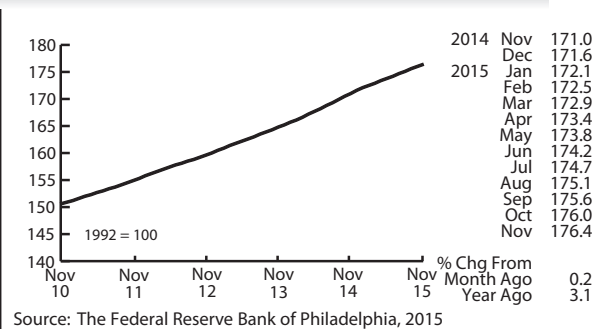
Revisions to the **Minnesota Leading Index** were positive in November as the index now shows increases over the last six months, implying that economic activity in the state will be gaining strength over the next six months. This reading contradicts the direction of the state's economy predicted by the Minnesota PMI.

Adjusted **Residential Building Permits** dipped slightly to 1,794 in November but remained solid enough to indicate that Minnesota's home-building activity remains on its slow but steady path to recovery. Building permit numbers bottomed out in 2010 and have been slowly and unevenly rebounding since. November's 1,794 permits are 15 percent below the 45-year monthly average of 2,114.

Adjusted **Initial Claims for Unemployment Benefits (UB)** ramped up in November, topping 20,000 for the first time since last November. Initial claim levels, however, remain low, suggesting that the job growth will continue to hover in the 1.0 to 1.5 range.

by Dave Senf

United States Index



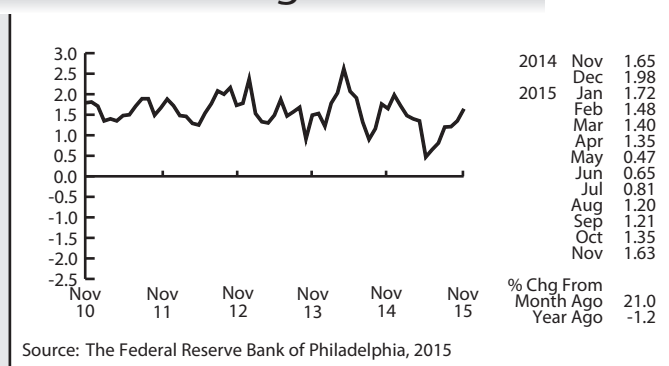
Note: All data except for Minnesota's PMI have been seasonally adjusted. See the feature article in the Minnesota Employment Review, May 2010, for more information on the Minnesota Index.

