Minnesota
Department of Employment and Economic Development

Review ONLINE

# Minnesota Employment Review

http://mn.gov/deed/review

November 2013 Data...December 2013 Issue


## Making You Feel At Home

Real estate agents say that a house feels empty until there is furniture in it, and then it feels more like a home, making it easier to sell. Central Minnesota is home to more than one-fourth of the state's employment in furniture and related product manufacturing, including one-third of the state's jobs in kitchen cabinet manufacturing.

Through 2012 the 13-county Central Minnesota planning region was home to 122 Furniture and Related Product Manufacturing establishments, providing 2,285 covered jobs and just under $94 million in total payroll. The largest segment in the region is Household and Institutional Furniture and Kitchen Cabinet Manufacturing, which provided 1,897 jobs at 108 firms, with a payroll of $74.4 million. The region also has a small but significant concentration of employment in Office Furniture Manufacturing, offering 388 jobs at 14 firms (Table 1).

### *Couldn't Stand the Heat*

In the first half of the last decade demand for furniture and kitchen cabinets heated up along with the red-hot housing market, especially in Central Minnesota. From 2002 to 2006 total employment in kitchen cabinet manufacturing grew twice as fast in Central Minnesota (+23.4%) as in the state of Minnesota as a whole (+12.4%), with the Central

Table 1

**Central Minnesota Industry Employment Statistics, 2012**

| | | 2012 Annual Data | | | | |
|---|---|---|---|---|---|---|
| **NAICS Industry Title** | **NAICS Code** | **Number of Firms** | **Number of Jobs** | **Percent of Statewide Jobs** | **Total Payroll** | **Average Annual Wages** |
| **Total, All Industries** | **0** | **17,479** | **254,123** | **9.6%** | **$9,270,803,237** | **$36,452** |
| Furniture and Related Product Manufacturing | 337 | 122 | 2,285 | 26.5% | $93,647,713 | $40,976 |
| Household and Institutional Furniture and Kitchen Cabinet Manufacturing | 3371 | 108 | 1,897 | 34.2% | $74,410,703 | $39,208 |
| Office Furniture (including Fixtures) Manufacturing | 3372 | 14 | 388 | 15.2% | $19,237,010 | $49,556 |

Source: DEED Quarterly Census of Employment & Wages (QCEW) program

Feature:

A New Minimum?

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Regional Spotlight CENTRAL MINNESOTA

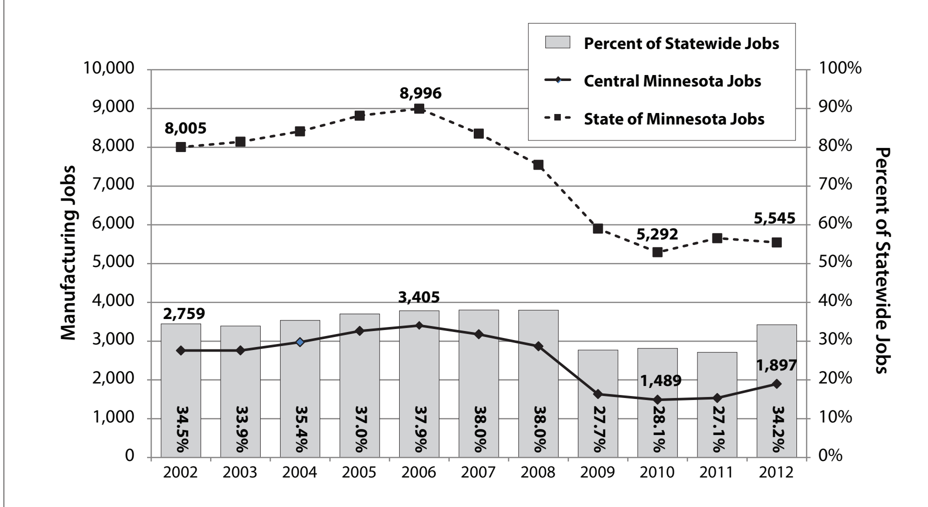
region accounting for 38 percent of statewide employment at the high point of the industry in 2006.

But as the housing market cooled off, the craving for kitchen cabinets also went cold. From the peak in 2006 to the trough in 2010, Central Minnesota sliced more than 56 percent of its jobs in Household Furniture and Kitchen Cabinet Manufacturing, while the state lost 41.2 percent. Office furniture manufacturers rolled back more than one-third of their jobs in the state (-33.7%) and one-fourth of the jobs in the region (-27.7%).

As the housing industry has recovered and building has restarted, Kitchen Cabinet Manufacturing has started to simmer again. Jobs in Central Minnesota jumped 27.4 percent from 2010 to 2012, which was more than five times as fast as the state as a whole, which gained 4.8 percent (Figure 1).

Figure 1

**Household Furniture and Kitchen Cabinet Manufacturing Jobs, 2002 - 2012**



Source: DEED QCEW program

## Restocking the Cupboards

Despite the recent gains the Household and Institutional Furniture and Kitchen Cabinet Manufacturing sector still has only two-thirds of the jobs it started with in 2002, and would need to add almost 1,500 more jobs to get back to the employment peak reached in 2006. That would require several years of unprecedented growth — the region gained less than half that many jobs from 2002 to 2006 — and simply may never be attained again.

However, the sector has already outperformed DEED's Employment Projections for the next decade. According to DEED's industry projections, the Household and Institutional Furniture and Kitchen Cabinet Manufacturing sector was expected to grow from 1,490 jobs in 2010 to 1,730 jobs in 2020, but as shown above, was already closing in on 1,900 jobs in 2012. If the sector keeps adding jobs at the current rate — just over 200 net new jobs per year — it would surpass the previous record in 2019.

Job growth in Office Furniture Manufacturing was much more measured in the last two years, increasing by just 1 percent in Central Minnesota and 6.2 percent statewide. But the Office Furniture Manufacturing sector is expected to see much faster growth in the next decade, expanding as much as 40 percent through 2020, which would bring it back to the previous employment peak.

Long term, the fate of the industry is closely tied to the housing market, so more ups and downs are likely on the way. Job growth may heat up again as people start moving and building new houses or remodeling their kitchens, or employment may level off or drop again if they stay in place (Table 2).

## Good Things Come in Small Packages

Not surprisingly, many Household and Institutional Furniture and Kitchen Cabinet manufacturers responded to the downturn by downsizing their operations. In 2006 there were an average of 26 employees at each of the 133 Household and Institutional Furniture and Kitchen Cabinet Manufacturing establishments in Central Minnesota and 30 employees at each of the 18 Office Furniture Manufacturers. By 2010 the average firm had downsized to 14 and 24 employees, respectively, while the number of firms dropped to 107 and 14, respectively.

Most of the remaining furniture manufacturers are small businesses, including 83.3 percent that have less than 20 employees, and 53.9 percent that had between one and four employees. Instead, only four furniture manufacturers in the region had 100 or more employees, with three of those building kitchen cabinets and the other building office furniture (Figure 2).

Table 2

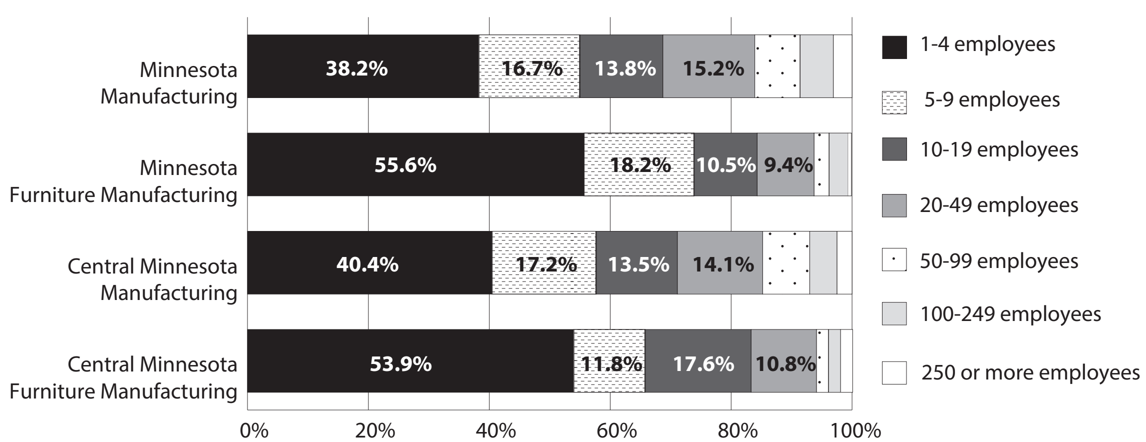
**Central Minnesota Industry Employment Projections, 2010 to 2020**

| NAICS Industry Title | NAICS Code | Estimated Employment 2010 | Projected Employment 2020 | Percent Change 2010 - 2020 | Numeric Change 2010 - 2020 |
|---|---|---|---|---|---|
| **Total, All Industries** | **0** | **281,615** | **333,237** | **+18.3%** | **+51,622** |
| Furniture and Related Product Manufacturing | 337 | 1,875 | 2,270 | +21.1% | +395 |
| Household and Institutional Furniture and Kitchen Cabinet Manufacturing | 3371 | 1,490 | 1,730 | +16.1% | +240 |
| Office Furniture (including Fixtures) Manufacturing | 3372 | 385 | 540 | +40.3% | +155 |

Source: DEED 2010 to 2020 Employment Projections

Figure 2

**Manufacturing Employers by Size Class, 2011**




Source: U.S. Census Bureau, County Business Patterns

## *Measure Twice, Cut Once*

Fortunately, the remaining employees are accustomed to the cutting, having been trained to cut, saw, and finish furniture and cabinets. Job seekers may be interested because many of the jobs still available in the sector require a high school diploma or less and short- to moderate-term on-the-job training, yet pay above average wages and have above average growth rates.

More than half of the top occupations in demand are projected to grow faster than average in Central Minnesota, including the five occupations most closely tied to the industry: upholsterers, sawing machine operators, woodworking machine operators, carpenters, and cabinetmakers and bench carpenters.

As an example, cabinetmakers and bench carpenters earn a median hourly wage of $16.86 in Central Minnesota, compared to $16.14 for the total of all occupations, and are expected to grow 31.5 percent from 2010 to 2020, which is 13 percent faster than the total of all occupations. Entry-level cabinetmakers and bench carpenters typically need a high school diploma or equivalent, as well as three months to one year of on-the-job training.

Nine of the top 10 occupations in demand in both the Household and Institutional Furniture and Kitchen Cabinet Manufacturing sector and the Office Furniture Manufacturing sector can be gained with a high school diploma or less, with the lone exception being first-line supervisors of production workers, which often also require some sort of postsecondary non-degree award as well as related work experience (Table 3).

Table 3

## Occupations in Demand in Furniture & Related Product Manufacturing in Central Minnesota

| Occupational Title | Median Hourly Wage | Estimated Regional Employment 2010 | Projected Regional Employment 2020 | Percent Change 2010 - 2020 | Numeric Change 2010 - 2020 | 2010 - 2020 Replacement Openings* | Education Requirements | On-the-job Training Requirements |
|---|---|---|---|---|---|---|---|---|
| **Total, All Occupations** | **$16.14** | **281,615** | **333,237** | **+18.3%** | **+51,622** | **+66,890** | | |
| Cabinetmakers and Bench Carpenters | $16.86 | 482 | 634 | +31.5% | +152 | +120 | High school diploma or equivalent | Moderate term on-the-job training |
| Assemblers and Fabricators, All Other | $13.23 | 1,304 | 1,711 | +31.2% | +407 | +260 | High school diploma or equivalent | Moderate term on-the-job training |
| Carpenters | $20.90 | 2,107 | 2,745 | +30.3% | +638 | +450 | High school diploma or equivalent | Apprenticeship |
| Welders, Cutters, Solderers, and Brazers | $17.90 | 1,276 | 1,648 | +29.2% | +372 | +340 | High school diploma or equivalent | Moderate term on-the-job training |
| Woodworking Machine Operators | $13.99 | 316 | 393 | +24.4% | +77 | +30 | High school diploma or equivalent | Short term on-the-job training |
| Sawing Machine Operators | $16.04 | 163 | 201 | +23.3% | +38 | +40 | High school diploma or equivalent | Short term on the job training |
| Laborers and Freight, Stock, and Material Movers, Hand | $12.09 | 2,960 | 3,602 | +21.7% | +642 | +950 | Less than high school | Short term on-the-job training |
| Upholsterers | $14.56 | 96 | 116 | +20.8% | +20 | +20 | High school diploma or equivalent | Moderate term on-the-job training |
| Sales Representatives, Wholesale and Manufacturing | $26.96 | 2,228 | 2,612 | +17.2% | +384 | +520 | High school diploma or equivalent | Moderate term on-the-job training |
| Furniture Finishers | $8.83 | 39 | 45 | +15.4% | +6 | +10 | | |
| Industrial Truck and Tractor Operators | $16.99 | 842 | 970 | +15.2% | +128 | +240 | Less than high school | Short term on-the-job training |
| Helpers-Production Workers | $11.00 | 784 | 893 | +13.9% | +109 | +130 | Less than high school | Short term on-the-job training |
| First-Line Supervisors of Production Workers | $24.97 | 1,650 | 1,863 | +12.9% | +213 | +220 | Postsecondary non-degree award | None |
| Cutting, Punching, and Press Machine Operators | $14.44 | 909 | 1,026 | +12.9% | +117 | +70 | High school diploma or equivalent | Moderate term on-the-job training |
| Team Assemblers | $14.71 | 2,066 | 2,300 | +11.3% | +234 | +410 | High school diploma or equivalent | Moderate term on-the-job training |
| Shipping, Receiving, and Traffic Clerks | $14.91 | 1,210 | 1,311 | +8.3% | +101 | +310 | High school diploma or equivalent | Moderate term on-the-job training |
| Sewing Machine Operators | $10.75 | 139 | 143 | +2.9% | +4 | +10 | Less than high school | Short term on-the-job training |

Source: Bureau of Labor Statistics, DEED Occupational Employment & Wage Statistics (OES), DEED 2010-2020 Employment Projections

## *Cutting Class*

A high school education and one year of training can get a worker in the door, but new technology and more sophisticated machinery require workers to continue with their training. Becoming a skilled woodworker often takes three or more years, with workers needing to read blueprints, set up machines, and plan work sequences.

According to the Bureau of Labor Statistics' Occupational Outlook Handbook, "people seeking woodworking jobs can enhance their employment and advancement prospects by completing high school and getting training in computer applications and math."[1]

"Skill with computers and computer-controlled machinery is increasingly important. Those who have advanced skills, including in mathematics and computers, should have the best job opportunities in manufacturing industries."[2]

Job analysis shows that some woodworkers further their education at technical schools or community colleges, while others attend postsecondary training in wood technology, furniture manufacturing, wood engineering, and production management, all of which become more important as woodworking technology advances.

