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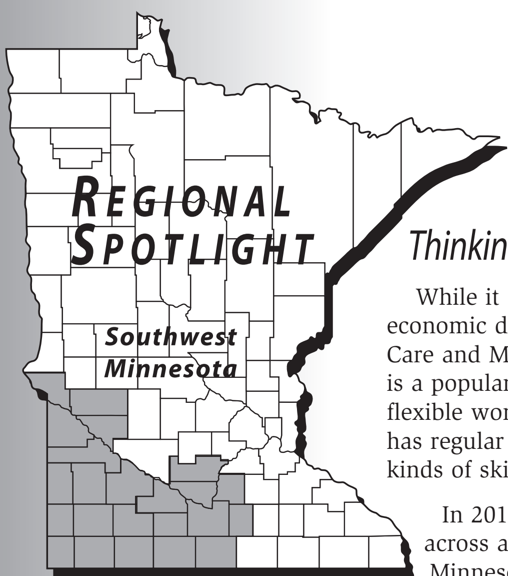

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Grand Openings

The Impact of Retail in Southwest Minnesota

Thinking Outside the Big Box

While it doesn't enjoy the same workforce and economic development focus that the larger Health Care and Manufacturing industries do, Retail Trade is a popular employment option because it offers flexible work conditions, a variety of challenges, has regular vacancies, and accommodates many kinds of skills.

In 2012 there were 173,371 covered jobs across all industries in the 23-county Southwest Minnesota planning region according to data from DEED's Quarterly Census of Employment & Wages program. Of those, 20,095 jobs were in Retail Trade, making it the third largest employing industry in the region, behind Health Care and Manufacturing. Retail Trade provides about 11.6 percent of total employment in Southwest Minnesota, which was 1.0 percent more concentrated than in the state of Minnesota as a whole (see Table 1).

The largest number and highest concentration of retail jobs and total jobs in the planning region are in South Central Minnesota (Region 9), which encompasses Blue Earth, Brown, Faribault, Le Sueur, Martin, Nicollet, Sibley, Waseca, and Watonwan counties, as well as the Mankato-North Mankato metropolitan area. In 2012 Region 9 had 893 Retail Trade establishments providing 12,226 jobs and accounting for 12 percent of total jobs.

Retailers in Southwest Minnesota (Region 8), which includes Cottonwood, Jackson, Lincoln, Lyon, Murray, Nobles, Pipestone, Redwood, and Rock counties, offered 6,063 jobs at 545 establishments in 2012 or 11.3 percent of total jobs.

Table 1: Industry Employment Statistics, 2012 Annual Data

Region	Industry Title	Number of Firms	Number of Jobs	Total Payroll	Average Annual Wages
Southwest Minnesota Planning Region	Total, All Industries	12,268	173,371	$6,061,511,826	$34,963
	Retail Trade	1,644	20,095	$412,616,472	$20,533
Region 6W – Upper MN Valley	*Total, All Industries*	*1,605*	*17,929*	*$589,705,642*	*$32,891*
	Retail Trade	*207*	*1,807*	*$33,361,938*	*$18,463*
Region 8 – Southwest	*Total, All Industries*	*4,040*	*53,677*	*$1,789,507,898*	*$33,338*
	Retail Trade	*545*	*6,063*	*$124,585,987*	*$20,549*
Region 9 – South Central	*Total, All Industries*	*6,624*	*101,765*	*$3,682,298,286*	*$36,184*
	Retail Trade	*893*	*12,226*	*$254,668,547*	*$20,830*
State of Minnesota	Total, All Industries	167,213	2,644,930	$130,515,059,105	$49,345
	Retail Trade	19,212	283,243	$7,178,127,835	$25,343

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

Regional Spotlight Southwest Minnesota

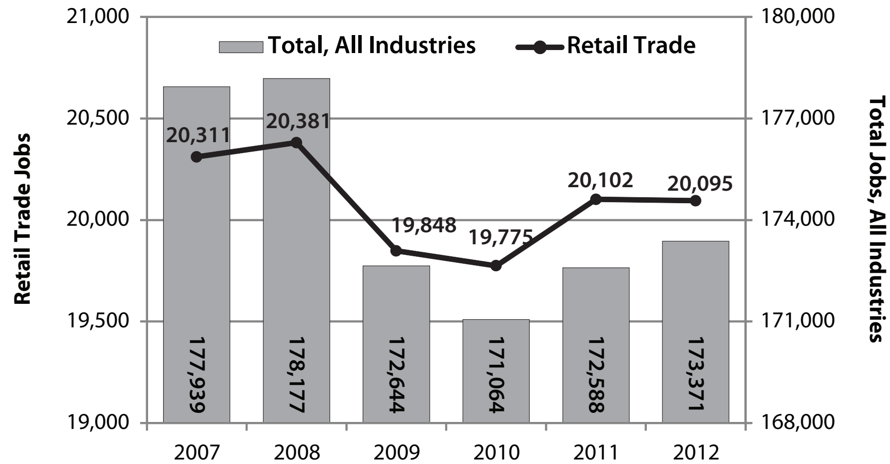
The Upper Minnesota Valley (Region 6W) had the smallest concentration and count of Retail Trade employment with 1,807 jobs at 207 establishments, but it still supplied at least one in every 10 jobs in the five-county — Big Stone, Chippewa, Lac qui Parle, Swift, and Yellow Medicine — region.

Keeping Jobs in Stock

With its large number and consistent availability of jobs, Retail Trade's impact on the workforce of Southwest Minnesota cannot be overstated. In addition to current demand, employment in Retail remained relatively stable over the past five years, despite the recession. While industries like Manufacturing, Construction, and Administrative Support and Waste Management Services declined around 10 percent from 2008 to 2009, Retail Trade cut just 2.6 percent of jobs. Although retail sales were affected by swooning consumer confidence, employment did not appear to drop as drastically.

This vital sector has also rebounded at a greater rate than employment across all industries. There are now three full years of recovery-level employment data through 2012, with Retail Trade regaining 98.9 percent of its pre-recession mark in employment. In comparison, the Southwest Minnesota planning region economy is at 97.4 percent of its pre-recession employment level. Jobs in Retail Trade have grown 1.6 percent from 2010 to 2012 compared to a 1.3 percent increase in the total of all industries (see Figure 1).

Figure 1: Southwest Minnesota Employment Statistics, 2007-2012



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

'Tis the Season

DEED's most recent Job Vacancy Survey results provide another sign of Retail's recovery in Southwest Minnesota. Retail job vacancies in the second quarter of 2013 were the highest reported since the second quarter of 2004, and were the third highest count since the recession started in 2007. However, Retail Trade has a strong seasonal component, meaning that the fourth quarter job vacancy survey is often a better indicator of retail hiring patterns.

Vacancies are almost always higher during the fourth quarter, as many retail establishments add temporary help to accommodate an increase in business during the holiday rush, typically from October through December, relying on a flexible workforce that often works variable part-time hours for low wages. In the remaining months these retailers are staffed by more permanent, but often still part-time, workers with slightly higher wages.

During the recession Retail's dependence on part-time employment increased, seasonal employment decreased, fourth quarter vacancies

Table 2: Southwest Minnesota Planning Region Job Vacancy Survey Results, 2007-2013

		Q2 2007	Q4 2007	Q2 2008	Q4 2008	Q2 2009	Q4 2009	Q2 2010	Q4 2010	Q2 2011	Q4 2011	Q2 2012	Q4 2012	Q2 2013
Total, All Industries	**Total Vacancies**	**4,104**	**4,556**	**3,232**	**2,998**	**2,087**	**2,265**	**2,791**	**3,120**	**4,260**	**3,506**	**4,345**	**3,638**	**4,734**
	Percent Part-Time	36%	53%	37%	35%	46%	50%	48%	46%	41%	45%	39%	43%	39%
	Percent Seasonal	17%	27%	14%	8%	30%	8%	21%	11%	24%	14%	24%	13%	22%
	Median Wage Offer	$9.14	$10.00	$9.73	$11.00	$10.00	$10.00	$10.00	$9.54	$11.45	$10.84	$11.78	$11.40	$11.00
	Offers Health Care	58%	53%	71%	59%	48%	58%	46%	57%	39%	55%	48%	57%	53%
Retail Trade	**Total Vacancies**	**181**	**673**	**185**	**249**	**109**	**105**	**498**	**810**	**238**	**441**	**305**	**376**	**659**
	Percent Part-Time	68%	80%	81%	83%	82%	57%	76%	71%	77%	76%	77%	52%	76%
	Percent Seasonal	2%	48%	0%	19%	2%	45%	5%	11%	30%	37%	7%	30%	20%
	Median Wage Offer	$7.00	$8.00	$8.00	$7.50	$8.00	$7.25	$7.96	$7.94	$7.96	$7.92	$9.13	$9.16	$8.97
	Offers Health Care	98%	44%	47%	13%	18%	74%	37%	41%	32%	27%	53%	65%	28%

Source: DEED Job Vacancy Survey

dropped significantly, and wage offers hovered around minimum wage. When the recovery started in 2010, hiring activity returned to normal. From the second quarter of 2009 to the second quarter of 2010, retail job vacancies increased by 450 percent, while fourth quarter 2009 to fourth quarter 2010 vacancies increased nearly 800 percent. Likewise, vacancies were up more than 200 percent in 2011 and 2012 compared to 2009 (see Table 2).

Greater Flexibility, Smaller Wages

Because Retail jobs are in constant demand throughout the region, they can be great for workers looking for flexible work schedules, fast-paced work environments, easy to learn job skills through short-term on-the-job training, and opportunities for advancement or job mobility. However, jobseekers might not find opportunities in the industry quite as great if they desire full-time hours, higher wages, or benefits like health care insurance.

Over the course of the last six years, during both the recession and the recovery, Retail Trade has maintained a higher reliance on part-time workers and seasonal hiring than the total of all industries. On average, about 42.5 percent of all job vacancies in the region were part-time compared to 73.9 percent of Retail vacancies.

Likewise, wage offers in Retail Trade were always lower than in other industries, settling between $7.00 and $8.00 per hour from 2007 to 2011, before climbing to $9.00 in 2012. As shown in Table 1, although Retail Trade accounts for 11.6 percent of total jobs, it provides just 6.8 percent of total payroll. Average annual wages were about $15,000 lower in Retail Trade than the total of all industries in Southwest Minnesota, at $20,533 versus $34,963 in 2012, respectively.

While wages are important, many jobseekers now consider benefit packages to be equally important in evaluating the net worth of a job. Table 2 shows that Retail Trade jobs are also less likely to offer health care benefits, though there have been exceptions to that rule over the last six years. Just over half (53.7%) of all job vacancies in the region during that time frame have offered health care benefits compared to 41.3 percent of Retail vacancies.