Minnesota Economic Indicators

Wage and Salary Employment



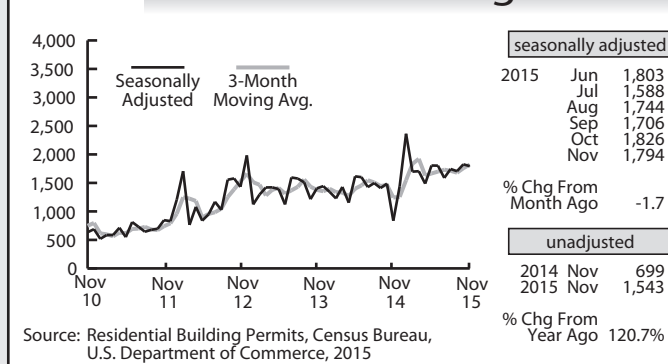
Minnesota Leading Index



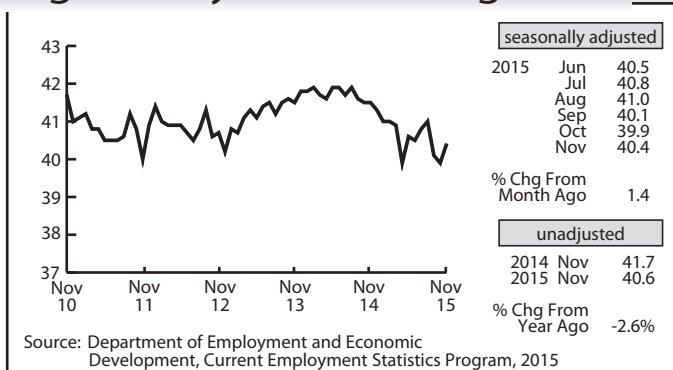
Purchasing Managers' Index



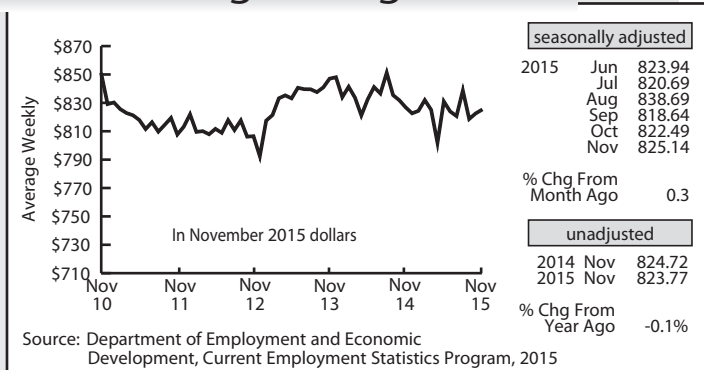
Residential Building Permits



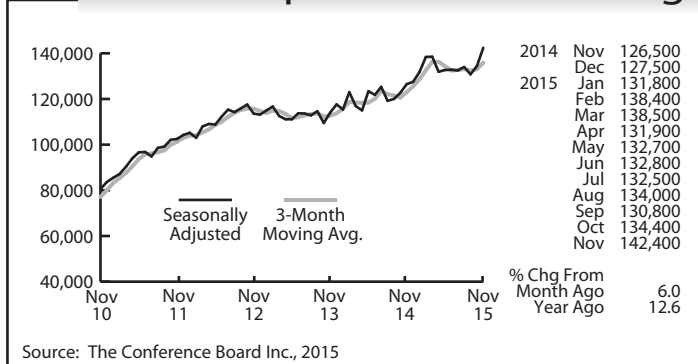
Average Weekly Manufacturing Hours



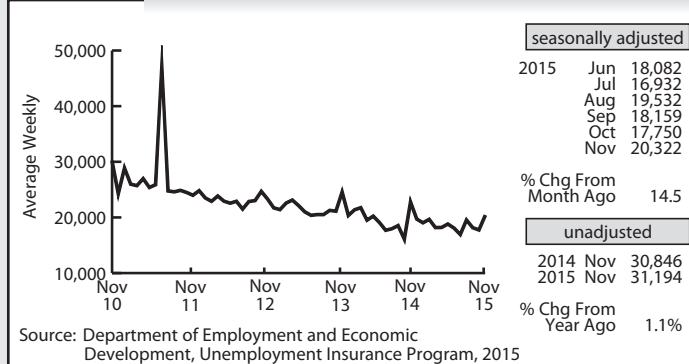
Manufacturing Earnings



Online Help-Wanted Advertising



Initial UB Claimants



Review

Minnesota Employment



DEED

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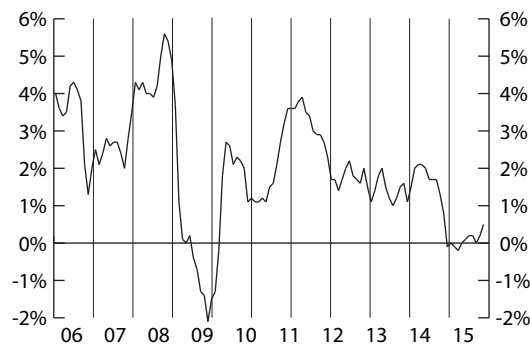
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U.S. Consumer Price Index for All Urban Consumers (CPI-U)

The Consumer Price Index for All Urban Consumers (CPI-U) was unchanged in November on a seasonally adjusted basis the U.S. Bureau of Labor Statistics reported. The energy index fell 1.3 percent, with all of the major component indices declining except electricity. The food index fell 0.1 percent, and the index for food at home fell 0.3 percent. The index for all items less food and energy rose 0.2 percent, the same increase as in September and October.

The all items index rose 0.5 percent over the last 12 months, the largest 12 month increase since the 12-month period ending December 2014.

Percent Change From One Year Ago



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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What's Going On?

Job-Support Funding for People with Mental Illness

DEED's Vocational Rehabilitation Services unit has awarded grants totaling \$475,000 for services to help people with mental illnesses return to work.

The grants went to Guild Incorporated, St. Paul, \$160,979; Goodwill Easter Seals, St. Paul, \$153,585; and Rise Inc., Minneapolis, \$160,436. The organizations will provide clients with Individual Placement and Support (IPS) services, an employment model that helps people with serious mental illnesses achieve employment in mainstream, competitive jobs.