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[1]Woodworkers. www.bls.gov/ooh/production/woodworkers.htm
[2]Woodworkers. www.bls.gov/ooh/production/woodworkers.htm

Regional Spotlight CENTRAL MINNESOTA

# Measuring Minnesota

One key to building a healthy workforce is having an educated population, and education is an area where Minnesota shines. Relative to the nation and to our similarly high-achieving neighbors in the Midwest, Minnesota's workforce is very well-educated, providing a solid foundation for our strong economy.

Minnesota's population is among the best educated in the nation. According to the most recent estimates (2012) from the Current Population Survey (CPS), 92.5 percent of Minnesotans age 25 years and older are at least high school graduates, which is the highest rate among Midwest states as defined by the U.S. Census Bureau. As the table illustrates, every Midwestern state boasts an above average percentage of high school graduates relative to the national population: 89.2 percent of the Midwest population has a diploma or equivalent, versus 84.8 percent in the South and 85.1 in the West. Minnesota also has the highest proportion of bachelor's degree holders in the region at 33.2 percent. The Midwest does not, however, fare as well in this category, with only three states in the region coming in above the national average of 29.1 percent.

Minnesota also excels, on the opposite end of the education scale, as a region-low 3.1 percent of the population has less than a ninth grade education, compared to a national average of 5.8 percent. The Midwest region leads the way nationally in this category at 3.9 percent, with the next lowest being the Northeast region at 5.1 percent.

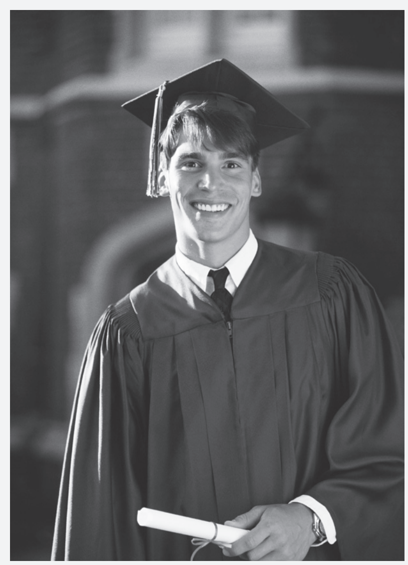
Some of Minnesota's high rate of education may be helped by the attractiveness of the Minneapolis-Saint Paul Metro to educated young people. The metro area ranked 11th in the nation for incoming migration of people ages 25-34 between 2010 and 2012.[1] This tracks with speculation that young people from neighboring areas such as Iowa, Wisconsin, and the Dakotas often move to the more opportunity-rich Twin Cities once they complete their education.

Regardless of the cause, the high education rates of Minnesota's population bode well for the continued health of our economy.

## Educational Attainment of Population, 25 Years and Over

| State | Percent high school graduate or higher | Percent bachelor's degree or higher |
|---|---|---|
| **Minnesota** | **92.5%** | **33.2%** |
| North Dakota | 91.7% | 27.9% |
| Iowa | 91.6% | 26.3% |
| Wisconsin | 90.7% | 27.1% |
| Nebraska | 90.5% | 29.0% |
| South Dakota | 90.5% | 26.3% |
| Kansas | 90.2% | 30.4% |
| Michigan | 89.2% | 26.0% |
| Ohio | 88.8% | 25.2% |
| Missouri | 88.0% | 26.4% |
| Illinois | 87.6% | 31.6% |
| Indiana | 87.6% | 23.4% |
| United States | 86.4% | 29.1% |

Source: U.S. Census Bureau, 2012 American Community Survey, One-year estimates



*by Nick Dobbins*

[1]2012 Current Population Survey 3-year estimates, U.S. Census Bureau. Analysis by William H. Frey at the Brookings Institute: **www.brookings.edu/research/opinions/2013/11/15-millennial-senior-post-recession-frey#**

See also: **http://blogs.wsj.com/washwire/2013/11/14/millennials-flock-to-washington-after-abandoning-city-in-recession/?mod=wsj_streaming_stream**

# Labor Force Estimates

Numbers are unadjusted unless otherwise labeled.
Source: Department of Employment and Economic Development, Local Area Unemployment Statistics, and North Dakota Job Service, 2013.

| County/Area | Labor Force | | | Employment | | | Unemployment | | | Rate of Unemployment | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Nov 2013 | Oct 2013 | Nov 2012 | Nov 2013 | Oct 2013 | Nov 2012 | Nov 2013 | Oct 2013 | Nov 2012 | Nov 2013 | Oct 2013 | Nov 2012 |
| **United States ('000s)** | | | | | | | | | | | | |
| (Seasonally adjusted) | 155,294 | 154,839 | 155,319 | 144,386 | 143,568 | 143,277 | 10,907 | 11,272 | 12,042 | 7.0% | 7.3% | 7.8% |
| (Unadjusted) | 155,046 | 154,918 | 154,953 | 144,775 | 144,144 | 143,549 | 10,271 | 10,773 | 11,404 | 6.6 | 7.0 | 7.4 |
| **Minnesota** | | | | | | | | | | | | |
| (Seasonally adjusted) | 2,965,652 | 2,964,556 | 2,974,038 | 2,828,209 | 2,822,202 | 2,811,535 | 137,443 | 142,354 | 162,503 | 4.6 | 4.8 | 5.5 |
| (Unadjusted) | 2,969,149 | 2,966,842 | 2,970,560 | 2,846,125 | 2,844,965 | 2,824,951 | 123,024 | 121,877 | 145,609 | 4.1 | 4.1 | 4.9 |
| **Metropolitan Statistical Areas (MSA)*** | | | | | | | | | | | | |
| Mpls.-St. Paul MSA | 1,873,618 | 1,870,441 | 1,868,444 | 1,799,261 | 1,794,090 | 1,778,542 | 74,357 | 76,351 | 89,902 | 4.0 | 4.1 | 4.8 |
| Duluth-Superior MSA | 144,985 | 142,941 | 144,719 | 137,200 | 135,505 | 136,149 | 7,785 | 7,436 | 8,570 | 5.4 | 5.2 | 5.9 |
| Rochester MSA | 104,087 | 103,792 | 104,743 | 100,525 | 100,163 | 100,668 | 3,562 | 3,629 | 4,075 | 3.4 | 3.5 | 3.9 |
| St. Cloud MSA | 108,820 | 108,809 | 108,158 | 104,436 | 104,539 | 103,083 | 4,384 | 4,270 | 5,075 | 4.0 | 3.9 | 4.7 |
| Mankato-N Mankato MSA | 58,039 | 58,081 | 58,479 | 56,246 | 56,133 | 56,151 | 1,793 | 1,948 | 2,328 | 3.1 | 3.4 | 4.0 |
| Fargo-Moorhead MSA | 117,377 | 118,522 | 119,191 | 114,375 | 115,799 | 115,551 | 3,002 | 2,723 | 3,640 | 2.6 | 2.3 | 3.1 |
| Grand Forks MSA | 53,847 | 53,703 | 54,418 | 52,240 | 52,348 | 52,563 | 1,607 | 1,355 | 1,855 | 3.0 | 2.5 | 3.4 |
| **Region One** | **51,060** | **50,702** | **51,033** | **49,002** | **48,960** | **48,788** | **2,058** | **1,742** | **2,245** | **4.0** | **3.4** | **4.4** |
| Kittson | 2,657 | 2,688 | 2,674 | 2,564 | 2,596 | 2,565 | 93 | 92 | 109 | 3.5 | 3.4 | 4.1 |
| Marshall | 5,419 | 5,449 | 5,477 | 5,100 | 5,195 | 5,114 | 319 | 254 | 363 | 5.9 | 4.7 | 6.6 |
| Norman | 3,601 | 3,653 | 3,627 | 3,459 | 3,512 | 3,453 | 142 | 141 | 174 | 3.9 | 3.9 | 4.8 |
| Pennington | 9,425 | 9,393 | 9,478 | 9,061 | 9,058 | 9,088 | 364 | 335 | 390 | 3.9 | 3.6 | 4.1 |
| Polk | 18,745 | 18,293 | 18,510 | 18,018 | 17,745 | 17,763 | 727 | 548 | 747 | 3.9 | 3.0 | 4.0 |
| Red Lake | 2,415 | 2,397 | 2,403 | 2,294 | 2,302 | 2,283 | 121 | 95 | 120 | 5.0 | 4.0 | 5.0 |
| Roseau | 8,798 | 8,829 | 8,864 | 8,506 | 8,552 | 8,522 | 292 | 277 | 342 | 3.3 | 3.1 | 3.9 |
| **Region Two** | **39,539** | **39,479** | **39,966** | **37,044** | **37,335** | **37,157** | **2,495** | **2,144** | **2,809** | **6.3** | **5.4** | **7.0** |
| Beltrami | 21,949 | 21,745 | 22,233 | 20,710 | 20,629 | 20,786 | 1,239 | 1,116 | 1,447 | 5.6 | 5.1 | 6.5 |
| Clearwater | 4,090 | 4,022 | 4,080 | 3,701 | 3,725 | 3,710 | 389 | 297 | 370 | 9.5 | 7.4 | 9.1 |
| Hubbard | 8,935 | 9,063 | 9,043 | 8,311 | 8,552 | 8,344 | 624 | 511 | 699 | 7.0 | 5.6 | 7.7 |
| Lake of the Woods | 2,145 | 2,189 | 2,167 | 2,011 | 2,078 | 2,020 | 134 | 111 | 147 | 6.2 | 5.1 | 6.8 |
| Mahnomen | 2,420 | 2,460 | 2,443 | 2,311 | 2,351 | 2,297 | 109 | 109 | 146 | 4.5 | 4.4 | 6.0 |
| **Region Three** | **167,780** | **166,169** | **168,218** | **158,112** | **157,413** | **157,634** | **9,668** | **8,756** | **10,584** | **5.8** | **5.3** | **6.3** |
| Aitkin | 7,195 | 7,274 | 7,229 | 6,727 | 6,894 | 6,724 | 468 | 380 | 505 | 6.5 | 5.2 | 7.0 |
| Carlton | 17,680 | 17,442 | 17,764 | 16,821 | 16,616 | 16,726 | 859 | 826 | 1,038 | 4.9 | 4.7 | 5.8 |
| Cook | 2,937 | 3,123 | 2,957 | 2,783 | 2,989 | 2,797 | 154 | 134 | 160 | 5.2 | 4.3 | 5.4 |
| Itasca | 23,102 | 23,021 | 23,515 | 21,631 | 21,704 | 21,801 | 1,471 | 1,317 | 1,714 | 6.4 | 5.7 | 7.3 |
| Koochiching | 6,521 | 6,502 | 6,496 | 5,913 | 6,001 | 5,913 | 608 | 501 | 583 | 9.3 | 7.7 | 9.0 |
| Lake | 6,135 | 6,258 | 6,141 | 5,812 | 5,983 | 5,804 | 323 | 275 | 337 | 5.3 | 4.4 | 5.5 |
| St. Louis | 104,210 | 102,549 | 104,116 | 98,425 | 97,226 | 97,869 | 5,785 | 5,323 | 6,247 | 5.6 | 5.2 | 6.0 |
| City of Duluth | 45,586 | 45,083 | 45,723 | 43,493 | 42,963 | 43,247 | 2,093 | 2,120 | 2,476 | 4.6 | 4.7 | 5.4 |
| Balance of St. Louis County | 58,624 | 57,466 | 58,393 | 54,932 | 54,263 | 54,622 | 3,692 | 3,203 | 3,771 | 6.3 | 5.6 | 6.5 |
| **Region Four** | **125,507** | **125,482** | **125,643** | **120,949** | **121,470** | **120,560** | **4,558** | **4,012** | **5,083** | **3.6** | **3.2** | **4.0** |
| Becker | 17,523 | 17,441 | 17,635 | 16,739 | 16,766 | 16,738 | 784 | 675 | 897 | 4.5 | 3.9 | 5.1 |
| Clay | 35,329 | 34,885 | 35,033 | 34,263 | 34,052 | 33,866 | 1,066 | 833 | 1,167 | 3.0 | 2.4 | 3.3 |
| Douglas | 20,572 | 20,699 | 20,773 | 19,850 | 20,028 | 19,945 | 722 | 671 | 828 | 3.5 | 3.2 | 4.0 |
| Grant | 3,254 | 3,297 | 3,247 | 3,122 | 3,175 | 3,090 | 132 | 122 | 157 | 4.1 | 3.7 | 4.8 |
| Otter Tail | 30,146 | 30,345 | 30,230 | 28,845 | 29,175 | 28,815 | 1,301 | 1,170 | 1,415 | 4.3 | 3.9 | 4.7 |
| Pope | 6,541 | 6,632 | 6,533 | 6,325 | 6,434 | 6,310 | 216 | 198 | 223 | 3.3 | 3.0 | 3.4 |
| Stevens | 6,609 | 6,663 | 6,656 | 6,449 | 6,493 | 6,473 | 160 | 170 | 183 | 2.4 | 2.6 | 2.7 |
| Traverse | 1,649 | 1,672 | 1,644 | 1,588 | 1,604 | 1,581 | 61 | 68 | 63 | 3.7 | 4.1 | 3.8 |
| Wilkin | 3,884 | 3,848 | 3,892 | 3,768 | 3,743 | 3,742 | 116 | 105 | 150 | 3.0 | 2.7 | 3.9 |
| **Region Five** | **80,833** | **81,214** | **81,639** | **75,764** | **77,069** | **76,101** | **5,069** | **4,145** | **5,538** | **6.3** | **5.1** | **6.8** |
| Cass | 13,298 | 13,369 | 13,579 | 12,297 | 12,590 | 12,424 | 1,001 | 779 | 1,155 | 7.5 | 5.8 | 8.5 |
| Crow Wing | 31,659 | 31,984 | 32,106 | 29,546 | 30,248 | 29,849 | 2,113 | 1,736 | 2,257 | 6.7 | 5.4 | 7.0 |
| Morrison | 17,284 | 17,282 | 17,282 | 16,274 | 16,467 | 16,216 | 1,010 | 815 | 1,066 | 5.8 | 4.7 | 6.2 |
| Todd | 12,339 | 12,325 | 12,376 | 11,770 | 11,840 | 11,734 | 569 | 485 | 642 | 4.6 | 3.9 | 5.2 |
| Wadena | 6,253 | 6,254 | 6,296 | 5,877 | 5,924 | 5,878 | 376 | 330 | 418 | 6.0 | 5.3 | 6.6 |
| **Region Six East** | **63,048** | **64,021** | **63,920** | **60,366** | **61,442** | **60,558** | **2,682** | **2,579** | **3,362** | **4.3** | **4.0** | **5.3** |
| Kandiyohi | 23,829 | 23,807 | 24,131 | 22,955 | 22,970 | 23,107 | 874 | 837 | 1,024 | 3.7 | 3.5 | 4.2 |
| McLeod | 18,829 | 19,295 | 19,130 | 17,953 | 18,437 | 17,971 | 876 | 858 | 1,159 | 4.7 | 4.4 | 6.1 |
| Meeker | 12,295 | 12,352 | 12,412 | 11,748 | 11,849 | 11,698 | 547 | 503 | 714 | 4.4 | 4.1 | 5.8 |
| Renville | 8,095 | 8,567 | 8,247 | 7,710 | 8,186 | 7,782 | 385 | 381 | 465 | 4.8 | 4.4 | 5.6 |