Table 3: Southwest Minnesota Projected Retail Trade Employment Growth, 2010-2020

Industry	Estimated 2010 Employment	Projected 2020 Employment	Percent Change (2010-2020)	Numeric Change (2010-2020)
Total All Industries	**206,339**	**227,716**	**+10.0%**	**+21,377**
Retail Trade	**19,812**	**21,316**	**+7.6%**	**+1,504**
Other General Merchandise Stores	1,691	2,750	+62.6%	+1,059
Furniture Stores	254	320	+26.0%	+66
Sporting Goods/Music Instrument Stores	439	545	+24.1%	+106
Beer, Wine, and Liquor Stores	183	219	+19.7%	+36
Other Miscellaneous Store Retailers	303	362	+19.5%	+59
Health and Personal Care Stores	978	1,155	+18.1%	+177
Building Material and Supplies Dealers	1,451	1,700	+17.2%	+249
Other Motor Vehicle Dealers	144	166	+15.3%	+22
Clothing Stores	745	855	+14.8%	+110
Auto Parts, Accessories, and Tire Stores	692	750	+8.4%	+58
Home Furnishings Stores	130	140	+7.7%	+10
Direct Selling Establishments	323	346	+7.1%	+23
Automobile Dealers	1,290	1,363	+5.7%	+73
Jewelry, Luggage, and Leather Stores	125	127	+1.6%	+2
Grocery Stores	4,282	4,260	-0.5%	-22
Gasoline Stations	2,355	2,204	-6.4%	-151
Specialty Food Stores	307	285	-7.2%	-22
Department Stores	2,544	2,340	-8.0%	-204
Lawn and Garden Equip./Supplies Stores	184	168	-8.7%	-16
Florists	99	67	-32.3%	-32
Book, Periodical, and Music Stores	119	43	-63.9%	-76

Source: DEED 2010-2020 Employment Outlook data tool

Navigating the Amazon

While this rebound in Retail employment is encouraging for jobseekers, is it sustainable? According to DEED's 2010 to 2020 employment projections, Southwest Minnesota is projected to gain about 21,500 jobs over the decade, a 10 percent increase. Retail Trade employment is expected to expand 7.6 percent from 2010 to 2020, a rise of just over 1,500 jobs.

Nine Retail subsectors are projected to exceed that overall rate of growth; ranging from a 62.6 percent increase in Other General Merchandise Stores to a 24.1 percent jump in Sporting Goods and Musical Instruments Stores to a 14.8 percent boost in Clothing Stores. Five other subsectors are also expected to grow between 1.5 and 8.5 percent over the next decade (see Table 3).

But like any industry, advances in technology and productivity could impact employment. The projections also show that many Retail Trade subsectors will likely lose jobs. Southwest Minnesota retailers are not immune to changes like online music downloads replacing the need for music stores, or online retailers such as Amazon.com cutting into the number of brick-and-mortar bookstores. Nor are rising gasoline prices likely to spare local gasoline stations from throttling back on employment to meet profit margins.

These productivity increases and changes in technology — such as self-service checkouts that allow employers to decrease the number of cashiers on staff —

may impact the future workforce, perhaps significantly. Despite these advances, consumers still need to buy some things locally and there will still be a need for workers to assist them.

Turning Back the Clock

Analysis of the demographic profile of Retail Trade jobs in Southwest Minnesota can also help anticipate if there will be a need for more or fewer workers in the future. Data from DEED's Quarterly Workforce Indicators program provides detail on the age groups most likely to be working Retail, with notable changes over time.

In the second quarter of 2012 almost one-third (31.5%) of the Retail Trade workforce in Southwest Minnesota was under 25 years of age compared to just 16.2 percent across all industries collectively. In contrast, less than half (48.0%) of Retail workers were in the 25 to 54 year old age group compared to 61 percent of all workers. Finally, about one-fifth (20.5%) of workers in Retail Trade were 55 years and over, which was slightly lower than the 22.9 percent of workers in all industries (see Table 4).

Often used as the source of a first job, the Retail Trade industry employed 35 percent of the region's 14 to 18 year old workers, 26 percent of 19 to 21 year old workers, and 18 percent of 22 to 24 year old workers, but only about 10 percent of the 25 to 64 year old workers. With the flexible hours and job training requirements, Retail Trade now also employs just over 15 percent of the region's oldest workers, 65 years and over.

Much like the jobs themselves, the demographic profile of the workers shifted during the recession. While workers under 25 years of age still make up the largest pool of workers in the industry, the percentage of younger workers declined significantly over the last six years, dropping from 34.9 percent of total workers in 2007 to 31.5 percent in 2012. Teenagers saw the biggest decline in employment during the recession as they were replaced by older workers (see Table 4).

Instead, the percentage of Retail Trade workers that were 55 years and over jumped from 16.4 percent in 2007 to 20.5 percent in 2012. Although the percentage of workers in the 25 to 54 year old age groups stayed essentially the same, the Retail Trade workforce aged faster than the total of all industries in the last six years, with fewer younger workers and more older workers.

Given the flexibility of the industry from higher amounts of part-time employment and seasonality, retailers have come to rely on two key age groups for workers — under 25 and over 55 years of age. Essentially, jobs in Retail Trade afford high school and college students, as well as older or retired workers looking for part-time work, an opportunity to participate in the labor force in a flexible work environment. During the recession and recovery, it also provided an alternative for people seeking to retain employment between jobs, after a layoff, immediately following college, or after retiring from a career. And though technology will change the job requirements, demand for the jobs will likely remain strong in the future.

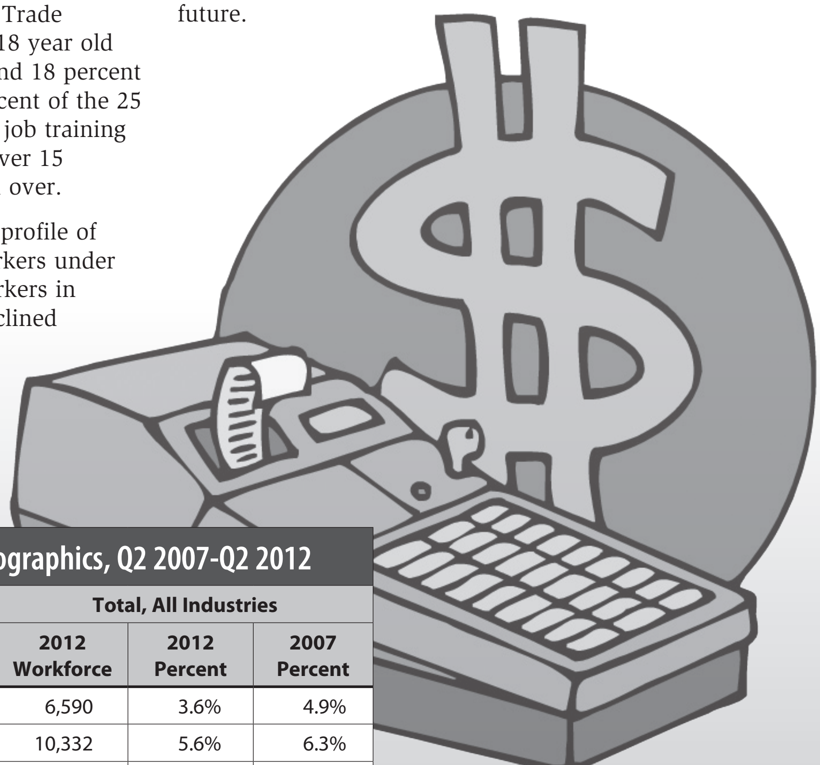


Table 4: Southwest Minnesota Workforce Demographics, Q2 2007-Q2 2012

	Retail Trade			Total, All Industries		
	2012 Workforce	2012 Percent	2007 Percent	2012 Workforce	2012 Percent	2007 Percent
14-18 years	2,309	9.9%	13.7%	6,590	3.6%	4.9%
19-21 years	2,697	11.6%	11.4%	10,332	5.6%	6.3%
22-24 years	2,340	10.0%	9.8%	12,813	7.0%	7.3%
25-34 years	4,399	18.8%	17.3%	38,620	21.0%	19.3%
35-44 years	2,870	12.3%	14.4%	32,855	17.9%	19.6%
45-54 years	3,943	16.9%	16.9%	40,702	22.1%	23.6%
55-64 years	3,275	14.0%	10.7%	32,266	17.5%	14.3%
65 years & over	1,515	6.5%	5.7%	9,838	5.3%	4.7%

Source: DEED Quarterly Workforce Indicators (QWI) program

by Brent Pearson and Cameron Macht
Labor Market Information Office
Minnesota Department of Employment and Economic Development

Measuring Minnesota

A country, state, or region's Gross Domestic Product (GDP) represents the market value of goods and services produced within that area, and it has become a primary measure of economic activity in the United States. The U.S. Bureau of Economic Analysis (BEA) recently released its state-by-state GDP information for 2012, and their findings provide some interesting and encouraging news for Minnesota.

Perhaps the most striking thing about Minnesota's GDP is the speed with which it grew in 2012. According to the BEA Minnesota's economy had the fifth fastest growth rate in the country, tied with California with a 3.5 percent increase over the year. North Dakota, with its booming oil industry, ranked first at 13.4 percent, which is nearly three times the 4.8 percent growth in second-place Texas. GDP increased in 49 states plus the District of Columbia (decreasing only in Connecticut), leading to a national GDP growth rate of 2.5 percent.

Table 1

States by 2012 Per Capita Gross Domestic Product

State	Per Capita GDP (2005 Dollars)	National Rank
North Dakota	55,250	3
MINNESOTA	**47,028**	**12**
Illinois	46,151	16
Nebraska	44,943	18
South Dakota	43,181	20
UNITED STATES	42,784	--
Iowa	42,222	23
Kansas	41,070	25
Wisconsin	39,308	29
Indiana	39,065	31
Ohio	37,690	34
Missouri	26,815	36
Michigan	35,298	38

Source: United States Department of Commerce, Bureau of Economic Analysis www.bea.gov/newsreleases/regional/gdp_state/gsp_newsrelease.htm

As Table 1 shows, Minnesota also performs quite well in per capita GDP, a measure of how much value a state produces per resident. Among our regional neighbors we trail only North Dakota, with its small population and growing economy, in this category. The Midwest in general, however, performs fairly poorly by this measure. Of the eight BEA designated regions, Minnesota's Plains area and the neighboring Great Lakes states (IL, IN, MI, OH and WI) have the fourth and second lowest per capita GDPs, respectively, in the United States. The least productive region in the country is the Southeast, which includes the states with the four lowest per capita GDPs (Mississippi, West Virginia, Arkansas and South Carolina).

The total value of Minnesota's GDP in 2012 was $253 billion, the 17th highest in the country.

by Nick Dobbins

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.