These three grants, scheduled to start in February, will help begin the expansion of the IPS model into previously unserved parts of the state.

Minnesota
Department of Employment and Economic Development

LRT and Employment Growth

In June of 2014 the Green Line, a light rail train connecting downtown Minneapolis and downtown Saint Paul, opened to the public after several years of construction and more years of planning and debate. Stakeholders hoped for economic benefits beyond making transportation more efficient, but measuring the economic effects is a challenging proposition. It's difficult to distinguish analytically between effects resulting from the construction or running of a train and those of the economic cycle or broader industry effects. For example, major public investment occurred in conjunction with green line route selection: Wilder Research, Twins Ballpark, Vikings stadium, Saints Ballpark, Union Depot remodel, and the Gopher Stadium. These are substantial expenditures with highly visible and well-used end products that may not have occurred without the concurrent light rail development. But because government bodies have a significant role, different parties may weight their

economic significance differently. This analysis is a survey of the employment data near the Green Line – it endeavors to relate growth in a narrowly defined region to the period of construction, but is not comprehensive enough to determine if the Green Line is a success or failure from an economic standpoint.

Methodology

In the Labor Market Information office our primary data sources focus on employment and business establishment data, therefore this analysis will look at what changes we've seen in the available data and what economic implications those may have. There are limitations to these metrics - while businesses rarely add employment unless they're thriving, the role of workers varies quite a bit by industry. Some businesses are very sensitive to business cycles and location factors, others are largely stable. The timing of the Green Line construction occurred simultaneously with economic recovery, and isolating infrastructure effects from economic cycle effects is tricky. The location of the Green Line connects two downtowns; there is no way of knowing if growth is a result of boom in one or both of them or related to transit accessibility.

There is a natural comparison between the Blue Line and the Green Line, but the two are very distinct. The Blue Line is designed much more for park and ride, with destination connections like airport, MOA and downtown Minneapolis. There is broad spacing between stops, and some stretches of the line are sparsely populated. The Green Line is more like a streetcar, with stops roughly every half mile, and connects both downtowns along an established commercial corridor. Instead of expansive parking lots, there is on-street metered parking, and rather than office parks and destination retail, there is a mix of small and large employers and different economic uses of property.

Geography

For analysis purposes there are six geographic summary areas. The first is the area that falls within one half-mile of any station on the Green Line – roughly the area that people would walk to after riding the train. This area is indicated by line fill. The half-mile zone has been further sub-divided into the area near

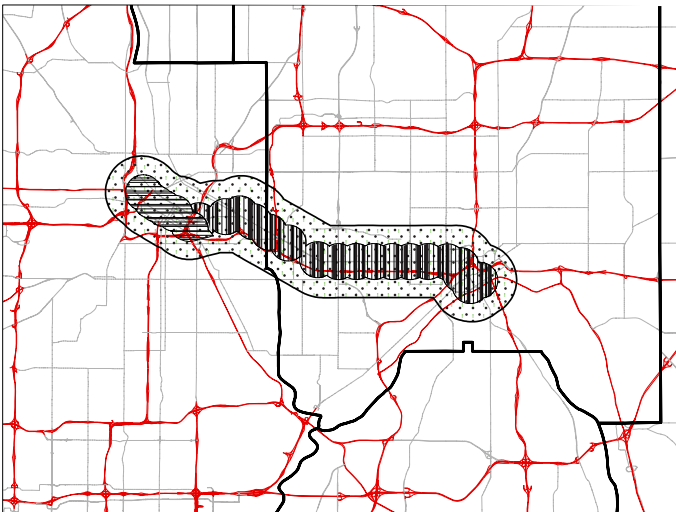


Photos: Courtesy Metro Transit

stops that already existed as part of the Hiawatha (now Blue) Line and the area near newly opened stops. By separating the two we may be able to compare employment trends that are a result of outside factors with those that are a product of new development. While Downtown Minneapolis is unique in the state for the concentration and mix of companies, its closest comparison is downtown Saint Paul, so while matching the areas up is imperfect, it's better than any other option. The new area is indicated by vertical lines and the old area is horizontal lines in the first geographic summary area.

A larger buffer zone of one mile is the next area, designated by dots. It includes all of the half-mile zone, but is larger to pick up trends that reach a little further. The 7-county metro region is also included as well as the statewide totals for comparison. The metro and the state are areas published on our website and are aggregated differently than the smaller areas because of the way the data are collected and aggregated. Because they're so large, this is unlikely to have a dramatic effect on this analysis, but is worth noting.