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

Numbers are unadjusted unless otherwise labeled.
Source: Department of Employment and Economic Development, Local Area Unemployment Statistics, and North Dakota Job Service, 2013.

| County/ Area | Labor Force | | | Employment | | | Unemployment | | | Rate of Unemployment | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Nov 2013 | Oct 2013 | Nov 2012 | Nov 2013 | Oct 2013 | Nov 2012 | Nov 2013 | Oct 2013 | Nov 2012 | Nov 2013 | Oct 2013 | Nov 2012 |
| **Region Six West** | **25,059** | **25,225** | **25,124** | **24,150** | **24,331** | **24,106** | **909** | **894** | **1,018** | **3.6%** | **3.5%** | **4.1%** |
| Big Stone | 2,827 | 2,881 | 2,829 | 2,737 | 2,788 | 2,720 | 90 | 93 | 109 | 3.2 | 3.2 | 3.9 |
| Chippewa | 7,340 | 7,350 | 7,373 | 7,081 | 7,098 | 7,075 | 259 | 252 | 298 | 3.5 | 3.4 | 4.0 |
| Lac Qui Parle | 4,168 | 4,211 | 4,135 | 4,021 | 4,066 | 3,994 | 147 | 145 | 141 | 3.5 | 3.4 | 3.4 |
| Swift | 5,119 | 5,147 | 5,128 | 4,900 | 4,943 | 4,891 | 219 | 204 | 237 | 4.3 | 4.0 | 4.6 |
| Yellow Medicine | 5,605 | 5,636 | 5,659 | 5,411 | 5,436 | 5,426 | 194 | 200 | 233 | 3.5 | 3.5 | 4.1 |
| **Region Seven East** | **84,266** | **83,885** | **84,397** | **79,762** | **79,855** | **79,089** | **4,504** | **4,030** | **5,308** | **5.3** | **4.8** | **6.3** |
| Chisago | 28,773 | 28,568 | 28,701 | 27,484 | 27,406 | 27,181 | 1,289 | 1,162 | 1,520 | 4.5 | 4.1 | 5.3 |
| Isanti | 20,807 | 20,713 | 20,856 | 19,904 | 19,848 | 19,685 | 903 | 865 | 1,171 | 4.3 | 4.2 | 5.6 |
| Kanabec | 7,992 | 7,964 | 7,946 | 7,375 | 7,465 | 7,285 | 617 | 499 | 661 | 7.7 | 6.3 | 8.3 |
| Mille Lacs | 12,395 | 12,344 | 12,542 | 11,574 | 11,615 | 11,581 | 821 | 729 | 961 | 6.6 | 5.9 | 7.7 |
| Pine | 14,299 | 14,296 | 14,352 | 13,425 | 13,521 | 13,357 | 874 | 775 | 995 | 6.1 | 5.4 | 6.9 |
| **Region Seven West** | **228,640** | **227,658** | **227,766** | **219,067** | **218,846** | **216,450** | **9,573** | **8,812** | **11,316** | **4.2** | **3.9** | **5.0** |
| Benton | 22,514 | 22,472 | 22,328 | 21,497 | 21,518 | 21,219 | 1,017 | 954 | 1,109 | 4.5 | 4.2 | 5.0 |
| Sherburne | 49,794 | 49,386 | 49,637 | 47,548 | 47,414 | 47,024 | 2,246 | 1,972 | 2,613 | 4.5 | 4.0 | 5.3 |
| Stearns | 86,306 | 86,337 | 85,831 | 82,939 | 83,021 | 81,864 | 3,367 | 3,316 | 3,967 | 3.9 | 3.8 | 4.6 |
| Wright | 70,026 | 69,463 | 69,970 | 67,083 | 66,893 | 66,343 | 2,943 | 2,570 | 3,627 | 4.2 | 3.7 | 5.2 |
| **Region Eight** | **68,572** | **69,144** | **68,746** | **66,388** | **66,536** | **66,218** | **2,184** | **2,608** | **2,528** | **3.2** | **3.8** | **3.7** |
| Cottonwood | 6,429 | 6,517 | 6,431 | 6,191 | 5,995 | 6,109 | 238 | 522 | 322 | 3.7 | 8.0 | 5.0 |
| Jackson | 7,227 | 7,350 | 7,208 | 7,036 | 7,090 | 6,981 | 191 | 260 | 227 | 2.6 | 3.5 | 3.1 |
| Lincoln | 3,510 | 3,565 | 3,541 | 3,403 | 3,458 | 3,421 | 107 | 107 | 120 | 3.0 | 3.0 | 3.4 |
| Lyon | 14,877 | 14,913 | 14,981 | 14,389 | 14,421 | 14,425 | 488 | 492 | 556 | 3.3 | 3.3 | 3.7 |
| Murray | 5,921 | 6,001 | 5,912 | 5,739 | 5,806 | 5,719 | 182 | 195 | 193 | 3.1 | 3.2 | 3.3 |
| Nobles | 11,338 | 11,389 | 11,367 | 10,991 | 11,002 | 10,989 | 347 | 387 | 378 | 3.1 | 3.4 | 3.3 |
| Pipestone | 5,673 | 5,676 | 5,652 | 5,508 | 5,514 | 5,466 | 165 | 162 | 186 | 2.9 | 2.9 | 3.3 |
| Redwood | 8,246 | 8,333 | 8,325 | 7,925 | 8,006 | 7,955 | 321 | 327 | 370 | 3.9 | 3.9 | 4.4 |
| Rock | 5,351 | 5,400 | 5,329 | 5,206 | 5,244 | 5,153 | 145 | 156 | 176 | 2.7 | 2.9 | 3.3 |
| **Region Nine** | **131,728** | **132,838** | **132,531** | **126,778** | **127,867** | **126,536** | **4,950** | **4,971** | **5,995** | **3.8** | **3.7** | **4.5** |
| Blue Earth | 38,492 | 38,516 | 38,753 | 37,247 | 37,173 | 37,184 | 1,245 | 1,343 | 1,569 | 3.2 | 3.5 | 4.0 |
| Brown | 15,066 | 15,072 | 15,102 | 14,466 | 14,530 | 14,442 | 600 | 542 | 660 | 4.0 | 3.6 | 4.4 |
| Faribault | 7,404 | 7,669 | 7,466 | 7,075 | 7,351 | 7,073 | 329 | 318 | 393 | 4.4 | 4.1 | 5.3 |
| Le Sueur | 14,419 | 14,621 | 14,448 | 13,663 | 13,963 | 13,597 | 756 | 658 | 851 | 5.2 | 4.5 | 5.9 |
| Martin | 10,972 | 11,060 | 11,014 | 10,531 | 10,596 | 10,488 | 441 | 464 | 526 | 4.0 | 4.2 | 4.8 |
| Nicollet | 19,547 | 19,565 | 19,727 | 18,999 | 18,960 | 18,967 | 548 | 605 | 760 | 2.8 | 3.1 | 3.9 |
| Sibley | 10,228 | 10,550 | 10,258 | 9,886 | 10,224 | 9,839 | 342 | 326 | 419 | 3.3 | 3.1 | 4.1 |
| Waseca | 10,090 | 10,212 | 10,213 | 9,641 | 9,781 | 9,684 | 449 | 431 | 529 | 4.4 | 4.2 | 5.2 |
| Watonwan | 5,510 | 5,573 | 5,550 | 5,270 | 5,289 | 5,262 | 240 | 284 | 288 | 4.4 | 5.1 | 5.2 |
| **Region Ten** | **271,410** | **271,155** | **273,624** | **261,421** | **260,956** | **261,712** | **9,989** | **10,199** | **11,912** | **3.7** | **3.8** | **4.4** |
| Dodge | 11,102 | 11,056 | 11,144 | 10,689 | 10,651 | 10,704 | 413 | 405 | 440 | 3.7 | 3.7 | 3.9 |
| Fillmore | 11,223 | 11,336 | 11,226 | 10,809 | 10,923 | 10,722 | 414 | 413 | 504 | 3.7 | 3.6 | 4.5 |
| Freeborn | 16,077 | 16,073 | 16,239 | 15,362 | 15,382 | 15,403 | 715 | 691 | 836 | 4.4 | 4.3 | 5.1 |
| Goodhue | 25,710 | 25,801 | 25,807 | 24,721 | 24,815 | 24,636 | 989 | 986 | 1,171 | 3.8 | 3.8 | 4.5 |
| Houston | 10,657 | 10,485 | 10,687 | 10,203 | 10,085 | 10,151 | 454 | 400 | 536 | 4.3 | 3.8 | 5.0 |
| Mower | 21,099 | 21,027 | 21,346 | 20,363 | 20,258 | 20,435 | 736 | 769 | 911 | 3.5 | 3.7 | 4.3 |
| Olmsted | 81,229 | 81,043 | 81,751 | 78,512 | 78,229 | 78,624 | 2,717 | 2,814 | 3,127 | 3.3 | 3.5 | 3.8 |
| City of Rochester | 59,293 | 59,148 | 59,638 | 57,232 | 57,026 | 57,314 | 2,061 | 2,122 | 2,324 | 3.5 | 3.6 | 3.9 |
| Rice | 32,136 | 32,131 | 32,412 | 30,785 | 30,724 | 30,708 | 1,351 | 1,407 | 1,704 | 4.2 | 4.4 | 5.3 |
| Steele | 21,146 | 21,290 | 21,794 | 20,398 | 20,509 | 20,829 | 748 | 781 | 965 | 3.5 | 3.7 | 4.4 |
| Wabasha | 11,757 | 11,693 | 11,847 | 11,324 | 11,283 | 11,340 | 433 | 410 | 507 | 3.7 | 3.5 | 4.3 |
| Winona | 29,274 | 29,220 | 29,371 | 28,255 | 28,097 | 28,160 | 1,019 | 1,123 | 1,211 | 3.5 | 3.8 | 4.1 |
| **Region Eleven** | **1,631,712** | **1,629,867** | **1,627,951** | **1,567,323** | **1,562,886** | **1,550,038** | **64,389** | **66,981** | **77,913** | **3.9** | **4.1** | **4.8** |
| Anoka | 191,227 | 190,629 | 191,231 | 183,358 | 182,839 | 181,336 | 7,869 | 7,790 | 9,895 | 4.1 | 4.1 | 5.2 |
| Carver | 51,512 | 51,378 | 51,348 | 49,560 | 49,419 | 49,013 | 1,952 | 1,959 | 2,335 | 3.8 | 3.8 | 4.5 |
| Dakota | 234,017 | 233,799 | 233,061 | 225,174 | 224,537 | 222,691 | 8,843 | 9,262 | 10,370 | 3.8 | 4.0 | 4.4 |
| Hennepin | 668,048 | 667,714 | 666,288 | 641,531 | 639,715 | 634,456 | 26,517 | 27,999 | 31,832 | 4.0 | 4.2 | 4.8 |
| City of Bloomington | 48,790 | 48,730 | 48,550 | 46,852 | 46,719 | 46,335 | 1,938 | 2,011 | 2,215 | 4.0 | 4.1 | 4.6 |
| City of Minneapolis | 218,377 | 218,432 | 217,795 | 209,148 | 208,556 | 206,842 | 9,229 | 9,876 | 10,953 | 4.2 | 4.5 | 5.0 |
| Ramsey | 276,521 | 276,298 | 276,213 | 265,135 | 264,385 | 262,211 | 11,386 | 11,913 | 14,002 | 4.1 | 4.3 | 5.1 |
| City of St. Paul | 147,933 | 147,867 | 147,830 | 141,445 | 141,045 | 139,885 | 6,488 | 6,822 | 7,945 | 4.4 | 4.6 | 5.4 |
| Scott | 75,596 | 75,537 | 75,488 | 72,840 | 72,634 | 72,037 | 2,756 | 2,903 | 3,451 | 3.6 | 3.8 | 4.6 |
| Washington | 134,791 | 134,512 | 134,322 | 129,725 | 129,357 | 128,294 | 5,066 | 5,155 | 6,028 | 3.8 | 3.8 | 4.5 |

# Industrial Analysis

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

## Overview

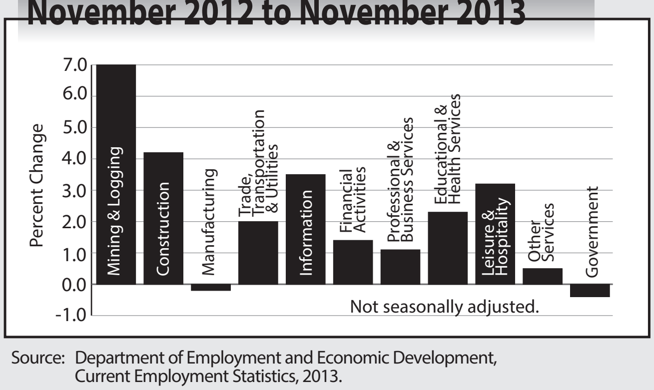
Employment inched down in November, slipping 800 jobs. Private Sector employment climbed 2,400, but that gain was offset by a loss of 3,200 in the Public Sector. Private Sector employment was split with 800 jobs in Private Goods Producing and 1,600 jobs in Private Service Providing. Local Government job cutbacks accounted for all of November's waning Public Sector employment. Information added the most workers increasing jobs 2.4 percent (1,300). Financial Activities rose 0.7 percent (1,200), and Other Services added 1,100 (0.9 percent). Manufacturing employment expanded for the third consecutive month, gaining 400 jobs (0.1 percent). Construction also added 400 jobs (0.4 percent). Government employment plunged 3,200 (0.8 percent). The other big loser was Professional and Business Services which fell 0.5 percent (1,600). Employment growth has zigzagged from one month to the next but has been spread evenly over the year averaging 3,200 jobs per month during the first half of the year and 3,100 per month over the last five months.