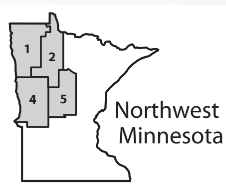
County/Area	Labor Force Aug 2013	Labor Force July 2013	Labor Force Aug 2012	Employment Aug 2013	Employment July 2013	Employment Aug 2012	Unemployment Aug 2013	Unemployment July 2013	Unemployment Aug 2012	Rate of Unemployment Aug 2013	Rate of Unemployment July 2013	Rate of Unemployment Aug 2012
United States ('000s)												
(Seasonally adjusted)	155,486	155,798	154,645	144,170	144,285	142,101	11,316	11,514	12,544	7.3%	7.4%	8.1%
(Unadjusted)	155,971	157,196	155,255	144,509	145,113	142,558	11,462	12,083	12,696	7.3	7.7	8.2
Minnesota												
(Seasonally adjusted)	2,970,779	2,978,498	2,965,642	2,818,306	2,824,557	2,796,185	152,473	153,941	169,457	5.1	5.2	5.7
(Unadjusted)	2,989,164	3,013,086	2,980,788	2,847,089	2,860,031	2,815,089	142,075	153,055	165,699	4.8	5.1	5.6
Metropolitan Statistical Areas (MSA)*												
Mpls.-St. Paul MSA	1,882,221	1,899,123	1,862,091	1,793,835	1,805,113	1,758,120	88,386	94,010	103,971	4.7	5.0	5.6
Duluth-Superior MSA	142,578	144,395	144,706	134,066	135,067	135,271	8,512	9,328	9,435	6.0	6.5	6.5
Rochester MSA	105,513	106,524	107,193	101,192	101,875	102,279	4,321	4,649	4,914	4.1	4.4	4.6
St. Cloud MSA	108,444	108,226	108,324	103,316	102,641	102,370	5,128	5,585	5,954	4.7	5.2	5.5
Grand Forks MSA	52,205	52,039	53,071	50,142	49,992	50,929	2,063	2,047	2,142	4.0	3.9	4.0
Fargo-Moorhead MSA	120,738	120,927	120,463	117,147	117,019	116,361	3,591	3,908	4,102	3.0	3.2	3.4
Region One	**49,760**	**49,954**	**50,113**	**47,553**	**47,483**	**47,693**	**2,207**	**2,471**	**2,420**	**4.4**	**4.9**	**4.8**
Kittson	2,681	2,676	2,771	2,553	2,532	2,636	128	144	135	4.8	5.4	4.9
Marshall	5,484	5,528	5,497	5,185	5,192	5,173	299	336	324	5.5	6.1	5.9
Norman	3,693	3,722	3,685	3,529	3,539	3,496	164	183	189	4.4	4.9	5.1
Pennington	9,410	9,429	9,441	9,011	8,989	9,024	399	440	417	4.2	4.7	4.4
Polk	17,258	17,354	17,380	16,501	16,477	16,537	757	877	843	4.4	5.1	4.9
Red Lake	2,283	2,298	2,389	2,174	2,179	2,265	109	119	124	4.8	5.2	5.2
Roseau	8,951	8,947	8,950	8,600	8,575	8,562	351	372	388	3.9	4.2	4.3
Region Two	**40,476**	**40,981**	**40,393**	**37,973**	**38,185**	**37,515**	**2,503**	**2,796**	**2,878**	**6.2**	**6.8**	**7.1**
Beltrami	21,958	22,125	21,675	20,622	20,644	20,135	1,336	1,481	1,540	6.1	6.7	7.1
Clearwater	4,030	4,105	4,103	3,677	3,709	3,737	353	396	366	8.8	9.6	8.9
Hubbard	9,702	9,918	9,795	9,140	9,284	9,133	562	634	662	5.8	6.4	6.8
Lake of the Woods	2,331	2,385	2,350	2,203	2,234	2,205	128	151	145	5.5	6.3	6.2
Mahnomen	2,455	2,448	2,470	2,331	2,314	2,305	124	134	165	5.1	5.5	6.7
Region Three	**167,532**	**169,229**	**170,389**	**157,418**	**158,206**	**159,275**	**10,114**	**11,023**	**11,114**	**6.0**	**6.5**	**6.5**
Aitkin	7,201	7,205	7,419	6,773	6,731	6,930	428	474	489	5.9	6.6	6.6
Carlton	17,385	17,564	17,806	16,431	16,545	16,618	954	1,019	1,188	5.5	5.8	6.7
Cook	3,612	3,586	3,650	3,480	3,436	3,501	132	150	149	3.7	4.2	4.1
Itasca	23,412	23,557	23,907	21,853	21,863	22,270	1,559	1,694	1,637	6.7	7.2	6.8
Koochiching	6,733	6,817	6,778	6,251	6,298	6,302	482	519	476	7.2	7.6	7.0
Lake	6,807	6,864	6,767	6,486	6,519	6,417	321	345	350	4.7	5.0	5.2
St. Louis	102,382	103,636	104,062	96,144	96,814	97,237	6,238	6,822	6,825	6.1	6.6	6.6
City of Duluth	44,936	45,487	45,928	42,485	42,781	42,968	2,451	2,706	2,960	5.5	5.9	6.4
Balance of St. Louis County	57,446	58,149	58,134	53,659	54,033	54,269	3,787	4,116	3,865	6.6	7.1	6.6
Region Four	**128,470**	**128,179**	**128,405**	**123,664**	**122,884**	**122,869**	**4,806**	**5,295**	**5,536**	**3.7**	**4.1**	**4.3**
Becker	19,144	17,952	19,371	18,354	17,050	18,488	790	902	883	4.1	5.0	4.6
Clay	34,481	34,620	33,984	33,377	33,397	32,684	1,104	1,223	1,300	3.2	3.5	3.8
Douglas	21,395	21,873	21,311	20,612	21,032	20,374	783	841	937	3.7	3.8	4.4
Grant	3,232	3,278	3,299	3,092	3,118	3,119	140	160	180	4.3	4.9	5.5
Otter Tail	31,717	31,849	31,637	30,357	30,366	30,126	1,360	1,483	1,511	4.3	4.7	4.8
Pope	6,562	6,621	6,689	6,338	6,377	6,437	224	244	252	3.4	3.7	3.8
Stevens	6,419	6,467	6,669	6,223	6,250	6,429	196	217	240	3.1	3.4	3.6
Traverse	1,812	1,817	1,772	1,738	1,732	1,685	74	85	87	4.1	4.7	4.9
Wilkin	3,708	3,702	3,673	3,573	3,562	3,527	135	140	146	3.6	3.8	4.0
Region Five	**83,946**	**84,921**	**85,829**	**79,244**	**79,845**	**80,477**	**4,702**	**5,076**	**5,352**	**5.6**	**6.0**	**6.2**
Cass	14,123	14,364	14,447	13,178	13,325	13,351	945	1,039	1,096	6.7	7.2	7.6
Crow Wing	33,521	34,031	34,137	31,661	32,014	32,077	1,860	2,017	2,060	5.5	5.9	6.0
Morrison	17,489	17,581	18,323	16,554	16,589	17,258	935	992	1,065	5.3	5.6	5.8
Todd	12,589	12,641	12,537	11,997	12,010	11,856	592	631	681	4.7	5.0	5.4
Wadena	6,224	6,304	6,385	5,854	5,907	5,935	370	397	450	5.9	6.3	7.0
Region Six East	**66,915**	**67,195**	**65,432**	**63,820**	**63,796**	**61,716**	**3,095**	**3,399**	**3,716**	**4.6**	**5.1**	**5.7**
Kandiyohi	24,982	25,303	24,124	23,991	24,213	22,972	991	1,090	1,152	4.0	4.3	4.8
McLeod	20,156	20,088	20,411	19,145	18,993	19,127	1,011	1,095	1,284	5.0	5.5	6.3
Meeker	12,562	12,610	12,622	11,970	11,950	11,857	592	660	765	4.7	5.2	6.1
Renville	9,215	9,194	8,275	8,714	8,640	7,760	501	554	515	5.4	6.0	6.2

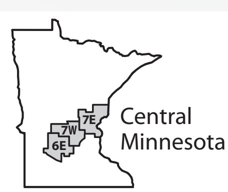
*Minneapolis-St. Paul Metropolitan Statistical Area (MSA) now includes Sherburne County in Minnesota and Pierce County in Wisconsin. St. Cloud MSA is now comprised of Benton and Stearns counties.