Map 1



Time Periods

For each area, data were compared for three time periods: second quarter 2014, the last quarter before the Green Line opened, second quarter 2015, the period where the Green Line had been opened for a year, and second quarter 2010, before construction began. Comparing all second quarter data should minimize seasonal effects.

Establishments and the QCEW

Although the concept of a business establishment may seem very straightforward, the way it's tracked and defined can vary quite a bit between data sources. In the Quarterly Census of Employment and Wages (QCEW), which is built on Unemployment Insurance (UI) data and uses similar definitions, a business is designated by a UI Account number. For each account number, there are also reporting units. Generally separate locations of the same business are assigned different reporting units, so for the purposes of this analysis a business establishment is each distinct UI Account and Reporting Unit

combination. In some cases particularly large businesses will report departments under different reporting units, even if they're housed in the same building complex. There are also occasional oddities where a business may be reporting incorrectly, not breaking out data by location. While these can create problems in analyzing very small areas, for the size of these areas the aggregate counts should be reliable.

Analysis

Before, during, and immediately after construction various analyses of the project were published. Each report has a different aim and scope. This one is no different. LMI largely tracks employment, and the goal of this report is to track changes to employment and industry mix in the broader Green Line region.

Businesses

Because government employment is insulated against the effects of the construction the counts of businesses used are only Private establishments. Government agencies are excluded.

During construction the number of establishments along the Green Line dropped precipitously. The entire metro was struggling, with a decline of 2 percent in the number of firms, but the new portion of the line saw a decline of 4.5 percent of firms or 119 fewer establishments located in the area. While some may have moved temporarily or permanently this is a significantly larger drop than in the metro as a whole. Near the established stops, the number of firms remained stable. In the larger one-mile area, declines were on par with metro-wide change, indicating that construction took a measurable toll on the businesses operating in the near vicinity of the Green Line.

Interestingly, the effects lingered beyond the construction period. The change in the number of establishments fell another 2.4 percent, 61 establishments, from second quarter 2014 to second quarter 2015 in the construction zone. The zone around the established stops again fared better, falling only 0.7 percent or 21 establishments. Metro-wide the number of establishments fell 1 percent, and the larger one mile zone fell 1.7 percent. While it appears that the particular time period was a little rough on the urban center generally, the construction zone did not see an immediate boom in the number of new businesses as soon as the rail line opened. It should be noted, however, that development takes time, and some planned new businesses may not yet be opened even a year later.

Employment

Despite the declines in the number of establishments, employment grew through this time period. Statewide, there was a 7.6 percent increase from second quarter 2010 to second quarter 2014, and it was mirrored with similar growth in the 7 County Metro and near the established Blue Line stops. Predictably, the construction zone saw only a 2.7 percent increase, substantially lower than the state and comparison area. The one-mile zone also saw less growth – only 4.4 percent (10,653 jobs) for the period. This may be a result of the

particular industry mix in that region or may be a result of delayed development because of the construction.

In the period immediately following construction, the first year the Green Line was operating, private employment actually outpaced growth in all other areas of analysis. Private employment grew 2.9 percent (2,323 jobs) in the former construction zone, compared to 0.9 percent growth around the established stops and 2.0 percent in the metro and statewide.

Industry Mix

The change in what industries are most represented in our areas of analysis also illuminates some trends. For Table 3 employment in all ownerships, which includes both private employment and government employment, was used. The two largest industries in the construction zone are Educational and Health Services and Public Administration. With 40.9 percent and 21.9 percent of current employment respectively, these two both dwarf all other industries and are substantially more significant to the region than in the metro as a whole, where they make up 26.0 percent and 7.4 percent of employment. With the bulk of both the Saint Paul city government and State Capital employment included in the area, the high proportion of Public Administration employment is to be expected. Hospitals and colleges, such as the University of Minnesota's main campus, that serve the broader region also

	2010	2014	2015	2010-2014 % Change	2014-2015 % Change
Old	3,116	3,115	3,094	0.0%	-0.7%
New	2,657	2,538	2,477	-4.5%	-2.4%
Half mile	5,773	5,653	5,571	-2.1%	-1.5%
One mile	8,053	7,888	7,756	-2.0%	-1.7%
7 County Metro	77,789	76,209	75,429	-2.0%	-1.0%
Statewide	154,737	156,892	156,823	1.4%	0.0%

	2010	2014	2015	2010-2014 % Change	2014-2015 % Change
Old	109,094	116,954	117,982	7.2%	0.9%
New	77,355	79,419	81,742	2.7%	2.9%
Half mile	186,449	196,373	199,724	5.3%	1.7%
One mile	240,980	251,653	255,685	4.4%	1.6%
7 County Metro	1,346,564	1,450,454	1,479,515	7.7%	2.0%
Statewide	2,197,330	2,364,880	2,412,004	7.6%	2.0%

like the central location of the line both for their employees and their clients, so those are well-represented as well.