## Mining and Logging

Employment held steady for the third straight month at 7,500. Employment in the industry is the highest it's been since 2001, but employment growth this year is down from 2012. Most of the recent job growth has been in Mining.

## MN Employment Growth

**November 2012 to November 2013**




Source: Department of Employment and Economic Development, Current Employment Statistics, 2013.

## Construction

Construction employment inched up 400 (0.4 percent). Job growth for 2013 is running behind last year's pace. Employment in the industry is up 12,500 from the recessionary trough in May 2010 but still way below the housing boom peak of 132,000 reached in February 2006. The state lost 46,100 construction jobs from the 2006 peak to the 2010 bottom.

## Manufacturing

Manufacturing employment increased for the third straight month, but the gain was a moderate 400 (0.1 percent). Durable Goods Manufacturing added 100 jobs while Non-Durable Goods Manufacturing added 300. Manufacturing employment, after expanding in 2011 and 2012, stumbled during the first half of 2013 before starting to grow during the second half. The recent uptick will leave manufacturing employment at roughly the same level as a year ago.

## Trade, Transportation, and Utilities

With a small decline of 300 jobs Trade, Transportation, and Utilities saw a 0.1 percentage point drop on a seasonally adjusted basis for November. After climbing between April and August, Trade, Transportation, and Utilities payrolls have flattened out the last few months. All three component industries have added employment during the year. Wholesale Trade added 2,500 (1.9 percent), Retail Trade added 2,600 (0.9 percent), and Transportation, Warehousing, and Utilities added 2,300 (2.5 percent) jobs over the first 11 months of the year.

## Information

Information employment surged in November, jumping 2.4 percent (1,300). The sector, which has been shedding jobs since 2001, hasn't added that many jobs in one month since June 1996. The spike in hiring must be in Internet Service Providers, Web Search Portals, and Data Processing Services or Other Information Services since Publishing and Telecommunications workforces continue to shrink. This sector looks like it will experience annual job growth for the first time in 12 years.

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

## Financial Activities

Employment in Financial Activities rebounded in November, increasing 0.7 percent over the month (1,200). Financial Activities employment has been climbing since bottoming out in January 2010, but the pace has been uneven. If payroll numbers continue to expand at this month's pace, employment will soon exceed the all-time peak of 181.4 reached in March 2006. Finance and Insurance employment increased 300 (0.2 percent), while Real Estate and Rental and Leasing gained 900 workers (2.3 percent). This was the biggest monthly jump since September 2010.

## Professional and Business Services

Professional and Business Services employment declined for the fifth straight month, shedding 1,600 jobs over the month (0.5 percent). The industry added 14,000 workers during the first six months of the year but has cut 10,400 positions since June. Professional and Technical Services employment was up 100 (0.1 percent), and 400 jobs were added in Management of Companies (0.5 percent). But Administrative and Support Services employment tumbled 2,100 (1.6 percent).

## Educational and Health Services

Employment in Educational and Health Services took a breather from expanding in November with 200 jobs lost. Private Education increased 400 (0.6 percent), but Health and Social Assistance was down 600 (0.1 percent). This sector has added 8,500 (1.7 percent) with Health and Social Assistance accounting for most of the 8,000 jobs added since the beginning of the year.

## Leisure and Hospitality

In November, employment in Leisure and Hospitality barely changed with only 100 jobs added. Payrolls were down 600 (1.4 percent) in Arts, Entertainment, and Recreation and up 700 in Accommodation and Food Services (0.3 percent) in November. The industry has added 6,600 workers since the beginning of the year with most of the job expansion occurring in Accommodation and Food Service (up 5,600).

## Other Services

Employment in Other Services jumped 1,100 (0.9 percent) in November after having declined the previous two months. Employment as of November is 1.5 percent (1,800 jobs) below the pre-recession peak. Other Services employment is up 1,300 (1.1 percent) for the year.

## Government

Government employment slipped for the second straight month, shrinking 3,200 (0.8 percent). Local government payrolls were down 3,500 (1.2 percent) from last month while Federal Government employment increased 200 (0.6 percent), and State Government climbed by 100 (0.1 percent). Government employment is down 0.3 percent — 1,200 jobs — for the year. The job loss has been split between Federal Government (500), State Government (600), and Local Government (100).

*by Dave Senf*

## Seasonally Adjusted Nonfarm Employment

In 1,000's

| Industry | November 2013 | October 2013 | September 2013 |
|---|---|---|---|
| **Total Nonagricultural** | **2,786.5** | **2,787.3** | **2,776.4** |
| **Goods-Producing** | **411.2** | **410.4** | **404.8** |
| Mining and Logging | 7.5 | 7.5 | 7.5 |
| Construction | 98.4 | 98.0 | 96.4 |
| Manufacturing | 305.3 | 304.9 | 300.9 |
| **Service-Providing** | **2,375.3** | **2,376.9** | **2,371.6** |
| Trade, Transportation, and Utilities | 517.4 | 517.7 | 517.2 |
| Information | 56.4 | 55.1 | 55.1 |
| Financial Activities | 180.1 | 178.9 | 179.0 |
| Professional and Business Services | 341.5 | 343.1 | 344.2 |
| Educational and Health Services | 495.1 | 495.3 | 490.0 |
| Leisure and Hospitality | 253.5 | 253.4 | 250.4 |
| Other Services | 117.1 | 116.0 | 116.6 |
| Government | 414.2 | 417.4 | 419.1 |

Source: Department of Employment and Economic Development Current Employment Statistics, 2013.

# Regional Analysis

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

Employment slipped 6,604 (0.4 percent) over November and was up 32,818 (1.8 percent) over the year. Private employment dropped 7,234 (0.5 percent) for the month and was up 31,589 over the year (2.0 percent). Government employment increased 630 (0.3 percent) in November and 1,229 (0.5 percent) for the year.

Four private sectors lost jobs. Leisure and Hospitality employment declined by 6,112 jobs (3.6 percent). Other job losers were Mining, Logging, and Construction (down 3,879, 5.5 percent), Professional and Business Services (down 1,278, 0.5 percent), and Financial Activities (down 281, 0.2 percent). The big job gainer was Trade, Transportation, and Utilities (up 3,079, 1.0 percent). Local Government Education added 1,326 jobs (1.5 percent).

All private sectors have added jobs over the year with Educational and Health Services (11,620), Leisure and Hospitality (6,034), Mining, Logging, and Construction (5,093), Professional and Business Services (3,923), and Manufacturing (2,189) leading the way. Government employment is up 1,229 from a year ago with all the growth occurring in Local Government.

## Duluth -Superior MSA

Employment in the Duluth-Superior MSA climbed 579 (0.4 percent) over the month and 1,576 (1.2 percent) over the year. Over the month Private Sector employment rose 381 (0.4 percent) while Government employment climbed 198 (0.7 percent). Gains in the Private Sector were reported by Trade, Transportation, and Utilities (768), Educational and Health Services (163), and Information (105). Job losses were highest in Leisure and Hospitality (257), Mining, Logging, and Construction (242), Professional and Business Services (88), and Manufacturing (74). State Government employment (89) and Local Government employment (145) additions offset a Federal Government employment (36) decline. Over the year the Private Sector added 1,576 jobs (1.2 percent) while Government employment slipped by 328 jobs (1.2 percent). Mining, Logging, and Construction employment fell the most over the year (345, 4.3 percent) while Leisure and Hospitality added the most jobs (1,650, 12.3 percent).

## Rochester MSA

Employment in the Rochester MSA was basically unchanged in November as employment dropped by only 50 jobs over the month (0.0 percent) and increased 0.4 percent (452) over the year. Government employment rose 93 (0.9 percent) over the month, but Private Sector employment dropped 0.1 percent (143 jobs). Job cuts were highest in Manufacturing (down 232, 2.3 percent) and Professional and Business Services (down 170, 3.3 percent). The only significant job growth was in Trade, Transportation, and Utilities (up 531, 3.2 percent). Over the year Private Sector employment increased 452 (0.4 percent) with Trade, Transportation, and Utilities adding 650 jobs while Manufacturing cut 222 jobs. Government lost 358 jobs over the year with all three levels of government (Federal, State, and Local) cutting jobs.

## St. Cloud MSA

Employment in the St. Cloud MSA tailed off 251 (0.2 percent) over the month and increased 1,722 (1.7 percent) over the year. Government employment rose 182 (1.1 percent) from October while the Private Sector cut 455 jobs (0.5 percent). Employment dipped the most in Mining, Logging, and Construction (299, 4.9 percent) and Educational and Health Services (237, 1.2 percent). Hiring was highest in Trade, Transportation, and Utilities (457, 2.1 percent). State Government payrolls (125, 2.5 percent) expanded the most on the Public Sector side. Over the year employment growth was concentrated in the Private Sector as Government employment was up only 61 jobs from a year ago. Educational and Health Services (856), Mining, Logging, and Construction (803), and Trade, Transportation, and Utilities (381) added the most workers over the year.

## Mankato-North Mankato MSA

Employment in the Mankato-North Mankato MSA inched down 33 jobs (0.1 percent) over the month and increased 379 (0.7 percent) over the year. The Private Sector added 27 jobs last month (0.1 percent). Government employment decreased 60 jobs (0.6 percent) during November. All of the Private Sector gain was in Service-Providing industries (up 97, 0.3 percent). Over the year growth was mainly in the Private Sector which added 306 jobs (0.3 percent) while Government employment rose 73 (0.8 percent).

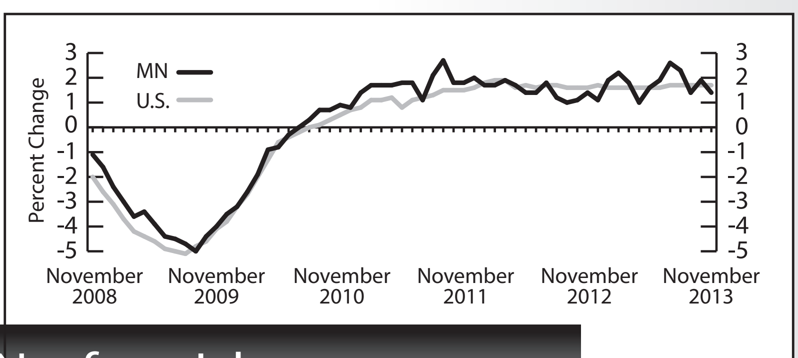
## Fargo-Moorhead MSA

Employment in the Fargo-Moorhead MSA dipped 444 (0.3 percent) over the month and 2,453 (1.90 percent) over the year. Government employment increased 144 (0.8 percent) over the month while Private Sector employment declined 588 (0.5 percent). The leading job generators over the month were Trade, Transportation, and Utilities (up 448, 1.5 percent) and Educational and Health Services (up 129, 0.6 percent). Job cuts were largest in Mining, Logging, and Construction (down 356, 3.6), Professional and Business Services (down 245, 1.6 percent), and Manufacturing (down 64, 0.6 percent).

## Grand Forks-East Grand Forks MSA

Employment in the Grand Forks-East Grand Forks MSA increased 322 (0.6 percent) over the month and 1,076 (1.9 percent) over the year. Government employment increased 138 (0.9 percent) in November while Private Sector employment jumped 184 (0.4 percent). Most of the monthly private employment gains were in Trade, Transportation, and Utilities (up 444, 3.4 percent) while job declines were mostly in Mining, Logging, and Construction (down 259, 5.0 percent) and Manufacturing (down 89, 2.3 percent).

*by Dave Senf*




Source: Department of Employment and Economic Development, Current Employment Statistics, 2013; Bureau of Labor Statistics, U.S. Department of Labor, Current Employment Statistics, 2013.

## Total Nonfarm Jobs

**U.S. and MN over-the-year percent change**

# Employer Survey of Minnesota Nonfarm Payroll Jobs, Hours and Earnings

Numbers are unadjusted.