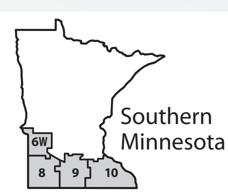
Labor Force Estimates

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

County/ Area	Labor Force			Employment			Unemployment			Rate of Unemployment		
	Aug 2013	July 2013	Aug 2012	Aug 2013	July 2013	Aug 2012	Aug 2013	July 2013	Aug 2012	Aug 2013	July 2013	Aug 2012
Region Six West	**24,972**	**25,289**	**25,454**	**23,855**	**24,083**	**24,227**	**1,117**	**1,206**	**1,227**	**4.5%**	**4.8%**	**4.8%**
Big Stone	2,963	3,012	2,994	2,847	2,891	2,861	116	121	133	3.9	4.0	4.4
Chippewa	7,218	7,284	7,441	6,911	6,943	7,097	307	341	344	4.3	4.7	4.6
Lac Qui Parle	4,074	4,120	4,248	3,888	3,919	4,064	186	201	184	4.6	4.9	4.3
Swift	5,263	5,296	5,148	5,013	5,025	4,869	250	271	279	4.8	5.1	5.4
Yellow Medicine	5,454	5,577	5,623	5,196	5,305	5,336	258	272	287	4.7	4.9	5.1
Region Seven East	**84,107**	**84,923**	**84,367**	**79,507**	**79,815**	**78,921**	**4,600**	**5,108**	**5,446**	**5.5**	**6.0**	**6.5**
Chisago	28,766	29,127	28,490	27,399	27,568	26,869	1,367	1,559	1,621	4.8	5.4	5.7
Isanti	20,810	21,047	20,644	19,842	19,965	19,459	968	1,082	1,185	4.7	5.1	5.7
Kanabec	8,034	8,109	8,190	7,454	7,481	7,533	580	628	657	7.2	7.7	8.0
Mille Lacs	12,205	12,263	12,565	11,397	11,374	11,596	808	889	969	6.6	7.2	7.7
Pine	14,292	14,377	14,478	13,415	13,427	13,464	877	950	1,014	6.1	6.6	7.0
Region Seven West	**228,158**	**229,104**	**226,863**	**217,592**	**217,621**	**214,435**	**10,566**	**11,483**	**12,428**	**4.6**	**5.0**	**5.5**
Benton	22,394	22,327	22,327	21,267	21,128	21,072	1,127	1,199	1,255	5.0	5.4	5.6
Sherburne	49,752	50,225	49,322	47,401	47,693	46,484	2,351	2,532	2,838	4.7	5.0	5.8
Stearns	86,050	85,899	85,997	82,049	81,513	81,298	4,001	4,386	4,699	4.6	5.1	5.5
Wright	69,962	70,653	69,217	66,875	67,287	65,581	3,087	3,366	3,636	4.4	4.8	5.3
Region Eight	**68,628**	**69,484**	**70,194**	**66,040**	**66,226**	**67,135**	**2,588**	**3,258**	**3,059**	**3.8**	**4.7**	**4.4**
Cottonwood	6,364	6,740	6,558	6,094	6,134	6,173	270	606	385	4.2	9.0	5.9
Jackson	7,293	7,415	7,436	7,060	7,107	7,154	233	308	282	3.2	4.2	3.8
Lincoln	3,538	3,578	3,673	3,418	3,445	3,527	120	133	146	3.4	3.7	4.0
Lyon	14,435	14,537	14,994	13,843	13,895	14,328	592	642	666	4.1	4.4	4.4
Murray	5,998	6,052	6,043	5,816	5,812	5,838	182	240	205	3.0	4.0	3.4
Nobles	11,403	11,404	11,533	10,991	10,926	11,032	412	478	501	3.6	4.2	4.3
Pipestone	5,748	5,775	5,855	5,562	5,571	5,626	186	204	229	3.2	3.5	3.9
Redwood	8,404	8,508	8,588	7,993	8,052	8,154	411	456	434	4.9	5.4	5.1
Rock	5,445	5,475	5,514	5,263	5,284	5,303	182	191	211	3.3	3.5	3.8
Region Nine	**132,301**	**133,202**	**132,026**	**126,429**	**126,733**	**125,075**	**5,872**	**6,469**	**6,951**	**4.4**	**4.9**	**5.3**
Blue Earth	37,350	38,039	37,523	35,745	36,262	35,577	1,605	1,777	1,946	4.3	4.7	5.2
Brown	15,796	15,772	15,477	15,144	15,042	14,724	652	730	753	4.1	4.6	4.9
Faribault	7,802	7,776	7,683	7,423	7,377	7,254	379	399	429	4.9	5.1	5.6
Le Sueur	14,618	14,664	14,554	13,843	13,807	13,642	775	857	912	5.3	5.8	6.3
Martin	11,642	11,655	11,345	11,105	11,079	10,758	537	576	587	4.6	4.9	5.2
Nicollet	18,964	19,278	19,100	18,233	18,496	18,146	731	782	954	3.9	4.1	5.0
Sibley	10,244	10,133	10,422	9,850	9,696	9,977	394	437	445	3.8	4.3	4.3
Waseca	10,461	10,363	10,510	9,950	9,811	9,915	511	552	595	4.9	5.3	5.7
Watonwan	5,424	5,522	5,412	5,136	5,163	5,082	288	359	330	5.3	6.5	6.1
Region Ten	**273,791**	**276,251**	**277,890**	**261,526**	**263,056**	**263,513**	**12,265**	**13,195**	**14,377**	**4.5**	**4.8**	**5.2**
Dodge	11,250	11,392	11,466	10,760	10,833	10,876	490	559	590	4.4	4.9	5.1
Fillmore	11,488	11,483	11,759	10,984	10,933	11,170	504	550	589	4.4	4.8	5.0
Freeborn	16,141	16,198	16,426	15,349	15,376	15,495	792	822	931	4.9	5.1	5.7
Goodhue	25,644	25,884	26,400	24,442	24,586	25,046	1,202	1,298	1,354	4.7	5.0	5.1
Houston	10,488	10,643	10,467	9,997	10,069	9,895	491	574	572	4.7	5.4	5.5
Mower	21,310	21,495	21,612	20,390	20,509	20,574	920	986	1,038	4.3	4.6	4.8
Olmsted	82,367	83,095	83,627	79,033	79,566	79,882	3,334	3,529	3,745	4.0	4.2	4.5
City of Rochester	60,092	60,667	61,001	57,612	58,000	58,231	2,480	2,667	2,770	4.1	4.4	4.5
Rice	32,448	33,042	32,972	30,690	31,146	30,823	1,758	1,896	2,149	5.4	5.7	6.5
Steele	21,521	21,448	21,321	20,577	20,462	20,080	944	986	1,241	4.4	4.6	5.8
Wabasha	11,896	12,037	12,100	11,399	11,476	11,521	497	561	579	4.2	4.7	4.8
Winona	29,238	29,534	29,740	27,905	28,100	28,151	1,333	1,434	1,589	4.6	4.9	5.3
Region Eleven	**1,640,111**	**1,654,377**	**1,623,437**	**1,562,467**	**1,572,099**	**1,532,238**	**77,644**	**82,278**	**91,199**	**4.7**	**5.0**	**5.6**
Anoka	191,930	193,694	190,172	182,790	183,917	179,254	9,140	9,777	10,918	4.8	5.0	5.7
Carver	51,623	52,084	51,057	49,406	49,711	48,450	2,217	2,373	2,607	4.3	4.6	5.1
Dakota	235,135	237,203	232,466	224,476	225,860	220,133	10,659	11,343	12,333	4.5	4.8	5.3
Hennepin	671,810	677,359	664,550	639,543	643,486	627,170	32,267	33,873	37,380	4.8	5.0	5.6
City of Bloomington	49,008	49,427	48,416	46,707	46,995	45,803	2,301	2,432	2,613	4.7	4.9	5.4
City of Minneapolis	219,648	221,482	217,396	208,500	209,786	204,467	11,148	11,696	12,929	5.1	5.3	5.9
Ramsey	278,307	280,848	276,034	264,314	265,943	259,200	13,993	14,905	16,834	5.0	5.3	6.1
City of St. Paul	149,137	150,513	148,066	141,007	141,876	138,278	8,130	8,637	9,788	5.5	5.7	6.6
Scott	75,963	76,655	74,987	72,615	73,062	71,210	3,348	3,593	3,777	4.4	4.7	5.0
Washington	135,343	136,534	134,171	129,323	130,120	126,821	6,020	6,414	7,350	4.4	4.7	5.5







Industrial Analysis

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

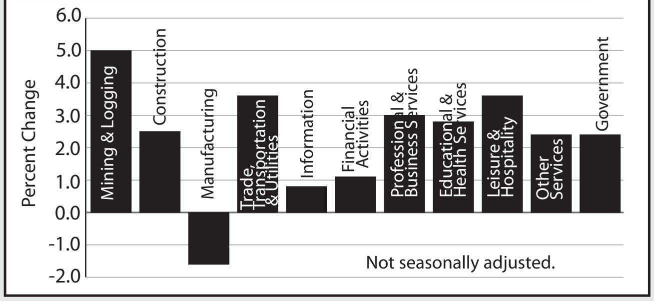
Overview

Employment increased by 12,200 in August 2013, and the July 2013 change was revised downward from an increase of 4,300 to an increase of only 2,700. Over-the-year, overall employment increased 63,100 before the seasonal adjustment for a 2.3 percent increase. Although the percent change was similar in Private and in Government employment, Goods Producing declines counterbalanced the effects of healthy gains in most Private Service Providing industries. Government employment increased 1,900 for a 0.5 percent increase, and again this month most of the gains were in Local Government. Goods Producing industries employment fell 2,300 (0.6 percent), driven by losses in Manufacturing (down 3,400 or 1.1 percent). In Service-Providing industries performance was mixed, but only Information and Professional and Business Services saw declines. The two industries driving the upswing were Trade, Transportation, and Utilities and Educational and Health Services, mostly from the education side. August was the first month where employment regained the pre-recession peak from February 2008 of 2,780,900.

Mining and Logging

Employment in Mining and Logging was flat (0.0 percent and 0 numerically). In fact, employment has been largely flat -- or showed only very small gains -- for the past year and a half, so this is on trend. Hiring in Mining has slowed as new mines reach capacity and slowly rising water levels limit shipping. Logging has suffered along with the printing and paper industry in northern Minnesota.

MN Employment Growth
August 2012 to August 2013



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

Construction

Construction employment increased 1,100 for a monthly increase of 1.1 percent. Construction permits and starts have been performing well recently, and the good weather helped. Moderate gains in the seasonally adjusted data are a likely response to these factors.

Manufacturing

Employment in Manufacturing declined 3,400 (1.1 percent) over the month. After bottoming in January 2010, Manufacturing employment appeared to have been on a growth trajectory. That slowed last year, and only two months this year have seen any gains. While August saw the most substantial monthly loss in the year, combined with the moderate losses of recent months employment is back down to 2011 levels. The bulk of the loss came from Durable Goods manufacturing: Employment fell 2,800 (1.4 percent). But the monthly change doesn't seem to reflect a larger trend in the strength of Manufacturing component industries.

Trade, Transportation, and Utilities

With an increase of 6,000 (1.2 percent), Trade, Transportation, and Utilities employment saw its largest post-recession one-month gain and achieved a new high of 518,700. Retail Trade and Transportation, Warehousing, and Utilities were the subsectors that drove the increases, gaining 3,600 (1.3 percent) and 1,500 (1.6 percent) respectively. While Transportation, Warehousing, and Utilities has been gaining as steadily as the supersector, Retail Trade's trend has been much more sporadic and is frequently reversed by poor months.

Information

Employment in Information decreased 900 (1.6 percent). August was another loss where, year to date, there have been equal monthly losses and gains. The industry has stronger and weaker periods but no clear post-recessionary trend.

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

Financial Activities

Financial Activities employment increased 100 (0.1 percent) over the month and 2,000 (1.1 percent) over the year. The two component industries, Finance and Insurance (up 400, 0.3 percent) and Real Estate and Rental and Leasing (down 300, 0.8 percent) had opposite effects on the total, resulting in the nearly flat total employment change. Real Estate and Rental and Leasing has been seeing balanced gains and losses over the last year. Given reports of the strength of the housing market, August's loss is unexpected.

Professional and Business Services

Employment in Professional and Business Services declined 1,100 (0.3 percent) over the month. Despite frequent poor performance in the industry, which has nearly as many declining months as gaining, employment is up 10,200 (3.0 percent) over the year.

Educational and Health Services

Employment in Educational and Health Services increased 5,500 (1.1 percent). Educational and Health Services is one industry where there have been consistent gains. The last two months were exceptions to that, but August's strong growth has put the industry at a new high, despite a downward revision to the July numbers. In the Educational Services component industry employment increased 4,200 (6.9 percent). The largest part of the Educational and Health Services gain came from Private Education in August. Over the last several years, however, Private Education has been on only a slight and inconsistent growth pattern. August's gain nearly reverses the losses of June and July, but keeps employment in the range that has been normal for the last few years. Health Care and Social Assistance was up 1,300 (0.3 percent), another increase in an industry for which growth has been steady and reliable.

Leisure and Hospitality

In August, employment in Leisure and Hospitality increased 700 (0.3 percent). Gains were driven by strong growth in Arts, Entertainment, and Recreation (up 1,000, 2.6 percent). In this sub-industry, August's gain neatly reverses July's loss of the same amount. Overall, this is a moderate drop-off from the post-recession peak last winter, although this month it significantly outperformed the other component industry of Leisure and Hospitality, Accommodation and Food Services. Typically the reverse is true. It is likely an anomaly.

Other Services

Other Services has seen increases since the recession, but only very slight ones and very inconsistently, with largely alternating gains and losses. August's gain of 2,300 (2.0 percent) was the most substantial single-month change for the industry in the seasonally adjusted series and follows another unusually large change in July.