The industries that are most under-represented relative to the metro as a whole are Construction, Manufacturing, and Professional and Business Services. Construction and Manufacturing tend to need large areas that are zoned differently than the commercial areas along the Green Line, and the industries tend to be less in need of a central location since

customers are unlikely to come to their offices. Professional and Business Services is located either in the prestige area in downtown Minneapolis or in the suburbs where businesses can build a corporate headquarters to their specifications. This is reflected in the proportion for the zone around established Minneapolis stops – at 29.4 percent of employment, Professional and Business Services is substantially more significant than in the metro as a whole (14.8 percent).

Table 3: Employment by Industry for Selected Areas, Second Quarter 2010, Second Quarter 2014, Second Quarter 2015

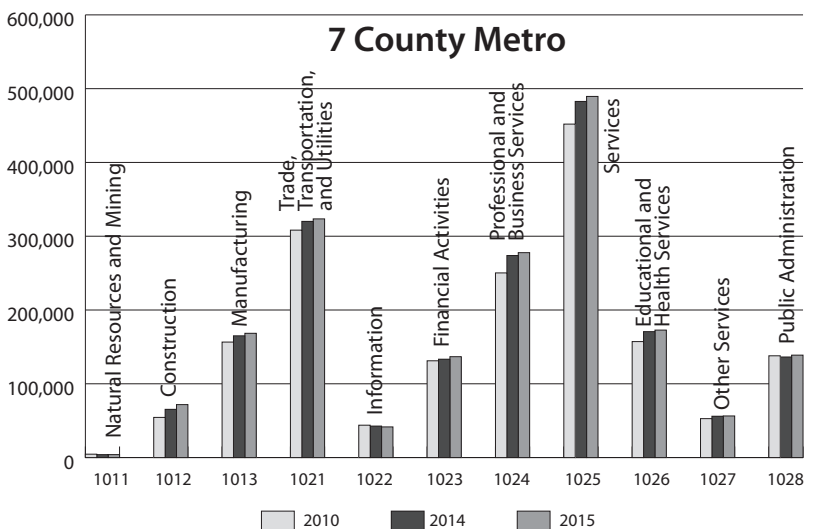
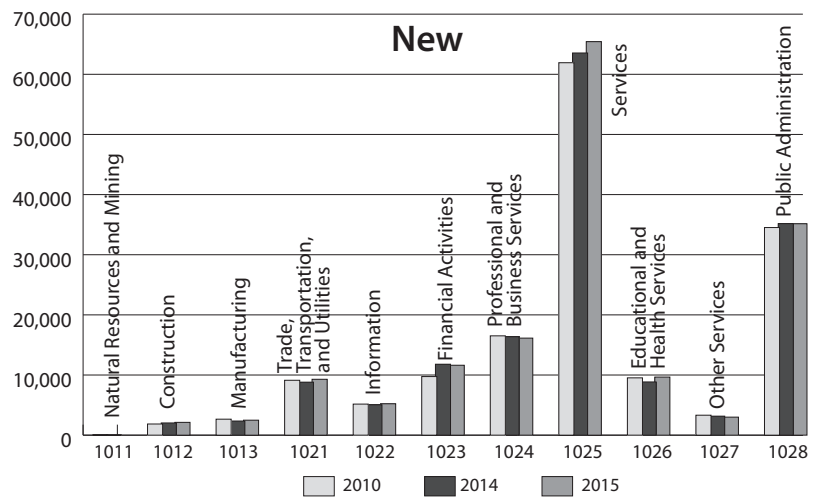
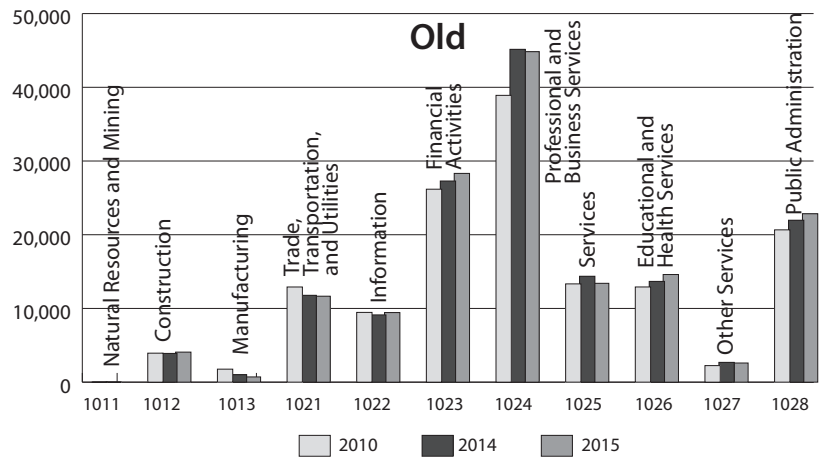
	Old				New				7 County Metro			
	2015	2010%	2014%	2015%	2015	2010%	2014%	2015%	2015	2010%	2014%	2015%
Natural Resources and Mining	1	0.0%	0.0%	0.0%	24	0.0%	0.0%	0.0%	4,031	0.3%	0.2%	0.2%
Construction	4,076	2.8%	2.6%	2.7%	2,128	1.2%	1.3%	1.3%	71,790	3.1%	3.5%	3.8%
Manufacturing	711	1.2%	0.7%	0.5%	2,491	1.7%	1.5%	1.6%	168,426	9.0%	8.9%	9.0%
Trade, Transportation, and Utilities	11,661	9.1%	7.8%	7.6%	9,291	5.9%	5.6%	5.8%	323,498	17.6%	17.3%	17.2%
Information	9,440	6.6%	6.0%	6.2%	5,220	3.3%	3.2%	3.3%	41,559	2.5%	2.3%	2.2%
Financial Activities	28,320	18.4%	18.1%	18.6%	11,626	6.3%	7.5%	7.3%	136,748	7.5%	7.2%	7.3%
Professional and Business Services	44,832	27.3%	29.9%	29.4%	16,137	10.7%	10.4%	10.1%	277,741	14.3%	14.8%	14.8%
Educational and Health Services	13,409	9.4%	9.5%	8.8%	65,429	40.1%	40.4%	40.9%	489,471	25.8%	26.1%	26.0%
Leisure and Hospitality	14,602	9.1%	9.1%	9.6%	9,660	6.2%	5.6%	6.0%	172,781	9.0%	9.2%	9.2%
Other Services	2,598	1.6%	1.8%	1.7%	2,998	2.2%	2.0%	1.9%	56,400	3.0%	3.0%	3.0%
Public Administration	22,844	14.5%	14.6%	15.0%	35,152	22.4%	22.4%	21.9%	138,828	7.9%	7.4%	7.4%