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

| Industry | Jobs* (Thousands) | | | Percent Change From** | | Production Workers Hours and Earnings: Average Weekly Earnings | | Average Weekly Hours | | Average Hourly Earnings | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Nov 2013 | Oct 2013 | Nov 2012 | Oct 2013 | Nov 2012 | Nov 2013 | Nov 2012 | Nov 2013 | Nov 2012 | Nov 2013 | Nov 2012 |
| **TOTAL NONFARM WAGE AND SALARY** | **2,806.2** | **2,816.3** | **2,766.4** | **-0.4%** | **1.4%** | — | — | — | — | — | — |
| **GOODS-PRODUCING** | **416.7** | **422.6** | **412.8** | **-1.4** | **0.9** | — | — | — | — | — | — |
| **Mining and Logging** | **7.6** | **7.7** | **7.1** | **-1.9** | **7.0** | — | — | — | — | — | — |
| **Construction** | **103.6** | **109.2** | **99.4** | **-5.1** | **4.2** | — | — | — | — | — | — |
| Specialty Trade Contractors | 65.3 | 68.6 | 62.8 | -4.8 | 3.9 | $1,241.95 | $1,161.03 | 40.8 | 39.0 | $30.44 | $29.77 |
| **Manufacturing** | **305.5** | **305.7** | **306.3** | **-0.1** | **-0.2** | **832.83** | **782.14** | **41.6** | **40.8** | **20.02** | **19.17** |
| Durable Goods | 195.3 | 195.4 | 194.8 | -0.1 | 0.2 | 836.09 | 783.90 | 41.7 | 40.2 | 20.05 | 19.5 |
| Wood Product Manufacturing | 10.7 | 10.8 | 10.5 | -0.5 | 2.1 | — | — | — | — | — | — |
| Fabricated Metal Production | 41.7 | 41.7 | 41.7 | -0.2 | -0.2 | — | — | — | — | — | — |
| Machinery Manufacturing | 31.1 | 31.5 | 32.0 | -1.1 | -2.6 | — | — | — | — | — | — |
| Computer and Electronic Product | 45.1 | 45.0 | 45.1 | 0.2 | -0.1 | — | — | — | — | — | — |
| Navigational, Measuring, Electromedical and Control | 25.0 | 25.0 | 24.8 | 0.1 | 0.7 | — | — | — | — | — | — |
| Transportation Equipment | 10.2 | 10.2 | 10.6 | 0.1 | -4.2 | — | — | — | — | — | — |
| Medical Equipment and Supplies Manufacturing | 15.9 | 15.8 | 15.6 | 0.7 | 1.9 | — | — | — | — | — | — |
| Nondurable Goods | 110.2 | 110.2 | 111.4 | 0.0 | -1.1 | 827.17 | 778.96 | 41.4 | 41.7 | 19.98 | 18.68 |
| Food Manufacturing | 44.7 | 45.1 | 45.0 | -0.8 | -0.7 | — | — | — | — | — | — |
| Paper Manufacturing | 32.7 | 32.5 | 33.5 | 0.4 | -2.4 | — | — | — | — | — | — |
| Printing and Related | 23.0 | 22.9 | 23.4 | 0.3 | -1.7 | — | — | — | — | — | — |
| **SERVICE-PROVIDING** | **2,389.5** | **2,393.8** | **2,353.6** | **-0.2** | **1.5** | — | — | — | — | — | — |
| **Trade, Transportation, and Utilities** | **527.3** | **520.5** | **516.9** | **1.3** | **2.0** | — | — | — | — | — | — |
| Wholesale Trade | 132.9 | 133.0 | 129.9 | -0.1 | 2.3 | 1,005.44 | 948.48 | 39.6 | 38.0 | 25.39 | 24.96 |
| Retail Trade | 297.2 | 290.7 | 292.8 | 2.2 | 1.5 | 381.13 | 359.45 | 28.4 | 27.8 | 13.42 | 12.93 |
| Motor Vehicle and Parts | 31.3 | 31.3 | 30.9 | -0.2 | 1.3 | — | — | — | — | — | — |
| Building Material and Garden Equipment | 24.1 | 24.5 | 24.2 | -1.4 | -0.3 | — | — | — | — | — | — |
| Food and Beverage Stores | 51.0 | 50.9 | 50.6 | 0.1 | 0.6 | — | — | — | — | — | — |
| Gasoline Stations | 24.6 | 24.0 | 23.6 | 2.2 | 4.2 | — | — | — | — | — | — |
| General Merchandise Stores | 63.9 | 61.4 | 65.1 | 3.9 | -1.9 | 314.99 | 313.22 | 29.8 | 29.3 | 10.57 | 10.69 |
| Transportation,Warehouse, Utilities | 97.2 | 96.8 | 94.3 | 0.4 | 3.1 | — | — | — | — | — | — |
| Transportation and Warehousing | 84.4 | 83.9 | 81.5 | 0.7 | 3.6 | 621.72 | 679.95 | 36.0 | 39.1 | 17.27 | 17.39 |
| **Information** | **55.7** | **55.0** | **53.8** | **1.2** | **3.5** | **787.25** | **770.72** | **33.6** | **33.7** | **23.43** | **22.87** |
| Publishing Industries | 20.4 | 20.4 | 21.1 | -0.2 | -3.3 | — | — | — | — | — | — |
| Telecommunications | 13.5 | 13.5 | 13.6 | 0.2 | -0.5 | — | — | — | — | — | — |
| **Financial Activities** | **178.7** | **179.6** | **176.3** | **-0.5** | **1.4** | — | — | — | — | — | — |
| Finance and Insurance | 139.3 | 140.3 | 138.1 | -0.7 | 0.9 | 967.51 | 916.19 | 36.4 | 36.4 | 26.58 | 25.17 |
| Credit Intermediation | 53.9 | 54.4 | 53.6 | -0.9 | 0.5 | 780.44 | 740.52 | 35.8 | 36.0 | 21.8 | 20.57 |
| Securities, Commodity Contracts, and Other | 18.0 | 18.0 | 17.9 | 0.0 | 0.4 | — | — | — | — | — | — |
| Insurance Carriers and Related | 64.4 | 64.7 | 63.3 | -0.4 | 1.8 | — | — | — | — | — | — |
| Real Estate and Rental and Leasing | 39.5 | 39.3 | 38.2 | 0.3 | 3.2 | — | — | — | — | — | — |
| **Professional and Business Services** | **344.8** | **349.2** | **341.1** | **-1.3** | **1.1** | — | — | — | — | — | — |
| Professional, Scientific, and Technical Services | 131.8 | 133.4 | 130.9 | -1.2 | 0.6 | — | — | — | — | — | — |
| Legal Services | 19.0 | 19.1 | 18.8 | -0.3 | 1.1 | — | — | — | — | — | — |
| Accounting, Tax Preparation | 13.4 | 13.4 | 13.8 | 0.3 | -2.7 | — | — | — | — | — | — |
| Computer Systems Design | 31.4 | 31.7 | 31.2 | -1.1 | 0.6 | — | — | — | — | — | — |
| Management of Companies and Enterprises | 77.9 | 77.3 | 75.6 | 0.8 | 3.0 | — | — | — | — | — | — |
| Administrative and Support Services | 135.1 | 138.5 | 134.6 | -2.4 | 0.4 | — | — | — | — | — | — |
| **Educational and Health Services** | **499.2** | **497.8** | **488.0** | **0.3** | **2.3** | — | — | — | — | — | — |
| Educational Services | 69.8 | 68.4 | 69.3 | 2.0 | 0.7 | — | — | — | — | — | — |
| Health Care and Social Assistance | 429.4 | 429.4 | 418.7 | 0.0 | 2.6 | — | — | — | — | — | — |
| Ambulatory Health Care | 141.3 | 140.5 | 136.3 | 0.6 | 3.7 | 1,222.52 | 1,095.59 | 34.8 | 33.7 | 35.13 | 32.51 |
| Offices of Physicians | 68.3 | 68.3 | 66.0 | -0.1 | 3.5 | — | — | — | — | — | — |
| Hospitals | 103.1 | 103.5 | 103.3 | -0.4 | -0.2 | — | — | — | — | — | — |
| Nursing and Residential Care Facilities | 106.4 | 106.7 | 104.2 | -0.3 | 2.1 | 417.20 | 422.99 | 29.8 | 28.6 | 14 | 14.79 |
| Social Assistance | 78.6 | 78.7 | 75.0 | -0.1 | 4.9 | — | — | — | — | — | — |
| **Leisure and Hospitality** | **243.3** | **252.5** | **235.8** | **-3.6** | **3.2** | — | — | — | — | — | — |
| Arts, Entertainment, and Recreation | 36.3 | 41.3 | 35.2 | -12.1 | 2.9 | — | — | — | — | — | — |
| Accommodation and Food Services | 207.1 | 211.3 | 200.5 | -2.0 | 3.3 | — | — | — | — | — | — |
| Food Services and Drinking Places | 183.4 | 185.0 | 175.4 | -0.8 | 4.6 | 241.97 | 220.66 | 21.3 | 20.7 | 11.36 | 10.66 |
| **Other Services** | **117.7** | **117.0** | **117.2** | **0.7** | **0.5** | — | — | — | — | — | — |
| Religious, Grantmaking, Civic, Professional Organizations | 68.0 | 67.3 | 68.7 | 1.0 | -1.0 | — | — | — | — | — | — |
| **Government** | **422.8** | **422.1** | **424.5** | **0.2** | **-0.4** | — | — | — | — | — | — |
| Federal Government | 30.7 | 30.7 | 31.2 | 0.2 | -1.5 | — | — | — | — | — | — |
| State Government | 102.5 | 102.2 | 102.2 | 0.3 | 0.3 | — | — | — | — | — | — |
| State Government Education | 64.7 | 64.4 | 65.2 | 0.5 | -0.7 | — | — | — | — | — | — |
| Local Government | 289.6 | 289.3 | 291.1 | 0.1 | -0.5 | — | — | — | — | — | — |
| Local Government Education | 144.0 | 141.4 | 143.1 | 1.8 | 0.6 | — | — | — | — | — | — |

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, 2013.

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

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

| Industry | Jobs* (Thousands) | | | Percent Change From** | | Production Workers Hours and Earnings: Average Weekly Earnings | | Average Weekly Hours | | Average Hourly Earnings | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Nov 2013 | Oct 2013 | Nov 2012 | Oct 2013 | Nov 2012 | Nov 2013 | Nov 2012 | Nov 2013 | Nov 2012 | Nov 2013 | Nov 2012 |
| **TOTAL NONFARM WAGE AND SALARY** | **1,829.5** | **1,836.1** | **1,796.7** | **-0.4%** | **1.8%** | — | — | — | — | — | — |
| **GOODS-PRODUCING** | **250.9** | **254.4** | **243.6** | **-1.4** | **3.0** | — | — | — | — | — | — |
| **Mining, Logging, and Construction** | **66.9** | **70.7** | **61.8** | **-5.5** | **8.2** | — | — | — | — | — | — |
| Construction of Buildings | 13.2 | 13.6 | 13.0 | -3.0 | 1.9 | — | — | — | — | — | — |
| Specialty Trade Contractors | 45.0 | 47.4 | 42.1 | -5.0 | 7.1 | $1,310.56 | $1,263.89 | 40.3 | 40.2 | $32.52 | $31.44 |
| **Manufacturing** | **184.0** | **183.6** | **181.8** | **0.2** | **1.2** | **837.14** | **810.81** | **40.5** | **40.5** | **20.67** | **20.02** |
| Durable Goods | 126.7 | 126.8 | 125.8 | -0.1 | 0.7 | 864.85 | 829.37 | 41.4 | 40.3 | 20.89 | 20.58 |
| Fabricated Metal Production | 28.4 | 28.5 | 28.2 | -0.2 | 0.9 | — | — | — | — | — | — |
| Machinery Manufacturing | 19.1 | 19.3 | 19.8 | -1.4 | -4.0 | — | — | — | — | — | — |
| Computer and Electronic Product | 35.5 | 35.4 | 35.5 | 0.1 | 0.0 | — | — | — | — | — | — |
| Navigational, Measuring, Electromedical and Control | 23.6 | 23.6 | 23.4 | 0.1 | 1.1 | — | — | — | — | — | — |
| Medical Equipment and Supplies Manufacturing | 14.2 | 14.1 | 14.1 | 0.8 | 0.9 | — | — | — | — | — | — |
| Nondurable Goods | 57.4 | 56.8 | 56.0 | 1.0 | 2.4 | 785.31 | 776.54 | 38.8 | 41 | 20.24 | 18.94 |
| Food Manufacturing | 12.3 | 12.4 | 12.3 | -0.6 | -0.1 | — | — | — | — | — | — |
| Printing and Related | 14.7 | 14.7 | 14.7 | 0.5 | 0.1 | — | — | — | — | — | — |
| **SERVICE-PROVIDING** | **1,578.7** | **1,581.8** | **1,553.1** | **-0.2** | **1.6** | — | — | — | — | — | — |
| **Trade, Transportation, and Utilities** | **325.5** | **322.4** | **323.9** | **1.0** | **0.5** | — | — | — | — | — | — |
| Wholesale Trade | 81.9 | 81.7 | 81.4 | 0.3 | 0.6 | 1,033.81 | 978.76 | 39.9 | 37.4 | 25.91 | 26.17 |
| Merchant Wholesalers - Durable Goods | 43.1 | 42.9 | 43.3 | 0.5 | -0.3 | — | — | — | — | — | — |
| Merchant Wholesalers - Nondurable Goods | 24.2 | 24.3 | 24.3 | -0.4 | -0.3 | — | — | — | — | — | — |
| Retail Trade | 179.7 | 176.8 | 179.7 | 1.6 | 0.0 | 370.16 | 333.96 | 28.3 | 27.9 | 13.08 | 11.97 |
| Food and Beverage Stores | 29.0 | 29.0 | 28.9 | 0.2 | 0.4 | — | — | — | — | — | — |
| General Merchandise Stores | 39.5 | 37.1 | 40.0 | 6.4 | -1.1 | 326.50 | 321.30 | 30.6 | 30.6 | 10.67 | 10.5 |
| Transportation, Warehouse, Utilities | 63.9 | 63.9 | 62.8 | -0.1 | 1.8 | — | — | — | — | — | — |
| Utilities | 7.4 | 7.4 | 7.4 | -0.4 | -0.4 | — | — | — | — | — | — |
| Transportation and Warehousing | 56.5 | 56.5 | 55.4 | 0.0 | 2.0 | 793.43 | 729.06 | 44.4 | 41.9 | 17.87 | 17.4 |
| **Information** | **39.1** | **39.0** | **38.9** | **0.2** | **0.4** | | | | | | |
| Publishing Industries | 16.4 | 16.5 | 16.5 | -0.1 | -0.2 | — | — | — | — | — | — |
| Telecommunications | 9.4 | 9.4 | 9.5 | 0.2 | -0.4 | — | — | — | — | — | — |
| **Financial Activities** | **140.9** | **141.2** | **140.1** | **-0.2** | **0.5** | — | — | — | — | — | — |
| Finance and Insurance | 109.3 | 109.4 | 108.8 | 0.0 | 0.5 | 1,113.33 | 1,036.95 | 37 | 37.1 | 30.09 | 27.95 |
| Credit Intermediation | 37.2 | 37.4 | 37.1 | -0.4 | 0.2 | — | — | — | — | — | — |
| Securities, Commodity Contracts, and Other | 16.0 | 15.9 | 16.1 | 0.7 | -0.3 | — | — | — | — | — | — |
| Insurance Carriers and Related | 53.5 | 53.3 | 52.9 | 0.4 | 1.2 | — | — | — | — | — | — |
| Real Estate and Rental and Leasing | 31.6 | 31.8 | 31.4 | -0.7 | 0.7 | — | — | — | — | — | — |
| **Professional and Business Services** | **281.1** | **282.3** | **277.1** | **-0.5** | **1.4** | — | — | — | — | — | — |
| Professional, Scientific, and Technical Services | 105.8 | 106.7 | 106.2 | -0.9 | -0.3 | — | — | — | — | — | — |
| Legal Services | 16.0 | 16.1 | 15.9 | -0.3 | 1.0 | — | — | — | — | — | — |
| Architectural, Engineering, and Related | 15.5 | 15.6 | 15.1 | -0.7 | 2.6 | — | — | — | — | — | — |
| Computer Systems Design | 26.8 | 27.1 | 26.2 | -1.2 | 2.1 | — | — | — | — | — | — |
| Management of Companies and Enterprises | 69.2 | 68.7 | 67.3 | 0.8 | 2.9 | — | — | — | — | — | — |
| Administrative and Support Services | 106.0 | 107.0 | 103.7 | -0.9 | 2.3 | — | — | — | — | — | — |
| Employment Services | 59.1 | 58.7 | 51.8 | 0.7 | 14.2 | — | — | — | — | — | — |
| **Educational and Health Services** | **305.7** | **305.3** | **294.0** | **0.1** | **4.0** | — | — | — | — | — | — |
| Educational Services | 49.3 | 48.6 | 46.9 | 1.4 | 5.1 | — | — | — | — | — | — |
| Health Care and Social Assistance | 256.4 | 256.8 | 247.2 | -0.1 | 3.7 | — | — | — | — | — | — |
| Ambulatory Health Care | 85.2 | 84.0 | 80.3 | 1.4 | 6.1 | — | — | — | — | — | — |
| Hospitals | 60.1 | 60.5 | 59.9 | -0.7 | 0.2 | — | — | — | — | — | — |
| Nursing and Residential Care Facilities | 56.7 | 57.1 | 55.4 | -0.7 | 2.4 | — | — | — | — | — | — |
| Social Assistance | 54.4 | 55.1 | 51.6 | -1.2 | 5.6 | — | — | — | — | — | — |
| **Leisure and Hospitality** | **163.9** | **170.0** | **157.8** | **-3.6** | **3.8** | — | — | — | — | — | — |
| Arts, Entertainment, and Recreation | 26.0 | 29.4 | 26.6 | -11.5 | -2.1 | — | — | — | — | — | — |
| Accommodation and Food Services | 137.8 | 140.6 | 131.2 | -2.0 | 5.0 | 263.06 | 257.19 | 22.6 | 22.6 | 11.64 | 11.38 |
| Food Services and Drinking Places | 126.5 | 128.5 | 118.8 | -1.6 | 6.4 | 257.3 | 248.18 | 22.2 | 22.1 | 11.59 | 11.23 |
| **Other Services** | **78.4** | **78.0** | **78.2** | **0.5** | **0.2** | — | — | — | — | — | — |
| Repair and Maintenance | 13.6 | 13.5 | 13.5 | 0.3 | 0.6 | — | — | — | — | — | — |
| Religious, Grantmaking, Civic, Professional Organizations | 43.4 | 43.3 | 43.3 | 0.3 | 0.2 | — | — | — | — | — | — |
| **Government** | **244.2** | **243.6** | **243.0** | **0.3** | **0.5** | — | — | — | — | — | — |
| Federal Government | 19.7 | 19.7 | 20.1 | 0.4 | -1.7 | — | — | — | — | — | — |
| State Government | 68.3 | 68.2 | 68.7 | 0.1 | -0.6 | | | | | | |
| State Government Education | 42.7 | 42.6 | 43.5 | 0.2 | -2.0 | | | | | | |
| Local Government | 156.2 | 155.7 | 154.2 | 0.3 | 1.3 | | | | | | |
| Local Government Education | 90.2 | 88.8 | 88.0 | 1.5 | 2.5 | | | | | | |

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, 2010.