Government

Employment in Local Government increased 1,200 (0.4 percent). In August, Local Government employment saw slight gains. Following July's unusual gains and speculation about the effects of recent legislation this raises questions. In the unadjusted series the two-month change from June to August is about normal, so it's possible the legislation mostly spurred permanent hires earlier than usual because it eliminated uncertainty. Overall, Government employment increased 1,900 (0.5 percent) for August.

by Amanda Rohrer

Seasonally Adjusted Nonfarm Employment

In 1,000's

Industry	August 2013	July 2013	June 2013
Total Nonagricultural	**2,786.0**	**2,773.8**	**2,771.1**
Goods-Producing	**404.4**	**406.7**	**409.8**
Mining and Logging	7.4	7.4	7.4
Construction	97.6	96.5	97.9
Manufacturing	299.4	302.8	304.5
Service-Providing	**2,381.6**	**2,367.1**	**2,361.3**
Trade, Transportation, and Utilities	518.7	512.7	512.1
Information	54.5	55.4	54.2
Financial Activities	179.6	179.5	177.4
Professional and Business Services	350.0	351.1	351.9
Educational and Health Services	489.8	484.3	487.7
Leisure and Hospitality	250.9	250.2	249.4
Other Services	120.0	117.7	116.4
Government	418.1	416.2	412.2

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

Regional Analysis

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

Employment in the Minneapolis-St. Paul-Bloomington MSA increased 1,009 (0.1 percent) over the month of August and was up 56,857 (3.2 percent) over the year. Government employment fell 4,095 (1.8 percent) over the month, proportionately split between State and Local Government. Private Sector gains overcame the loss, with the most significant gains coming from Mining, Logging, and Construction (up 578, 0.8 percent), Trade, Transportation, and Utilities (up 2,636, 0.8 percent) and Other Services (up 2,044, 2.7 percent). Only Leisure and Hospitality saw a substantial decline, falling 1,063 (0.6 percent). Over the year Government fared a little better than the Private Sector, growing 4.3 percent compared to 3.1 percent. The most substantial growth in individual industries occurred in Mining, Logging, and Construction (up 8.4 percent, 5,425) and in Leisure and Hospitality (up 6.0 percent, 10,418).

Duluth-Superior MSA

Employment in the Duluth-Superior MSA declined 5 (0.0 percent) over the month, and 167 (0.1 percent) over the year. Over the month Private Sector employment increased 134 (0.1 percent), but was counterbalanced by Government employment which fell 139 (0.6 percent). The Private Sector numeric gains were in Mining, Logging, and Construction (up 47, 0.6 percent) and in Trade, Transportation, and Utilities (up 53, 0.2 percent), while the Government losses were driven by State government employment which fell 219 (3.3 percent). There were moderate gains in Local and Federal Government. Over the year the loss was mostly from Mining, Logging, and Utilities and from Government.

Rochester MSA

Employment in the Rochester MSA increased 18 over the month (0.0 percent) and increased 0.1 percent (78) over the year. Government employment fell 107 (1.1 percent) over the month, but gains in Mining, Logging, and Construction (up 24, 0.7 percent) and in Manufacturing (up 81, 0.8 percent) largely balanced the loss. The most significant Private Service-Providing changes were in Leisure and Hospitality (up 43, 0.4 percent) and in Other Services (down 53, 1.4 percent). Over the year Private Services largely fared well while Government fell 4.9 percent (517) and Manufacturing fell 4.1 percent (450).

St. Cloud MSA

Employment in the St. Cloud MSA increased 1,030 (1.0 percent) over the month and increased 2,262 (2.2 percent) over the year. Government employment (up 22, 0.2 percent) and Goods-Producing employment (down 19, 0.1 percent) were largely flat, so most of the monthly change came from Private Service-Providing industries (up 1,027, 1.5 percent). For most industries, monthly change was moderate; the growth came from Educational and Health Services (up 684, 3.6 percent), Leisure and Hospitality (up 330, 3.7 percent), and from Trade, Transportation, and Utilities (up 184, 0.9 percent).

Mankato-North Mankato MSA

Employment in the Mankato-North Mankato MSA declined 470 (0.9 percent) over the month and increased 772 (1.5 percent) over the year. Government employment was the only sector that saw a monthly gain and was up only 15 (0.2 percent) over the month. Numerically the Private Sector losses came from Service-Providing industries (down 334, 1.0 percent), while percentage-wise Goods-Producing industries fared a little worse (down 151, 1.5 percent). Over the year the strongest sector was Goods-Producing (up 228, 2.4 percent).

Fargo-Moorhead MSA

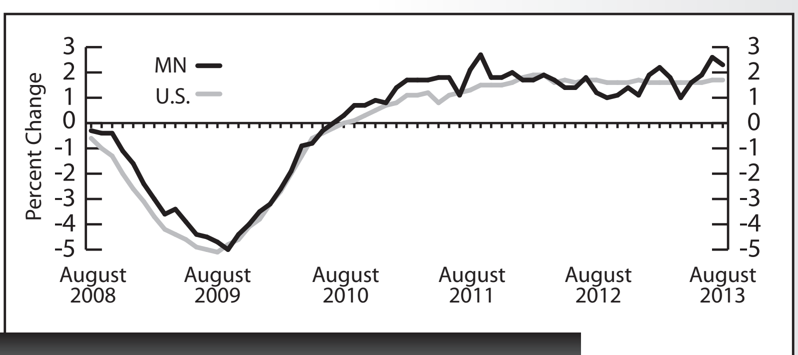
Employment in the Fargo-Moorhead MSA increased 739 (0.6 percent) over the month and 4,369 (3.4 percent) over the year. Government employment increased 247 (1.7 percent) over the month, largely from Local Government employment, although there were moderate declines in Federal and State Government as well. The most significant gains in Private Sector industries came in Mining, Logging, and Construction (up 119, 1.2 percent) and in Trade, Transportation, and Utilities (up 228, 0.8 percent). Educational and Health Services saw a slight decline (down 39, 0.2 percent over the month).

Grand Forks-East Grand Forks MSA

Employment in the Grand Forks-East Grand Forks MSA increased 157 (0.3 percent) over the month and 608 (1.1 percent) over the year. There was a slight decline in government employment (down 11, 0.1 percent), mostly a State decline nearly outweighed by Federal gains. The overall monthly growth, however, came from the Private Sector, but even that was inconsistent across industries. Mining, Logging, and Construction fell 90 (2.5 percent), while Trade, Transportation, and Utilities increased 98 (0.8 percent) and Leisure and Hospitality increased 123 (2.1 percent).