Perhaps even more important than the industry mix overall is how it has changed through time. In the construction zone the share of employment in Professional and Business Services has been on the decline, falling from 10.7 percent of employment to 10.1 percent. Leisure and Hospitality and Trade, Transportation, and Utilities both fell in 2014 but bounced back to nearly 2010 levels by 2015. Since Leisure and Hospitality includes restaurants, which were likely very sensitive to being made inaccessible by construction, this trend is a good sign. Financial Activities had a reverse trend, but that is likely more reflective of the declines elsewhere, since Financial Activities are larger businesses in this area and are somewhat insulated against construction effects. Educational and Health Services, the largest industry in the area by a large margin, has been on a moderate growth trajectory and is driving the overall gains present in the area.

Conclusion

Although development continues near the Green Line, early indications are that employment in the region is not suffering, but it is changing. While before there was room for a mix of industries and a number of smaller businesses, the businesses that came out of the construction period most strongly were in the Educational and Health Services industry, which tend to be hospitals and other large employers. Public Administration also fared well despite the construction. In some respects this is a trend we'd expect based on our comparison area in downtown Minneapolis – independent of transit and construction projects, the region is also heavily weighted toward employment in Professional and Business Services, an industry that is similar to Education and Health Care in the area, since they're larger establishments and in a centralized location, and government employment. Given that these are the city centers of the largest cities in the largest metro of the state, employment for industries for which centralization is important will naturally be strongest in the area.

Following the growth of this area for a longer time will be necessary. It's difficult to say if University Avenue will bounce back to its former retail mix or if the train will precipitate the downtowns growing together.



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