# Employer Survey

## Industry

| Industry | Duluth-Superior MSA Jobs Nov 2013 | Duluth-Superior MSA Jobs Oct 2013 | Duluth-Superior MSA Jobs Nov 2012 | Duluth-Superior MSA % Chg. From Oct 2013 | Duluth-Superior MSA % Chg. From Nov 2012 | Rochester MSA Jobs Nov 2013 | Rochester MSA Jobs Oct 2013 | Rochester MSA Jobs Nov 2012 | Rochester MSA % Chg. From Oct 2013 | Rochester MSA % Chg. From Nov 2012 |
|---|---|---|---|---|---|---|---|---|---|---|
| **TOTAL NONFARM WAGE AND SALARY** | **133,573** | **132,994** | **131,997** | **0.4%** | **1.2%** | **107,330** | **107,380** | **106,878** | **0.0%** | **0.4%** |
| **GOODS-PRODUCING** | **15,022** | **15,336** | **15,447** | **-2.0** | **-2.8** | **13,388** | **13,751** | **13,576** | **-2.6** | **-1.4** |
| Mining, Logging, and Construction | 7,752 | 7,994 | 8,097 | -3.0 | -4.3 | 3,411 | 3,542 | 3,377 | -3.7 | 1.0 |
| Manufacturing | 7,270 | 7,342 | 7,350 | -1.0 | -1.1 | 9,977 | 10,209 | 10,199 | -2.3 | -2.2 |
| **SERVICE-PROVIDING** | **118,551** | **117,658** | **116,550** | **0.8** | **1.7** | **93,942** | **93,629** | **93,302** | **0.3** | **0.7** |
| Trade, Transportation, and Utilities | 25,368 | 24,600 | 25,027 | 3.1 | 1.4 | 16,951 | 16,420 | 16,301 | 3.2 | 4.0 |
| Wholesale Trade | 3,224 | 3,221 | 3,204 | 0.1 | 0.6 | 2,330 | 2,319 | 2,340 | 0.5 | -0.4 |
| Retail Trade | 15,791 | 15,176 | 15,655 | 4.1 | 0.9 | 12,062 | 11,591 | 11,527 | 4.1 | 4.6 |
| Transportation, Warehouse, Utilities | 6,353 | 6,203 | 6,168 | 2.4 | 3.0 | 2,559 | 2,510 | 2,434 | 2.0 | 5.1 |
| Information | 1,383 | 1,278 | 1,369 | 8.2 | 1.0 | 1,779 | 1,765 | 1,720 | 0.8 | 3.4 |
| Financial Activities | 5,405 | 5,406 | 5,392 | 0.0 | 0.2 | 2,324 | 2,325 | 2,368 | 0.0 | -1.9 |
| Professional and Business Services | 7,580 | 7,668 | 7,684 | -1.1 | -1.4 | 4,932 | 5,102 | 4,999 | -3.3 | -1.3 |
| Educational and Health Services | 31,169 | 31,006 | 30,518 | 0.5 | 2.1 | 44,485 | 44,463 | 44,279 | 0.0 | 0.5 |
| Leisure and Hospitality | 15,015 | 15,272 | 13,365 | -1.7 | 12.3 | 9,210 | 9,357 | 9,053 | -1.6 | 1.7 |
| Other Services | 5,542 | 5,537 | 5,778 | 0.1 | -4.1 | 3,620 | 3,649 | 3,583 | -0.8 | 1.0 |
| Government | 27,089 | 26,891 | 27,417 | 0.7 | -1.2 | 10,641 | 10,548 | 10,999 | 0.9 | -3.3 |


# Employer Survey

## Industry


| Industry | St. Cloud MSA Jobs Nov 2013 | St. Cloud MSA Jobs Oct 2013 | St. Cloud MSA Jobs Nov 2012 | St. Cloud MSA % Chg. From Oct 2013 | St. Cloud MSA % Chg. From Nov 2012 | Mankato MSA Jobs Nov 2013 | Mankato MSA Jobs Oct 2013 | Mankato MSA Jobs Nov 2012 | Mankato MSA % Chg. From Oct 2013 | Mankato MSA % Chg. From Nov 2012 |
|---|---|---|---|---|---|---|---|---|---|---|
| **TOTAL NONFARM WAGE AND SALARY** | **105,142** | **105,393** | **103,420** | **-0.2%** | **1.7%** | **54,943** | **54,976** | **54,564** | **-0.1%** | **0.7%** |
| **GOODS-PRODUCING** | **20,860** | **21,317** | **20,274** | **-2.1** | **2.9** | **9,796** | **9,866** | **9,781** | **-0.7** | **0.2** |
| Mining, Logging, and Construction | 5,848 | 6,147 | 5,045 | -4.9 | 15.9 | -- | -- | -- | -- | -- |
| Manufacturing | 15,012 | 15,170 | 15,229 | -1.0 | -1.4 | -- | -- | -- | -- | -- |
| | | | | | | -- | -- | -- | -- | -- |
| **SERVICE-PROVIDING** | **84,282** | **84,076** | **83,146** | **0.2** | **1.4** | **45,147** | **45,110** | **44,783** | **0.1** | **0.8** |
| Trade, Transportation, and Utilities | 21,773 | 21,316 | 21,392 | 2.1 | 1.8 | -- | -- | -- | -- | -- |
| Wholesale Trade | 4,316 | 4,337 | 4,201 | -0.5 | 2.7 | -- | -- | -- | -- | -- |
| Retail Trade | 13,781 | 13,323 | 13,660 | 3.4 | 0.9 | -- | -- | -- | -- | -- |
| Transportation, Warehouse, Utilities | 3,676 | 3,656 | 3,531 | 0.5 | 4.1 | -- | -- | -- | -- | -- |
| Information | 1,636 | 1,647 | 1,659 | -0.7 | -1.4 | -- | -- | -- | -- | -- |
| Financial Activities | 4,378 | 4,438 | 4,377 | -1.4 | 0.0 | -- | -- | -- | -- | -- |
| Professional and Business Services | 8,361 | 8,349 | 8,406 | 0.1 | -0.5 | -- | -- | -- | -- | -- |
| Educational and Health Services | 20,064 | 20,301 | 19,208 | -1.2 | 4.5 | -- | -- | -- | -- | -- |
| Leisure and Hospitality | 8,466 | 8,586 | 8,503 | -1.4 | -0.4 | -- | -- | -- | -- | -- |
| Other Services | 3,327 | 3,344 | 3,385 | -0.5 | -1.7 | -- | -- | -- | -- | -- |
| Government | 16,277 | 16,095 | 16,216 | 1.1 | 0.4 | 9,221 | 9,281 | 9,148 | -0.6 | 0.8 |


# Employer Survey

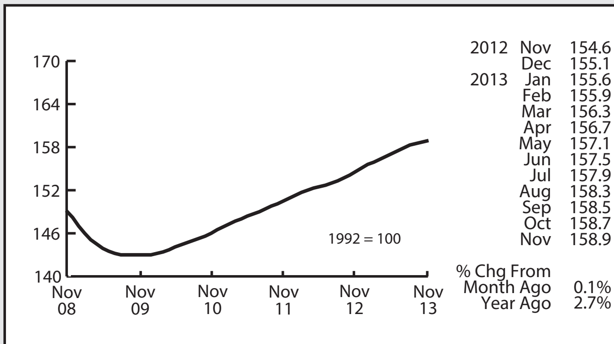
## Industry


| Industry | Fargo-Moorhead MSA Jobs Nov 2013 | Fargo-Moorhead MSA Jobs Oct 2013 | Fargo-Moorhead MSA Jobs Nov 2012 | Fargo-Moorhead MSA % Chg. From Oct 2013 | Fargo-Moorhead MSA % Chg. From Nov 2012 | Grand Forks-East Grand Forks MSA Jobs Nov 2013 | Grand Forks-East Grand Forks MSA Jobs Oct 2013 | Grand Forks-East Grand Forks MSA Jobs Nov 2012 | Grand Forks-East Grand Forks MSA % Chg. From Oct 2013 | Grand Forks-East Grand Forks MSA % Chg. From Nov 2012 |
|---|---|---|---|---|---|---|---|---|---|---|
| **TOTAL NONFARM WAGE AND SALARY** | **135,051** | **135,495** | **132,598** | **-0.3%** | **1.9%** | **58,656** | **58,334** | **57,580** | **0.6%** | **1.9%** |
| **GOODS-PRODUCING** | **20,170** | **20,590** | **18,054** | **-2.0** | **11.7** | **6,995** | **7,254** | **6,889** | **-3.6** | **1.5** |
| Mining, Logging, and Construction | 9,664 | 10,020 | 7,816 | -3.6 | 23.6 | 3,220 | 3,390 | 3,063 | -5.0 | 5.1 |
| Manufacturing | 10,506 | 10,570 | 10,238 | -0.6 | 2.6 | 3,775 | 3,864 | 3,826 | -2.3 | -1.3 |
| **SERVICE-PROVIDING** | **114,881** | **114,905** | **114,544** | **0.0** | **0.3** | **51,661** | **51,080** | **50,691** | **1.1** | **1.9** |
| Trade, Transportation, and Utilities | 30,218 | 29,770 | 29,329 | 1.5 | 3.0 | 13,384 | 12,940 | 12,626 | 3.4 | 6.0 |
| Wholesale Trade | 8,866 | 8,834 | 8,578 | 0.4 | 3.4 | 2,059 | 2,055 | 2,033 | 0.2 | 1.3 |
| Retail Trade | 16,306 | 15,926 | 15,953 | 2.4 | 2.2 | 9,016 | 8,635 | 8,432 | 4.4 | 6.9 |
| Transportation, Warehouse, Utilities | 5,046 | 5,010 | 4,798 | 0.7 | 5.2 | 2,309 | 2,250 | 2,161 | 2.6 | 6.9 |
| Information | 3,272 | 3,280 | 3,225 | -0.2 | 1.5 | 603 | 600 | 603 | 0.5 | 0.0 |
| Financial Activities | 9,317 | 9,314 | 9,171 | 0.0 | 1.6 | 1,660 | 1,660 | 1,657 | 0.0 | 0.2 |
| Professional and Business Services | 15,526 | 15,771 | 15,576 | -1.6 | -0.3 | 2,937 | 2,957 | 2,870 | -0.7 | 2.3 |
| Educational and Health Services | 21,485 | 21,356 | 20,799 | 0.6 | 3.3 | 9,859 | 9,875 | 9,628 | -0.2 | 2.4 |
| Leisure and Hospitality | 12,284 | 12,800 | 13,827 | -4.0 | -11.2 | 6,313 | 6,267 | 6,426 | 0.7 | -1.8 |
| Other Services | 5,152 | 5,131 | 5,102 | 0.4 | 1.0 | 1,955 | 1,969 | 1,951 | -0.7 | 0.2 |
| Government | 17,627 | 17,483 | 17,515 | 0.8 | 0.6 | 14,950 | 14,812 | 14,930 | 0.9 | 0.1 |

Source: Department of Employment and Economic Development, Current Employment Statistics, and North Dakota Job Service, 2013.

# Minnesota Economic Indicators

## Highlights



Source: The Federal Reserve Bank of Philadelphia, 2013

### Minnesota Index

The **Minnesota Index** advanced for the 48th straight month in November, but the pace of growth has slowed during the last few months. November's 0.1 percent increase was significantly below the 0.3 percent average monthly increase achieved during the first six months of the year. The U.S. index jumped 0.3 percent in November as the national economy picked up speed during the last few months. The U.S. index averaged 0.2 percent during the first half of the year but will average 0.3 percent over the last six months of the year. After outpacing the U.S. Index over the first half of the year, Minnesota's index has lagged behind the U.S. index's pace over the last half of the year.

Minnesota's index in November was 2.7 percent higher than a year ago, while the U.S. index was 3.0 percent higher than 12 months ago. The 2.7 percent increase was the lowest over-the-year increase since last November. The slowdown in the Minnesota index may be revised away when employment data are revised early next year, but for now the index is pointing toward a slight slowdown in Minnesota's economy as the year ends.

Minnesota's adjusted **Wage and Salary Employment** slipped slightly in November with 800 jobs lost. Private sector employment was up 2,400, but Government employment declined 3,200. Minnesota's Private sector added 22,400 jobs during the first half of 2013 but only 13,400 jobs over the last five months. Information added the most workers last month, hiring 1,300 employees. Employment in Financial Activities and Other Services also added more than 1,000 jobs. The decline in Government jobs was concentrated in Local Government employment. Professional and Business Services employment also declined significantly in November.

Over-the-year job growth in Minnesota using unadjusted employment tailed off to 1.4 percent in November compared to 1.7 percent nationally. Minnesota's annual average job growth rate is likely to be 1.8 percent for 2013 which translates into 49,000 new jobs, up from 39,000 in 2012 and 47,000 in 2011. The state added an average of 54,000 jobs annually between 1990 and 2000.