by Amanda Rohrer

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	
	Aug 2013	Jul 2013	Aug 2012	Jul 2013	Aug 2012	Aug 2013	Aug 2012	Aug 2013	Aug 2012	Aug 2013	Aug 2012
TOTAL NONFARM WAGE AND SALARY	**2,807.0**	**2,798.9**	**2,743.9**	**0.3%**	**2.3%**	—	—	—	—	—	—
						—	—	—	—	—	—
GOODS-PRODUCING	**425.3**	**425.7**	**427.3**	**-0.1**	**-0.5**	—	—	—	—	—	—
Mining and Logging	**7.9**	**7.9**	**7.5**	**-0.2**	**5**	—	—	—	—	—	—
Construction	**110.9**	**110.0**	**108.1**	**0.8**	**2.5**	—	—	—	—	—	—
Specialty Trade Contractors	68.6	67.6	67.3	1.4	1.9	$1,206.46	$1,241.83	40.8	41.7	$29.57	$29.78
Manufacturing	**306.6**	**307.8**	**311.6**	**-0.4**	**-1.6**	**822.12**	**782.28**	**41.5**	**41.0**	**19.81**	**19.08**
Durable Goods	196.1	197.6	197.9	-0.8	-0.9	825.59	795.91	41.3	40.9	19.99	19.46
Wood Product Manufacturing	11.0	11.2	11.0	-1.3	0.5	—	—	—	—	—	—
Fabricated Metal Production	41.9	42.3	41.7	-1.1	0.4	—	—	—	—	—	—
Machinery Manufacturing	31.8	31.9	32.3	-0.2	-1.5	—	—	—	—	—	—
Computer and Electronic Product	45.4	45.9	45.8	-1.1	-1	—	—	—	—	—	—
Navigational, Measuring, Electromedical and Control	25.2	25.4	25.1	-0.7	0.4	—	—	—	—	—	—
Transportation Equipment	10.1	10.1	10.7	0.6	-5.6	—	—	—	—	—	—
Medical Equipment and Supplies Manufacturing	15.9	15.9	15.8	0	0.4	—	—	—	—	—	—
Nondurable Goods	110.5	110.2	113.8	0.2	-2.9	814.82	761.58	41.7	41.1	19.54	18.53
Food Manufacturing	44.8	44.3	46.3	1.2	-3.2	—	—	—	—	—	—
Paper Manufacturing	32.4	32.8	33.7	-1.2	-3.7	—	—	—	—	—	—
Printing and Related	22.8	23.0	23.3	-0.8	-2.3	—	—	—	—	—	—
SERVICE-PROVIDING	**2,381.7**	**2,373.2**	**2,316.6**	**0.4**	**2.8**	—	—	—	—	—	—
Trade, Transportation, and Utilities	**523.0**	**516.6**	**504.7**	**1.2**	**3.6**	—	—	—	—	—	—
Wholesale Trade	134.9	134.0	130.5	0.7	3.4	946.86	938.95	38.6	37.8	24.53	24.84
Retail Trade	293.3	289.8	285.0	1.2	2.9	388.88	380.32	28.2	28.9	13.79	13.16
Motor Vehicle and Parts	31.6	31.6	31.2	0.1	1.3	—	—	—	—	—	—
Building Material and Garden Equipment	25.8	26.4	25.6	-2.6	0.5	—	—	—	—	—	—
Food and Beverage Stores	51.7	51.2	51.3	1	0.6	—	—	—	—	—	—
Gasoline Stations	24.4	24.2	23.7	0.8	2.7	—	—	—	—	—	—
General Merchandise Stores	60.6	60.1	61.3	0.8	-1.3	317.81	327.70	29.4	29.9	10.81	10.96
Transportation,Warehouse, Utilities	94.7	92.9	89.2	2	6.2	—	—	—	—	—	—
Transportation and Warehousing	81.9	80.1	76.5	2.3	7.1	611.90	714.18	36.1	40.1	16.95	17.81
Information	**54.4**	**55.3**	**53.9**	**-1.7**	**0.8**	**766.15**	**737.95**	**35.0**	**32.9**	**21.89**	**22.43**
Publishing Industries	20.6	20.7	21.3	-0.6	-3.6	—	—	—	—	—	—
Telecommunications	13.7	13.7	13.6	-0.1	0.5	—	—	—	—	—	—
Financial Activities	**181.1**	**181.2**	**179.1**	**-0.1**	**1.1**	—	—	—	—	—	—
Finance and Insurance	141.3	141.2	139.3	0	1.5	924.89	931.74	35.6	36.1	25.98	25.81
Credit Intermediation	55.3	55.2	53.5	0.1	3.2	748.74	713.45	34.6	34.6	21.64	20.62
Securities, Commodity Contracts, and Other	18.0	18.1	18.1	-0.6	-0.4	—	—	—	—	—	—
Insurance Carriers and Related	64.9	64.4	64.3	0.9	1	—	—	—	—	—	—
Real Estate and Rental and Leasing	39.8	40.0	39.9	-0.6	-0.3	—	—	—	—	—	—
Professional and Business Services	**354.8**	**356.4**	**344.6**	**-0.5**	**3**	—	—	—	—	—	—
Professional, Scientific, and Technical Services	134.2	134.1	132.4	0.1	1.4	—	—	—	—	—	—
Legal Services	19.3	19.1	19.0	0.8	1.6	—	—	—	—	—	—
Accounting, Tax Preparation	14.9	13.8	14.9	8.1	0.4	—	—	—	—	—	—
Computer Systems Design	31.3	31.3	31.4	0	-0.4	—	—	—	—	—	—
Management of Companies and Enterprises	78.1	78.0	75.6	0.1	3.3	—	—	—	—	—	—
Administrative and Support Services	142.5	144.4	136.6	-1.3	4.3	—	—	—	—	—	—
Educational and Health Services	**486.1**	**480.3**	**473.0**	**1.2**	**2.8**	—	—	—	—	—	—
Educational Services	57.4	54.0	56.9	6.2	0.8	—	—	—	—	—	—
Health Care and Social Assistance	428.8	426.4	416.1	0.6	3	—	—	—	—	—	—
Ambulatory Health Care	140.3	139.8	133.5	0.4	5.1	1,180.95	1,087.35	34.3	33.8	34.43	32.17
Offices of Physicians	68.2	68.2	64.8	0.1	5.2	—	—	—	—	—	—
Hospitals	103.7	103.6	102.4	0.1	1.2	—	—	—	—	—	—
Nursing and Residential Care Facilities	106.8	106.4	104.6	0.4	2.1	421.44	407.54	29.7	28.4	14.19	14.35
Social Assistance	78.0	76.6	75.6	1.8	3.1	—	—	—	—	—	—
Leisure and Hospitality	**272.4**	**272.1**	**263.0**	**0.1**	**3.6**	—	—	—	—	—	—
Arts, Entertainment, and Recreation	48.1	48.0	45.4	0.2	5.7	—	—	—	—	—	—
Accommodation and Food Services	224.4	224.1	217.6	0.1	3.1	—	—	—	—	—	—
Food Services and Drinking Places	192.2	192.1	186.9	0	2.8	255.43	233.04	23.2	22.3	11.01	10.45
Other Services	**120.0**	**117.5**	**117.2**	**2.1**	**2.4**	—	—	—	—	—	—
Religious, Grantmaking, Civic, Professional Organizations	69.3	68.2	69.2	1.5	0.1						
Government	**390.0**	**393.6**	**381.0**	**-0.9**	**2.4**						
Federal Government	31.1	30.7	31.6	1.3	-1.6						
State Government	90.6	92.7	91.3	-2.3	-0.9						
State Government Education	52.2	54.3	53.8	-3.9	-3.1						
Local Government	268.3	270.3	258.0	-0.7	4						
Local Government Education	109.7	109.5	104.5	0.2	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, 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	
	Aug 2013	Jul 2013	Aug 2012	Jul 2013	Aug 2012	Aug 2013	Aug 2012	Aug 2013	Aug 2012	Aug 2013	Aug 2012
TOTAL NONFARM WAGE AND SALARY	**1,827.1**	**1,826.0**	**1,770.2**	**0.1%**	**3.2%**	—	—	—	—	—	—
GOODS-PRODUCING	**254.6**	**254.0**	**248.7**	**0.2**	**2.3**	—	—	—	—	—	—
Mining, Logging, and Construction	**70.3**	**69.7**	**64.9**	**0.8**	**8.4**	—	—	—	—	—	—
Construction of Buildings	14.0	13.9	13.6	0.4	2.8	—	—	—	—	—	—
Specialty Trade Contractors	47.4	47.2	43.0	0.4	10.3	$1,331.90	$1,304.91	41.7	40.5	$31.94	$32.22
Manufacturing	**184.3**	**184.3**	**183.9**	**0**	**0.2**	**826.96**	**830.54**	**40.3**	**41.3**	**20.52**	**20.11**
Durable Goods	127.7	127.9	127.0	-0.2	0.5	851.90	854.90	40.8	41.2	20.88	20.75
Fabricated Metal Production	28.4	28.7	28.2	-0.9	1	—	—	—	—	—	—
Machinery Manufacturing	19.5	19.4	19.8	0.9	-1.4	—	—	—	—	—	—
Computer and Electronic Product	35.8	36.1	35.9	-0.9	-0.2	—	—	—	—	—	—
Navigational, Measuring, Electromedical and Control	23.8	23.9	23.6	-0.3	1.2	—	—	—	—	—	—
Medical Equipment and Supplies Manufacturing	14.2	14.2	14.4	0	-1.6	—	—	—	—	—	—
Nondurable Goods	56.6	56.4	56.9	0.4	-0.4	780.51	785.41	39.4	41.6	19.81	18.88
Food Manufacturing	12.3	12.2	12.4	0.8	-0.2	—	—	—	—	—	—
Printing and Related	14.6	14.6	14.8	-0.2	-1.6	—	—	—	—	—	—
SERVICE-PROVIDING	**1,572.5**	**1,572.0**	**1,521.5**	**0**	**3.4**	—	—	—	—	—	—
Trade, Transportation, and Utilities	**323.7**	**321.0**	**316.3**	**0.8**	**2.3**	—	—	—	—	—	—
Wholesale Trade	82.3	81.5	82.2	1	0.1	962.75	943.55	39.2	36.8	24.56	25.64
Merchant Wholesalers - Durable Goods	43.9	43.0	43.6	2.1	0.5	—	—	—	—	—	—
Merchant Wholesalers - Nondurable Goods	24.5	24.5	24.7	-0.4	-0.8	—	—	—	—	—	—
Retail Trade	177.6	176.5	173.7	0.6	2.2	385.73	358.51	28.3	29.1	13.63	12.32
Food and Beverage Stores	29.2	29.0	28.9	0.8	1	—	—	—	—	—	—
General Merchandise Stores	36.5	36.5	37.1	-0.2	-1.7	331.66	334.96	30.4	30.9	10.91	10.84
Transportation, Warehouse, Utilities	63.8	63.0	60.3	1.2	5.7	—	—	—	—	—	—
Utilities	7.4	7.4	7.4	-0.1	0	—	—	—	—	—	—
Transportation and Warehousing	56.4	55.6	52.9	1.4	6.6	740.23	749.98	41.4	42.3	17.88	17.73
Information	**39.0**	**39.1**	**39.1**	**-0.3**	**-0.2**						
Publishing Industries	16.5	16.5	16.6	-0.4	-1	—	—	—	—	—	—
Telecommunications	9.5	9.5	9.5	-0.1	-0.5	—	—	—	—	—	—
Financial Activities	**141.7**	**141.9**	**141.9**	**-0.1**	**-0.1**	—	—	—	—	—	—
Finance and Insurance	109.8	109.8	109.9	0	-0.2	1,082.88	1,047.63	36.0	36.2	30.08	28.94
Credit Intermediation	37.9	38.0	37.0	-0.2	2.4	—	—	—	—	—	—
Securities, Commodity Contracts, and Other	15.8	16.1	16.3	-1.9	-3.4	—	—	—	—	—	—
Insurance Carriers and Related	53.3	53.1	53.5	0.4	-0.4	—	—	—	—	—	—
Real Estate and Rental and Leasing	31.9	32.1	31.9	-0.5	0	—	—	—	—	—	—
Professional and Business Services	**287.4**	**288.5**	**276.8**	**-0.4**	**3.8**	—	—	—	—	—	—
Professional, Scientific, and Technical Services	106.5	107.4	105.2	-0.8	1.3	—	—	—	—	—	—
Legal Services	16.2	16.2	16.0	0.5	1.6	—	—	—	—	—	—
Architectural, Engineering, and Related	15.5	15.7	15.4	-0.8	1.1	—	—	—	—	—	—
Computer Systems Design	26.7	26.7	26.0	-0.1	2.8	—	—	—	—	—	—
Management of Companies and Enterprises	69.2	69.0	67.6	0.2	2.4	—	—	—	—	—	—
Administrative and Support Services	111.7	112.1	104.1	-0.3	7.4	—	—	—	—	—	—
Employment Services	57.6	55.8	49.9	3.1	15.3	—	—	—	—	—	—
Educational and Health Services	**294.7**	**292.3**	**281.8**	**0.8**	**4.6**	—	—	—	—	—	—
Educational Services	40.6	40.0	38.0	1.3	6.6	—	—	—	—	—	—
Health Care and Social Assistance	254.1	252.3	243.7	0.7	4.3	—	—	—	—	—	—
Ambulatory Health Care	83.1	82.4	78.3	0.9	6.1	—	—	—	—	—	—
Hospitals	60.3	60.3	59.0	0.1	2.2	—	—	—	—	—	—
Nursing and Residential Care Facilities	56.8	56.5	55.2	0.4	2.9	—	—	—	—	—	—
Social Assistance	53.9	53.1	51.2	1.6	5.3	—	—	—	—	—	—
Leisure and Hospitality	**183.9**	**185.0**	**173.5**	**-0.6**	**6**	—	—	—	—	—	—
Arts, Entertainment, and Recreation	34.8	36.2	33.6	-3.8	3.6	—	—	—	—	—	—
Accommodation and Food Services	149.1	148.8	139.9	0.2	6.6	273.97	269.11	23.7	23.9	11.56	11.26
Food Services and Drinking Places	135.1	135.2	126.2	-0.1	7	267.93	255.07	23.4	23.0	11.45	11.09
Other Services	**78.9**	**76.8**	**78.2**	**2.7**	**0.8**	—	—	—	—	—	—
Repair and Maintenance	13.5	13.2	13.2	2.3	2.2	—	—	—	—	—	—
Religious, Grantmaking, Civic, Professional Organizations	44.1	43.1	44.0	2.3	0.1	—	—	—	—	—	—
Government	**223.3**	**227.4**	**214.0**	**-1.8**	**4.3**						
Federal Government	19.8	19.6	20.3	1.3	-2.3						
State Government	61.2	62.6	62.1	-2.3	-1.5						
State Government Education	35.3	36.8	36.9	-4	-4.4						
Local Government	142.3	145.2	131.6	-2	8.1						
Local Government Education	67.2	68.7	62.1	-2.1	8.2						

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

* Totals may not add because of rounding.

** Percent change based on unrounded numbers.

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

Employer Survey

Industry	Duluth-Superior MSA Jobs Aug 2013	Jobs Jul 2013	Jobs Aug 2012	% Chg. From Jul 2013	% Chg. From Aug 2012	Rochester MSA Jobs Aug 2013	Jobs Jul 2013	Jobs Aug 2012	% Chg. From Jul 2013	% Chg. From Aug 2012
TOTAL NONFARM WAGE AND SALARY	**130,168**	**130,173**	**130,335**	**0.0%**	**-0.1%**	**107,895**	**107,877**	**107,817**	**0.0%**	**0.1%**
GOODS-PRODUCING	**15,648**	**15,625**	**16,432**	**0.1**	**-4.8**	**14,247**	**14,142**	**14,682**	**0.7**	**-3.0**
Mining, Logging, and Construction	8,188	8,141	8,877	0.6	-7.8	3,671	3,647	3,656	0.7	0.4
Manufacturing	7,460	7,484	7,555	-0.3	-1.3	10,576	10,495	11,026	0.8	-4.1
SERVICE-PROVIDING	**114,520**	**114,548**	**113,903**	**0.0**	**0.5**	**93,648**	**93,735**	**93,135**	**-0.1**	**0.6**
Trade, Transportation, and Utilities	24,901	24,848	24,699	0.2	0.8	16,290	16,301	15,823	-0.1	3.0
Wholesale Trade	3,214	3,228	3,196	-0.4	0.6	2,368	2,374	2,376	-0.3	-0.3
Retail Trade	15,293	15,244	15,318	0.3	-0.2	11,617	11,601	11,214	0.1	3.6
Transportation, Warehouse, Utilities	6,394	6,376	6,185	0.3	3.4	2,305	2,326	2,233	-0.9	3.2
Information	1,283	1,316	1,341	-2.5	-4.3	1,752	1,741	1,621	0.6	8.1
Financial Activities	5,492	5,491	5,476	0.0	0.3	2,349	2,372	2,405	-1.0	-2.3
Professional and Business Services	7,748	7,821	7,933	-0.9	-2.3	5,276	5,262	5,212	0.3	1.2
Educational and Health Services	30,493	30,350	29,727	0.5	2.6	44,727	44,688	44,420	0.1	0.7
Leisure and Hospitality	15,120	15,098	14,712	0.1	2.8	9,599	9,556	9,555	0.4	0.5
Other Services	5,882	5,884	6,105	0.0	-3.7	3,668	3,721	3,595	-1.4	2.0
Government	23,601	23,740	23,910	-0.6	-1.3	9,987	10,094	10,504	-1.1	-4.9

Employer Survey

Industry	St. Cloud MSA Jobs Aug 2013	Jobs Jul 2013	Jobs Aug 2012	% Chg. From Jul 2013	% Chg. From Aug 2012	Mankato MSA Jobs Aug 2013	Jobs Jul 2013	Jobs Aug 2012	% Chg. From Jul 2013	% Chg. From Aug 2012
TOTAL NONFARM WAGE AND SALARY	**103,735**	**102,705**	**101,473**	**1.0%**	**2.2%**	**52,133**	**52,603**	**51,361**	**-0.9%**	**1.5%**
GOODS-PRODUCING	**21,981**	**22,000**	**21,020**	**-0.1**	**4.6**	**9,800**	**9,951**	**9,572**	**-1.5**	**2.4**
Mining, Logging, and Construction	6,509	6,448	5,492	0.9	18.5	--	--	--	--	--
Manufacturing	15,472	15,552	15,528	-0.5	-0.4	--	--	--	--	--
						--	--	--	--	--
SERVICE-PROVIDING	**81,754**	**80,705**	**80,453**	**1.3**	**1.6**	**42,333**	**42,652**	**41,789**	**-0.7**	**1.3**
Trade, Transportation, and Utilities	20,935	20,751	20,355	0.9	2.8	--	--	--	--	--
Wholesale Trade	4,276	4,282	4,129	-0.1	3.6	--	--	--	--	--
Retail Trade	13,248	13,076	12,928	1.3	2.5	--	--	--	--	--
Transportation, Warehouse, Utilities	3,411	3,393	3,298	0.5	3.4	--	--	--	--	--
Information	1,650	1,637	1,644	0.8	0.4	--	--	--	--	--
Financial Activities	4,410	4,463	4,461	-1.2	-1.1	--	--	--	--	--
Professional and Business Services	8,170	8,260	8,327	-1.1	-1.9	--	--	--	--	--
Educational and Health Services	19,660	18,976	19,351	3.6	1.6	--	--	--	--	--
Leisure and Hospitality	9,249	8,919	8,958	3.7	3.2	--	--	--	--	--
Other Services	3,465	3,506	3,497	-1.2	-0.9	--	--	--	--	--
Government	14,215	14,193	13,860	0.2	2.6	7,988	7,973	7,892	0.2	1.2

Employer Survey

Industry	Fargo-Moorhead MSA Jobs Aug 2013	Jobs Jul 2013	Jobs Aug 2012	% Chg. From Jul 2013	% Chg. From Aug 2012	Grand Forks-East Grand Forks MSA Jobs Aug 2013	Jobs Jul 2013	Jobs Aug 2012	% Chg. From Jul 2013	% Chg. From Aug 2012
TOTAL NONFARM WAGE AND SALARY	**132,129**	**131,390**	**127,760**	**0.6%**	**3.4%**	**54,124**	**53,967**	**53,516**	**0.3%**	**1.1%**
GOODS-PRODUCING	**20,742**	**20,618**	**18,629**	**0.6**	**11.3**	**7,061**	**7,139**	**6,875**	**-1.1**	**2.7**
Mining, Logging, and Construction	10,365	10,246	8,301	1.2	24.9	3,522	3,612	3,298	-2.5	6.8
Manufacturing	10,377	10,372	10,328	0.1	0.5	3,539	3,527	3,577	0.3	-1.1
SERVICE-PROVIDING	**111,387**	**110,772**	**109,131**	**0.6**	**2.1**	**47,063**	**46,828**	**46,641**	**0.5**	**0.9**
Trade, Transportation, and Utilities	29,096	28,868	28,107	0.8	3.5	12,454	12,356	11,970	0.8	4.0
Wholesale Trade	8,701	8,802	8,498	-1.2	2.4	2,077	2,073	2,029	0.2	2.4
Retail Trade	15,508	15,220	14,871	1.9	4.3	8,260	8,224	7,964	0.4	3.7
Transportation, Warehouse, Utilities	4,887	4,846	4,738	0.9	3.1	2,117	2,059	1,977	2.8	7.1
Information	3,261	3,268	3,262	-0.2	0.0	605	608	620	-0.5	-2.4
Financial Activities	9,443	9,428	9,143	0.2	3.3	1,658	1,660	1,660	-0.1	-0.1
Professional and Business Services	16,059	15,965	15,439	0.6	4.0	2,911	2,856	3,205	1.9	-9.2
Educational and Health Services	20,874	20,913	20,265	-0.2	3.0	9,726	9,678	9,527	0.5	2.1
Leisure and Hospitality	12,991	12,936	13,212	0.4	-1.7	5,960	5,837	5,932	2.1	0.5
Other Services	5,018	4,996	5,044	0.4	-0.5	1,931	2,004	1,910	-3.6	1.1
Government	14,645	14,398	14,659	1.7	-0.1	11,818	11,829	11,817	-0.1	0.0

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

Minnesota Economic Indicators

Highlights

The **Minnesota Index a**dvanced for the 45th straight month in August climbing 0.4 percent. The only negative component of the index last month was slipping average weekly manufacturing hours. Wage and salary employment surged in August, and the state's jobless rate dip another 0.1 percentage point. The U.S index increased 0.2 percent last month. Minnesota's index has been racing ahead of the national index for the last four months suggesting that Minnesota's economy has been expanding at a faster rate than the U.S. economy since May.

Minnesota's index in August was 3.7 percent higher than a year ago while the U.S. index was 2.9 percent higher than last year. The 3.7 over-the-year reading suggested that Minnesota's GDP expanded by 3.7 percent last month. This is the fastest monthly economic growth since July 2000.

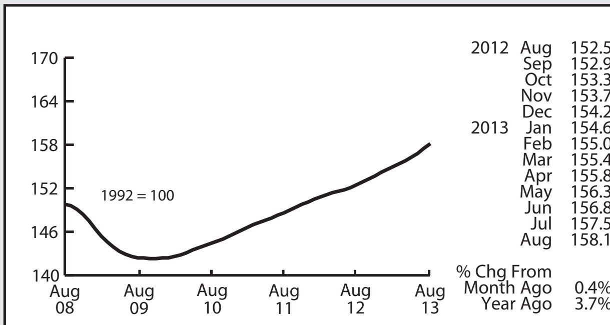
Minnesota's **Wage and Salary Employment** added a robust 12,200 jobs in August, the largest monthly gain since January. Private jobs were up 12,600, the largest monthly jump in private employment since April 2005. The job report wasn't all roses though as manufacturing employment declined by 3,400 jobs, the steepest decline since May 2009. Payroll numbers also slipped in Professional and Business Services and in Information. Hiring was strongest in Retail, Transportation, and Utilities, in Educational and Health Services, and in Other Services.

Over-the-year job growth using unadjusted employment numbers slipped a bit in Minnesota to 2.3 percent in August. The national growth was 1.7 percent over the same period. Minnesota's job growth for the year is currently headed for 1.9 percent while the U.S. rate, if the current trend holds, is headed for a 1.7 percent annual average job growth for 2013. A 1.9 percent annual average job growth for the state would be the fastest pace since 2000.

Minnesota's adjusted online **Help-Wanted Ads** rose 1.9 percent in August to the highest volume since March. Minnesota's online help-wanted ad level, however, has been lower compared to a year ago for five months in a row. Fewer help-wanted ads suggest that labor demand has dipped compared to last year, but job growth has been significantly stronger over the summer this year than last year. The help-wanted online decline is inconsistent with the recently released Job Vacancy Survey, which reported job vacancies up 17 percent in the second quarter of 2013 compared to 2012.

Minnesota's **Purchasing Managers' Index (PMI)** spiked to 59.0 in August, advancing to a 15-month high. August's strong reading implies that Minnesota's economy has accelerated over the last few months and should continue at a robust pace through the rest of the year. The strong PMI reading, however, is inconsistent with recent job cutbacks in manufacturing. The employment component of the PMI has been above 50 for 10 consecutive months suggesting that manufacturing hiring should be rising, not tailing off.

Adjusted **Manufacturing Hours** stumbled in August, falling off to 41.2 hours. Factory hours remain strong, however, exceeding 41 hours for six straight months. That is the best showing in over two years. **Manufacturing Earnings** rose slightly to $826.48 last month. Factory paychecks have been running around 3 percent higher than last year, after adjusting for inflation, for the last six months. This is the biggest real gain in factory paychecks since the last half of 2010.



Source: The Federal Reserve Bank of Philadelphia, 2013

Minnesota Index

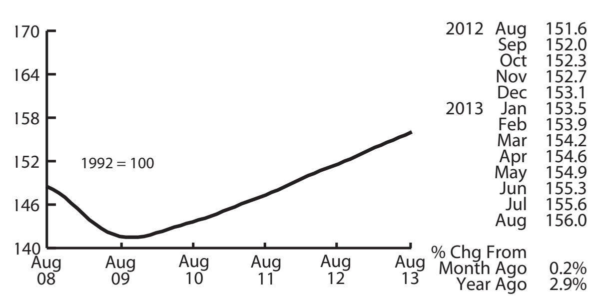
The **Minnesota Leading Index** continues to run red hot, coming in at 2.13 in August. The index has been above 2.0 for four months in a row. That hasn't happened since 1997 during the boom years. The 2.13 reading suggests that Minnesota's economy will expand by more than 2 percent over the next six months.

Adjusted **Residential Building Permits** climbed for the second month in a row, reaching a 2013 high of 1,623. Minnesota's housing market continues to bounce back, but the rebound road continues to be bumpy. Home building permits have average 50 percent more over the last six months compared to a year ago. Other housing statistics also continue to show improvement from a year ago. All of these signs point toward homebuilding activity continuing to gain steam over the next six months.