After plunging 6.9 percent in October, Minnesota's adjusted online **Help-Wanted Ads** surged 8.4 percent in November. November's 124,000 ads rank as the fifth highest monthly volume since the Conference Board starting counting online help-wanted ads in 1995. Help-wanted advertising, after running below last year's level since March, jumped to 1.6 percent higher than a year ago in November. Labor demand as measured by online help-wanted ads remains solid suggesting that job growth is unlikely to slow up during the first half of 2014.

Minnesota's **Purchasing Managers' Index (PMI)** rebounded slightly in November inching up to 55.7. A reading above 50 indicates economic growth over the next few months, so November's reading implies Minnesota's economy will continue to grow through the first quarter of 2014. The employment component of the PMI was above 50 for the 13th consecutive month suggesting that manufacturers will be adding workers over the near future.

Adjusted **Manufacturing Hours** dipped a tad to 41.5 hours in November but remain near historical highs. The average factory workweek has been 41.5 hours or longer only 10 percent of the time since 1970. The relatively long workweek suggests that the recent uptick in manufacturing hiring will spill over into 2014. **Manufacturing Earnings** rose sharply for the second month in a row, soaring to $835.58 in November. That is the second highest average weekly paycheck earned over the last 43 years by Minnesota manufacturing workers. The $835.58 weekly paycheck works out to $43,450 per year.

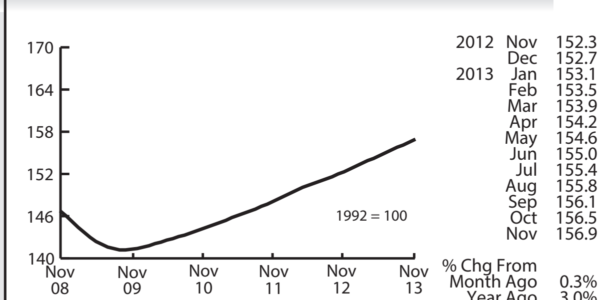
The **Minnesota Leading Index** stumbled for the fourth time in the past five months in November. The index, after averaging 1.6 percent during the first half of the year, has averaged 0.9 percent over the last five months. The drop implies that Minnesota's economic growth will be slowing significantly over the next six months. This is the only indicator that is flashing red about Minnesota's economy during the first half of 2014.

Adjusted **Residential Building Permits** reversed a two-month skid jumping 13.5 percent. Minnesota's home-building rebound continues to be uneven, but the overall trend is a gradual upswing.

Adjusted **Initial Claims for Unemployment Benefits (UB)**, after inching up over the previous three months, headed in the right direction in November, declining 2.4 percent. The low volume of initial claims is another positive indicator that Minnesota's job growth will remain solid right through the first half of 2014.

*by Dave Senf*

### United States Index

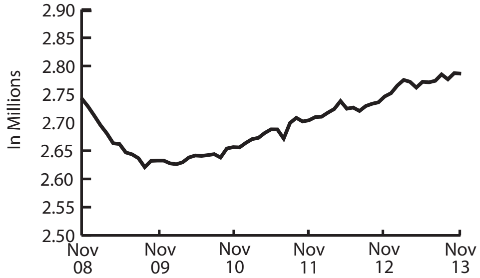


Source: The Federal Reserve Bank of Philadelphia, 2013.

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

# Minnesota Economic Indicators

## Wage and Salary Employment




seasonally adjusted

| | | |
|---|---|---|
| 2013 | Jun | 2.7711 |
| | Jul | 2.7738 |
| | Aug | 2.7851 |
| | Sep | 2.7764 |
| | Oct | 2.7873 |
| | Nov | 2.7865 |

% Chg From Month Ago 0.0%

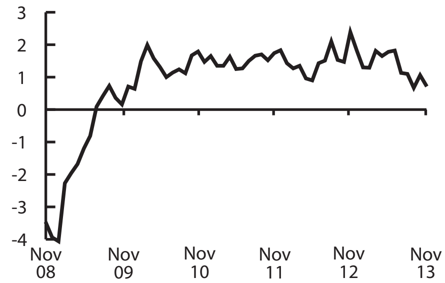
unadjusted

| | | |
|---|---|---|
| 2012 | Nov | 2.7664 |
| 2013 | Nov | 2.8062 |

% Chg From Year Ago 1.4%

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2013.

## Minnesota Leading Index

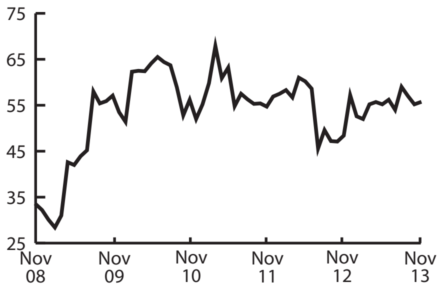



| | | |
|---|---|---|
| 2012 | Nov | 2.39 |
| | Dec | 1.83 |
| 2013 | Jan | 1.30 |
| | Feb | 1.29 |
| | Mar | 1.81 |
| | Apr | 1.65 |
| | May | 1.78 |
| | Jun | 1.82 |
| | Jul | 1.13 |
| | Aug | 1.10 |
| | Sep | 0.67 |
| | Oct | 1.06 |
| | Nov | 0.73 |

% Chg From Month Ago -31.5%
Year Ago -69.5%

Source: The Federal Reserve Bank of Philadelphia, 2013

## Purchasing Managers' Index

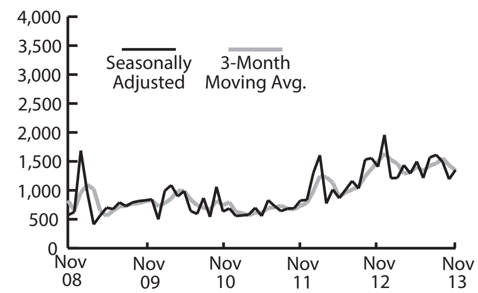



| | | |
|---|---|---|
| 2012 | Nov | 48.4 |
| | Dec | 57.2 |
| 2013 | Jan | 52.6 |
| | Feb | 52.0 |
| | Mar | 55.2 |
| | Apr | 55.7 |
| | May | 55.2 |
| | Jun | 56.2 |
| | Jul | 54.0 |
| | Aug | 59.0 |
| | Sep | 57.0 |
| | Oct | 55.2 |
| | Nov | 55.7 |

% Chg From Month Ago 0.9%
Year Ago 15.1%

Source: Creighton University, Mid-America Survey of Business Conditions, 2013.

## Residential Building Permits




seasonally adjusted

| | | |
|---|---|---|
| 2013 | Jun | 1,213 |
| | Jul | 1,566 |
| | Aug | 1,613 |
| | Sep | 1,490 |
| | Oct | 1,192 |
| | Nov | 1,352 |

% Chg From Month Ago 13.5%

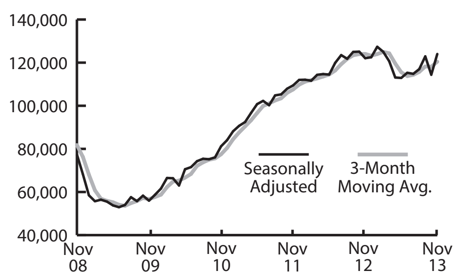
unadjusted

| | | |
|---|---|---|
| 2012 | Nov | 1,313 |
| 2013 | Nov | 1,260 |

% Chg From Year Ago -4.0%

Source: Residential Building Permits, Census Bureau, U.S. Department of Commerce, 2013.

## Average Weekly Manufacturing Hours




seasonally adjusted

| | | |
|---|---|---|
| 2013 | Jun | 41.4 |
| | Jul | 41.6 |
| | Aug | 41.2 |
| | Sep | 41.3 |
| | Oct | 41.6 |
| | Nov | 41.5 |

% Chg From Month Ago -0.3%

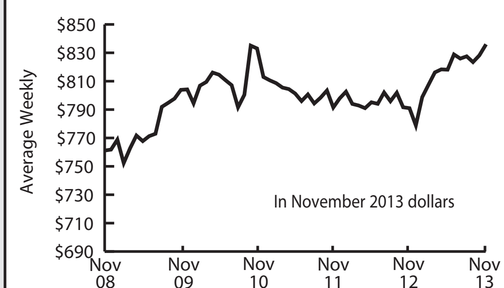
unadjusted

| | | |
|---|---|---|
| 2012 | Nov | 40.8 |
| 2013 | Nov | 41.6 |

% Chg From Year Ago 2.0%

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2013.

## Manufacturing Earnings




seasonally adjusted

| | | |
|---|---|---|
| 2013 | Jun | 828.85 |
| | Jul | 825.94 |
| | Aug | 827.52 |
| | Sep | 823.46 |
| | Oct | 828.17 |
| | Nov | 835.58 |

% Chg From Month Ago 0.9%

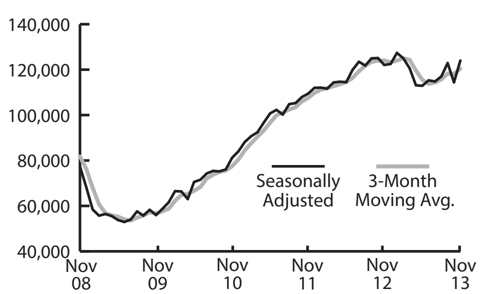
unadjusted

| | | |
|---|---|---|
| 2012 | Nov | 788.92 |
| 2013 | Nov | 832.83 |

% Chg From Year Ago 5.6%

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2013.

## Online Help-Wanted Advertising

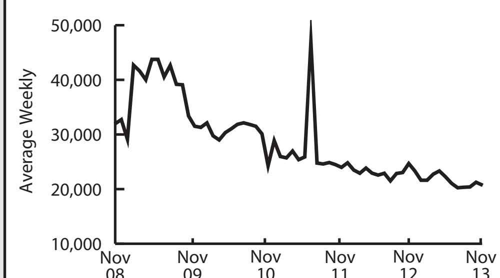



| | | |
|---|---|---|
| 2012 | Nov | 122,066 |
| | Dec | 122,500 |
| 2013 | Jan | 127,366 |
| | Feb | 125,028 |
| | Mar | 120,633 |
| | Apr | 113,100 |
| | May | 112,900 |
| | Jun | 115,300 |
| | Jul | 114,800 |
| | Aug | 117,000 |
| | Sep | 122,900 |
| | Oct | 114,400 |
| | Nov | 124,000 |

% Chg From Month Ago 8.4%
Year Ago 1.6%

Source: The Conference Board Inc., 2013.

## Initial UB Claimants




seasonally adjusted

| | | |
|---|---|---|
| 2013 | Jun | 21,054 |
| | Jul | 20,242 |
| | Aug | 20,338 |
| | Sep | 20,388 |
| | Oct | 21,252 |
| | Nov | 20,750 |

% Chg From Month Ago -2.4%

unadjusted

| | | |
|---|---|---|
| 2012 | Nov | 34,056 |
| 2013 | Nov | 27,925 |

% Chg From Year Ago -18.0%

Source: Department of Employment and Economic Development, Unemployment Insurance Program, 2013.

Minnesota Employment Review

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Internet :
http://mn.gov/deed/lmi

**Labor Market Information Help Line:**
651.259.7384



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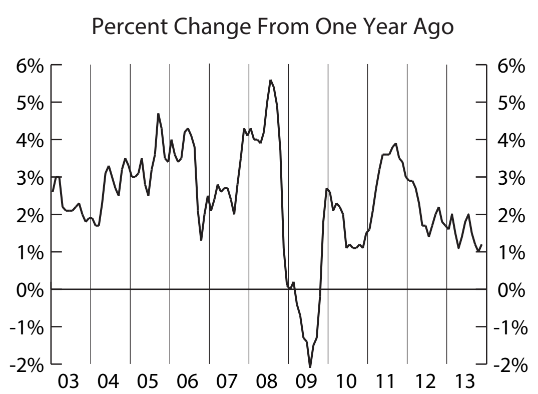
## U.S. Consumer Price Index for All Urban Consumers (CPI-U)




The CPI-U was unchanged in November on a seasonally adjusted basis. The energy index declined in November, offsetting increases in other indexes. Indexes for gasoline and for natural gas fell significantly, more than offsetting increases in the electricity and fuel oil indexes. The food index rose slightly in November; the food at home index was unchanged. Over the past year, the all items index increased 1.2 percent. The 12-month increase in the index for all items less food and energy remained at 1.7 percent for the third month in a row. The food index increased 1.2 percent over the last 12 months; the energy index declined 2.4 percent.

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.

The employment and unemployment data in this publication were produced in cooperation with the Bureau of Labor Statistics, U.S. Department of Labor.




## What's Going On?

### New Angel Loan Fund will help startup businesses grow

Minnesota entrepreneurs can apply for no-interest loans of up to $250,000 — to help with business startup costs, working capital, equipment purchases, construction, inventory financing, franchise funding and more — from a new $6.7 million Angel Loan Fund.

The Angel Loan Fund is one of four programs available to help small businesses under DEED's State Small Business Credit Initiative. The programs are expected to spur at least $150 million in lending to small businesses statewide and help create an additional 3,000 new jobs. The Angel Loan Fund is a supplement to the Angel Tax Credit, which has delivered more than $137 million to help hundreds of startup companies.

For additional information, visit the DEED website at **www.tinyurl.com/AngelLoanFund** or contact Lisa Dargis at 651-259-7446 or 1-800-657-3858

Minnesota
Department of Employment and Economic Development

# A New Minimum?

The Minnesota Legislature debated raising the state minimum wage in the 2013 legislative session. Because wage level differences in House and Senate bills remained unresolved as the session closed, the Legislature is expected to revisit the issue when the session resumes in February 2014. This raises the question: How many jobs, in which regions, and in which occupations, would be affected if there were a substantial increase in the state minimum wage? To find the answer, we take the higher minimum wage level of the House bill (HF0092), $9.50 an hour for large employers, and estimate how many jobs would see wages increase to meet the new level.

## Understanding Minnesota's Current Minimum Wage

Minnesota's minimum wage currently stands at $6.15 an hour for large employers, defined as those with gross annual revenue of $625,000 or more, which is below the federal minimum wage of $7.25 an hour. According to federal law, any employer, for-profit or nonprofit, with annual gross revenue of $500,000 or more that engages in interstate commerce — by taking credit cards or using out-of-state suppliers, for example — must pay the federal minimum wage whenever it is higher than the state minimum as is the case today. The higher wage also prevails for any employee who engages in interstate commerce in a given week in the performance of their job, regardless of the amount of the employer's annual gross revenue.

Thus, $7.25 an hour is the minimum wage the vast majority of Minnesota employers must pay. So few businesses fall outside of the federal coverage that the Minnesota Department of Labor and Industry, which administers minimum wage laws, describes $7.25 as the effective minimum wage in Minnesota. For the purpose of our analysis here, we do not include jobs that pay below $7.25 an hour in the count of jobs which would be affected by the proposed $9.50 an hour minimum wage.

If the federal minimum wage had kept pace with inflation since 1968, it would today be $10.75 an hour according to the Bureau of Labor Statistics' CPI Inflation Calculator. The difference between the hypothetical inflation-adjusted federal wage of $10.75 an hour and the actual effective wage of $7.25 demonstrates a loss of consumer purchasing power, making it harder for people with jobs to make ends meet.

Several states have set their minimum wages well above the federal rate. California will raise its minimum wage to $10.00 an hour in 2016, while the state of Washington raised its minimum wage to $9.19 an hour and pegged it to rise with inflation. Oregon's wage of $8.95 an hour, also pegged to inflation, will easily surpass $9.00 an hour by 2015, and Connecticut's wage will be $9.00 an hour in 2015.

## Regional Impacts on Increasing the Minimum Wage

A special analysis of Occupational Employment Statistics (OES) program data provides insight into the estimated number of jobs in Minnesota, by region and by occupation, that pay under $9.50 an hour and therefore would be affected by the increase. Wages reported by employers to the OES program should include straight-time gross pay, which includes incentive pay, both commissions and production bonuses, and tips.[1] Further, employment estimates include non-farm,

Minnesota
Department of Employment and Economic Development

full- or part-time paid workers, paid owners, officers, and staff of incorporated firms covered by the state's Unemployment Insurance (UI) program.[2]

Overall, 387,710 jobs in Minnesota, or 14.7 percent of total occupational employment, paid under $9.50 an hour during first quarter 2013 based on the OES employment and wage estimates. This percentage varies by region as seen in Figure 1. The Twin Cities Metro (12.5 percent) and Southeast (16.3 percent) regions had the lowest percentage of jobs paying less than $9.50 an hour, while Northeast (19.8 percent) and Southwest (19.7 percent) had the highest percentage of jobs that would be impacted by an increase in the minimum wage.

Our OES analysis is a count of jobs, not people. In some cases one person may hold multiple jobs. Wage records collected by the UI program could also be used to analyze the percent of jobs paying under $9.50 by region, firm size, and industry and may yield different results than are presented here. The December 2013 edition of Minnesota Economic Trends includes such an article.

## Wage Raise by Occupation

One advantage to using OES to estimate jobs that could be impacted by a minimum wage increase is the ability to look at the data at an occupation level. Regional occupational distributions can also account for the differences in the percentages of jobs paying less than $9.50 an hour. Table 1 shows the estimated number and percent of jobs with a wage of less than $9.50 by occupational grouping. Food preparation and serving related occupations accounted for the largest number of jobs with a wage under $9.50, with almost 60 percent of these jobs in the Twin Cities Metro and just over 70 percent of jobs in Northeast Minnesota paying less than this amount. Depending on the region 25 to 33 percent of jobs in sales and related occupations also pay less than $9.50. In addition to these groupings, other service-providing jobs like building and maintenance and personal care and service would be most affected by an increase in the minimum wage to $9.50. On the other hand, an increase in the minimum wage to $9.50 would impact a small number of jobs in several occupational groups, including architectural and engineering, computer and mathematical, and legal.

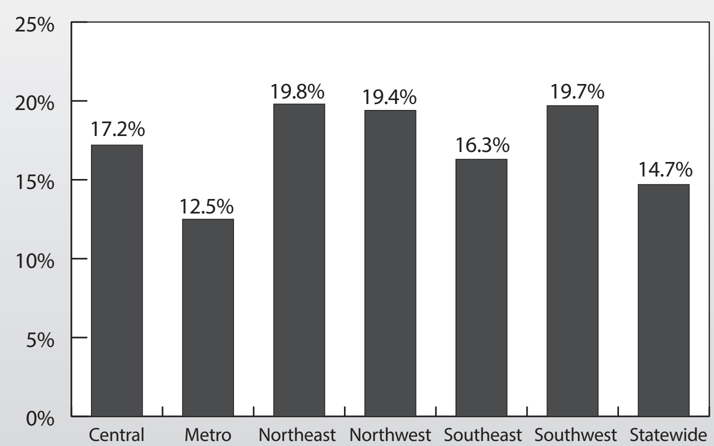
Following are the 10 occupations with the largest percentage of jobs paying under $9.50 an hour in Minnesota. Many are in the food service industry:

- Combined food preparation and service workers, including fast food, 82.5 percent
- Dining room, cafeteria attendants, and bartender helpers, 82.1 percent
- Hosts and hostesses, 81.9 percent
- Waiters and waitresses, 76.6 percent
- Counter attendants, 76.5 percent
- Cooks, fast food, 74.7 percent
- Baggage porters, and bellhops, 73.6 percent
- Dishwashers, 73.2 percent
- Bartenders, 72.4 percent
- Amusement and recreation attendants, 70.3 percent

Several of these occupations — waiters and waitresses, baggage porters and bartenders — usually receive tips. Employers participating in the OES program are asked to include tips in their hourly wage calculations. Currently Minnesota employers cannot take a tip credit against state- or federal-set minimum wages, meaning that employees must be paid the minimum wage as a reliable base rate independent of the variability of tips.

Figure 1

**Estimated Percent of Jobs Paying Less than $9.50 in Minnesota by Region**




Source: DEED, Occupational Employment Statistics (OES)

## Table 1: Estimated Number of Jobs Paying Under $9.50 in Minnesota by Occupational Group and Region

| Occupation Code | Occupation Title | Minnesota | | Central | | Metro | | Northeast | | Northwest | | Southeast | | Southwest | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Number Paying <$9.50 | Percent Paying <$9.50 | Number Paying <$9.50 | Percent Paying <$9.50 | Number Paying <$9.50 | Percent Paying <$9.50 | Number Paying <$9.50 | Percent Paying <$9.50 | Number Paying <$9.50 | Percent Paying <$9.50 | Number Paying <$9.50 | Percent Paying <$9.50 | Number Paying <$9.50 | Percent Paying <$9.50 |
| 11-0000 | Management | 961 | 0.6% | 141 | 1.3% | 318 | 0.3% | 90 | 1.4% | 146 | 1.6% | 128 | 1.2% | 136 | 1.8% |
| 13-0000 | Business and Financial Operations | 1,185 | 0.8% | 120 | 1.6% | 397 | 0.4% | 81 | 1.8% | 107 | 1.7% | 141 | 1.8% | 337 | 6.2% |
| 15-0000 | Computer and Mathematical | 213 | 0.3% | 67 | 2.6% | 92 | 0.1% | 12 | 0.6% | 19 | 1.0% | 20 | 0.3% | <5 | <1.0% |
| 17-0000 | Architecture and Engineering | 16 | 0.0% | <5 | <1.0% | 6 | 0.0% | <5 | <1.0% | <5 | <1.0% | <5 | <1.0% | 0 | 0.0% |
| 19-0000 | Life, Physical, and Social Science | 149 | 0.6% | <5 | <1.0% | 38 | 0.2% | 0 | 0.0% | <5 | <1.0% | 81 | 3.9% | 22 | 1.6% |
| 21-0000 | Community and Social Services | 1,596 | 3.2% | 186 | 3.3% | 398 | 1.4% | 370 | 7.6% | 303 | 6.8% | 184 | 4.7% | 152 | 4.5% |
| 23-0000 | Legal | 51 | 0.3% | 0 | 0.0% | <5 | <1.0% | 7 | 1.4% | 40 | 5.1% | <5 | <1.0% | 0 | 0.0% |
| 25-0000 | Education, Training, and Library | 10,223 | 6.7% | 506 | 2.7% | 6,230 | 7.3% | 368 | 4.4% | 744 | 4.8% | 1,556 | 11.2% | 813 | 7.5% |
| 27-0000 | Arts, Design, Entertainment, and Media | 4,054 | 10.6% | 281 | 16.3% | 2,365 | 8.1% | 199 | 14.5% | 214 | 11.2% | 679 | 25.0% | 260 | 18.6% |
| 29-0000 | Healthcare Practitioners and Technical | 1,027 | 0.7% | 95 | 0.6% | 317 | 0.4% | 161 | 1.5% | 78 | 0.6% | 203 | 0.9% | 169 | 1.8% |
| 31-0000 | Healthcare Support | 7,582 | 8.1% | 1,285 | 10.7% | 1,818 | 4.0% | 1,062 | 15.2% | 1,099 | 11.8% | 871 | 8.2% | 1,416 | 15.6% |
| 33-0000 | Protective Service | 3,406 | 8.1% | 304 | 7.7% | 1,395 | 5.5% | 346 | 10.9% | 713 | 20.0% | 296 | 8.6% | 342 | 14.7% |
| 35-0000 | Food Preparation and Serving Related | 140,545 | 62.9% | 14,372 | 66.5% | 77,984 | 59.6% | 10,316 | 70.4% | 13,819 | 66.6% | 12,011 | 65.9% | 11,898 | 69.8% |
| 37-0000 | Building , Grounds Cleaning and Maintenance | 22,240 | 27.5% | 2,486 | 28.9% | 10,397 | 24.0% | 2,041 | 36.7% | 2,747 | 31.8% | 2,400 | 28.5% | 1,822 | 35.1% |
| 39-0000 | Personal Care and Service | 28,059 | 26.7% | 3,974 | 35.2% | 13,907 | 21.4% | 2,289 | 37.1% | 3,689 | 43.8% | 1,937 | 28.7% | 2,225 | 30.4% |
| 41-0000 | Sales and Related | 83,582 | 30.8% | 9,579 | 37.9% | 45,000 | 25.8% | 5,553 | 42.8% | 8,000 | 39.1% | 8,358 | 40.2% | 6,928 | 42.4% |
| 43-0000 | Office and Administrative Support | 35,602 | 8.9% | 4,340 | 12.3% | 16,659 | 6.4% | 2,651 | 13.6% | 4,402 | 15.3% | 3,833 | 12.2% | 3,591 | 15.4% |
| 45-0000 | Farming, Fishing, and Forestry | 674 | 20.9% | 148 | 30.5% | 145 | 26.4% | 5 | 2.0% | 175 | 27.3% | 79 | 17.4% | 123 | 14.9% |
| 47-0000 | Construction and Extraction | 1,211 | 1.5% | 139 | 1.2% | 595 | 1.5% | 93 | 1.5% | 191 | 2.2% | 56 | 0.8% | 63 | 1.0% |
| 49-0000 | Installation, Maintenance, and Repair | 3,094 | 3.5% | 389 | 4.1% | 1,528 | 3.2% | 166 | 2.5% | 268 | 3.2% | 340 | 3.9% | 399 | 5.4% |
| 51-0000 | Production | 19,099 | 8.9% | 2,027 | 7.5% | 12,253 | 10.6% | 758 | 9.9% | 1,256 | 6.6% | 1,167 | 5.1% | 1,549 | 7.2% |
| 53-0000 | Transportation and Material Moving | 25,188 | 15.6% | 3,306 | 18.1% | 12,828 | 14.4% | 1,389 | 17.6% | 2,501 | 17.6% | 2,955 | 19.3% | 2,095 | 16.1% |
| **00-0000** | **Total, All Occupations** | **387,711** | **14.7%** | **43,565** | **17.2%** | **203,692** | **12.5%** | **27,775** | **19.8%** | **40,267** | **19.4%** | **37,127** | **16.3%** | **34,089** | **19.7%** |

Source: DEED, Occupational Employment Statistics (OES)

## Wage Raise for Job Vacancies

In addition to the wages of currently employed workers, the wages for open positions will also be impacted if the state's minimum wage increases to $9.50 an hour. Another method of assessing the impact of an increase in the minimum wage is to look at the wages of current job openings across Minnesota, as captured by the semi-annual Job Vacancy Survey (JVS). Table 2 shows the high-end percentage of job openings during second quarter 2013 that had a median wage of $9.50 or less by region.[3] A distinction is made between full-time and part-time openings since full-time positions are more likely to offer wages above $9.50 an hour. Just 6.4 percent of full-time job vacancies offered a median wage of less than $9.50 compared to 61.6 percent of part-time openings in Minnesota. Forty-five percent of all job vacancies in Minnesota are part-time.

The concentration varies by region as the Northwest region had a substantially higher percentage of full-time job openings offering less than $9.50. This situation likely correlates to the region's higher concentration of temporary or seasonal job vacancies during second quarter 2013.[4]

## Conclusion

The exact number of jobs that would be affected by a proposed $9.50 an hour minimum wage might not be known, but the increase could be expected to have varying impacts across regions and occupations, as suggested by these estimates. Some median wage offers captured by the JVS also would rise, particularly among the 45 percent of Minnesota job openings that are part-time. Part-time job seekers, particularly in food service and sales occupations, will see an increase in their hourly wage offers.

Additional analysis would be required to estimate the effect of the proposed minimum wage increase on consumer spending power in Minnesota, the effect on individuals and families who depend either fully or partly on minimum wage incomes, and the channels of adjustment employers would likely use to absorb the increased wage bill. Understanding the number and share of affected jobs and job openings is an important first step toward helping communities and their representatives make informed choices in the coming legislative session.

by John Clay and Rachel Vilsack

Labor Market Information Office
Minnesota Department of Employment and Economic Development

### Table 2: Percentage of Job Openings Paying $9.50 or Less, 2Q 2013

| Region | Full-Time Openings | Part-Time Openings |
|---|---|---|
| Central | 3.5% | 59.0 |
| Northeast | 10.9% | 79.2 |
| Northwest | 48.0% | 78.5 |
| Metro | 4.9% | 69.0 |
| Southeast | 6.8% | 58.8 |
| Southwest | 10.9% | 87.1 |
| **Statewide** | **6.4**% | **61.6** |

Source: DEED, Job Vacancy Survey

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[1] Excluded from the wage definition are overtime pay, shift differentials, non-production bonuses, holiday pay, meal and lodging payments, draw, severance pay, back pay, jury duty pay, and tuition reimbursements.

[2] Excluded from the employment definition are proprietors of unincorporated firms, other self-employed and contract workers, unpaid family workers, and workers on unpaid leave.

[3] The percentages displayed in this analysis include occupations for which data were disclosable and where the median wage was $9.50 or less.

[4] Economic Development Regions (EDR) 4 and 5 in Northwest Minnesota have a higher than average percentage of full-time job openings also classified as temporary or seasonal. These jobs overwhelmingly appear in the building, grounds cleaning and maintenance, and transportation and material moving occupations.