After declining in the previous three months, Adjusted **Initial Claims for Unemployment Benefits (UB)** inched up in August, rising 0.3 percent. The number of Minnesotans filing new claims for unemployment, however, continues to run close to a 13-year low. Initial claims are on track to average around 21,600 for the year, the lowest level since 2000. Low levels of initial claims usually indicate low layoff rates which traditionally correlate with robust hiring.

by Dave Senf

United States Index

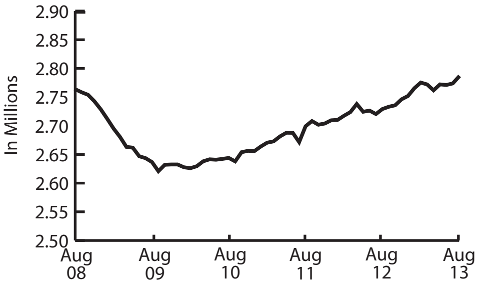


Source: The Federal Reserve Bank of Philadelphia, 2013.

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	Mar	2.7720
	Apr	2.7618
	May	2.7721
	Jun	2.7711
	Jul	2.7738
	Aug	2.7860

% Chg From Month Ago 0.4%

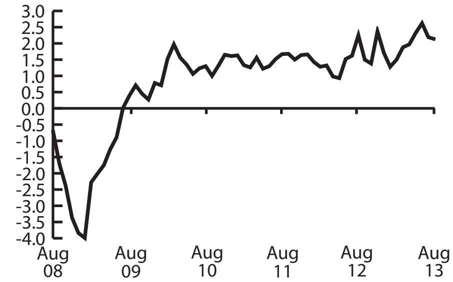
unadjusted

2012	Aug	2.7439
2013	Aug	2.8070

% Chg From Year Ago 2.3%

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

Minnesota Leading Index

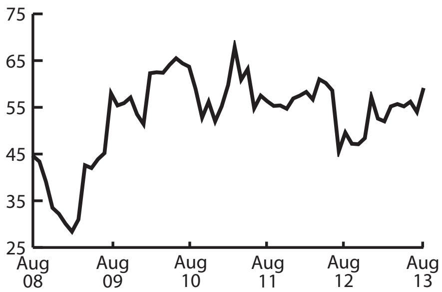


2012	Aug	2.25
	Sep	1.50
	Oct	1.38
	Nov	2.37
	Dec	1.71
2013	Jan	1.28
	Feb	1.50
	Mar	1.88
	Apr	1.97
	May	2.32
	Jun	2.62
	Jul	2.19
	Aug	2.13

% Chg From Month Ago -2.9%
Year Ago -5.6%

Source: The Federal Reserve Bank of Philadelphia, 2013

Purchasing Managers' Index

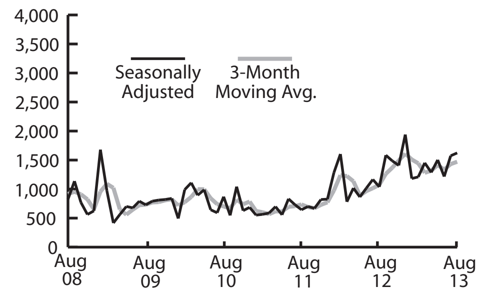


2012	Aug	49.6
	Sep	47.2
	Oct	47.1
	Nov	48.4
	Dec	57.2
2013	Jan	52.6
	Feb	52.0
	Mar	55.2
	Apr	55.7
	May	55.2
	Jun	56.2
	Jul	54.0
	Aug	59.0

% Chg From Month Ago 9.3%
Year Ago 19.0%

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

Residential Building Permits



seasonally adjusted

2013	Mar	1,452
	Apr	1,288
	May	1,503
	Jun	1,216
	Jul	1,574
	Aug	1,623

% Chg From Month Ago 3.1%

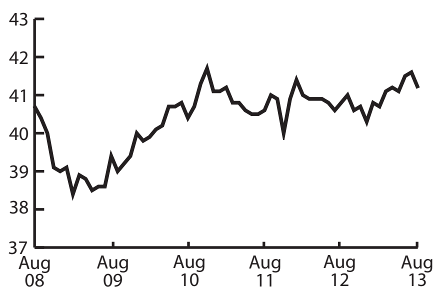
unadjusted

2012	Aug	1,201
2013	Aug	1,846

% Chg From Year Ago 53.7%

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

Average Weekly Manufacturing Hours



seasonally adjusted

2013	Mar	41.1
	Apr	41.2
	May	41.1
	Jun	41.5
	Jul	41.6
	Aug	41.2

% Chg From Month Ago -0.9%

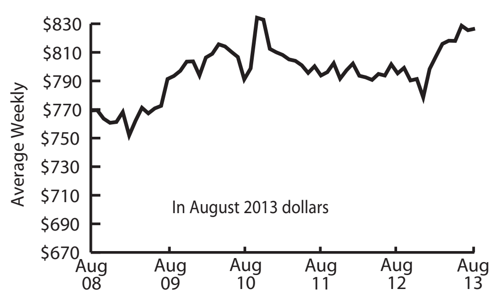
unadjusted

2012	Aug	41.0
2013	Aug	41.5

% Chg From Year Ago 1.2%

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

Manufacturing Earnings



seasonally adjusted

2013	Mar	815.94
	Apr	818.14
	May	818.00
	Jun	828.67
	Jul	825.50
	Aug	826.48

% Chg From Month Ago 0.1%

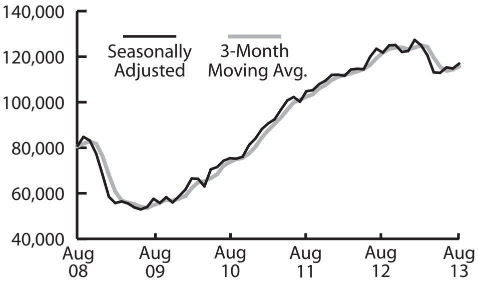
unadjusted

2012	Aug	791.30
2013	Aug	822.12

% Chg From Year Ago 3.9%

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

Online Help-Wanted Advertising

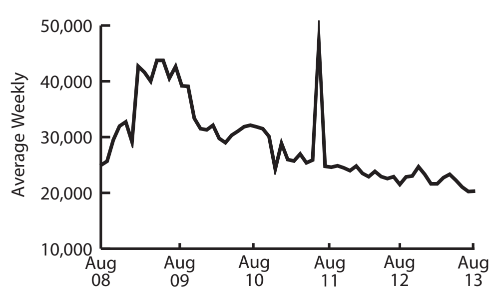


2012	Aug	121,796
	Sep	124,973
	Oct	125,104
	Nov	122,066
	Dec	122,500
2013	Jan	127,366
	Feb	125,028
	Mar	120,633
	Apr	113,100
	May	112,900
	Jun	115,300
	Jul	114,800
	Aug	117,000

% Chg From Month Ago 1.9%
Year Ago -3.9%

Source: The Conference Board Inc., 2013.

Initial UB Claimants



seasonally adjusted

2013	Mar	22,728
	Apr	23,326
	May	22,259
	Jun	21,054
	Jul	20,242
	Aug	20,311

% Chg From Month Ago 0.3%

unadjusted

2012	Aug	16,278
2013	Aug	14,290

% Chg From Year Ago -12.2%

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

Minnesota Employment Review

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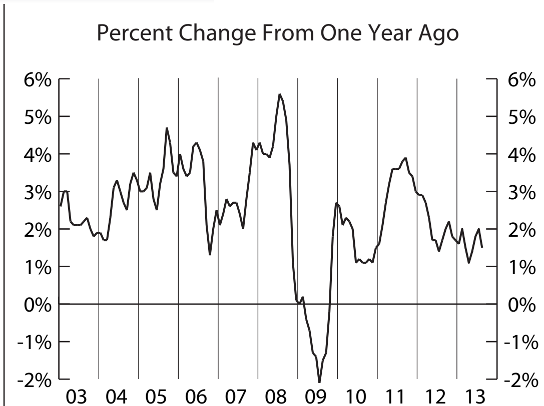
U.S. Consumer Price Index
for All Urban Consumers (CPI-U)

On a seasonally adjusted basis the August CPI-U for all items increased 0.1 percent over the month. The index increased 1.5 percent from August 2012, not seasonally adjusted. The index for Food increased 0.1 percent over the month; the index for Energy fell 0.3 percent. All Items less Food and Energy increased 0.1 percent over the month, as well, with subcategories mostly similarly stable. Medical care commodities (up 0.4 percent), Transportation services (down 0.5 percent), and Medical care services (up 0.7 percent) were exceptions.

The official BLS news release is available here: **www.bls.gov/news.release/pdf/cpi.pdf**



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

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What's Going On?

Minnesota Manufacturers Week Set for Oct. 20-26

Tours of manufacturing facilities, speakers and educational activities are planned in recognition of Minnesota Manufacturers Week, October 20-26. The annual event is designed to educate Minnesotans about the role manufacturing plays in the state economy and to highlight employment opportunities.

Manufacturing accounts for one in nine jobs in Minnesota. About 300,000 people work in manufacturing, primarily in computer and electronic products, foods, fabricated metal products and machinery, according to Current Employment Statistics. The average manufacturing position in the state pays $56,328 a year.

Sponsors are DEED, Minnesota Precision Manufacturing Association, Dream It, Do It and the Minnesota Chamber of Commerce.

More details about Minnesota Manufacturers Week are available at: **www.tinyurl.com/MinnesotaManufacturersWeek**.

Positively Minnesota
Department of Employment and Economic Development

Who's Counting?

Tracking Minnesota's Temporary, Self-Employed, and Contract Workforce

Several programs exist to measure jobs in Minnesota, and each defines jobs and employment in its own way. However, not everyone who is working is counted in these programs or at a level of industrial or occupational detail that allows us to show changes in hiring trends that may be of interest to job seekers and employment counselors. For some job seekers opportunities at temporary staffing agencies or contract work have become an increasingly viable route for getting them back to work. Self-employment may be a natural extension of the professional skill set and expertise of job seekers in career transition or for students being trained in occupational fields where self-employment or contract work is high.

So, how does labor market data count jobs in staffing agencies, contract work, and self-employment?

Counting Jobs

State labor market data collections include many sources for counting jobs:

First, the Current Employment Statistics (CES) is a monthly survey of nonfarm businesses for estimating state and Metropolitan Statistics Area (MSA) industry employment, hours and earnings. The CES program is a federal-state cooperative program between the U.S. Bureau of Labor Statistics and state agencies. This program is the largest survey of its kind, based on a sample of 400,000 businesses nationwide and 5,900 businesses in Minnesota. Jobs excluded from CES include:

- Proprietors and the unincorporated self-employed.
- Agricultural production workers except logging
- Domestic workers
- Military personnel
- Unpaid family workers or volunteers

Second, the Quarterly Census of Employment and Wages (QCEW) is a count of all establishments and employment covered under the state's Unemployment Insurance (UI) Program. It's estimated that the UI program covers about 97 percent of Minnesota's *wage and salaried employment*. Workers and jobs excluded from the QCEW include, but are not limited to:

- Proprietors and the self-employed
- Members of the Armed Forces
- Railroad workers, who are covered under the Railroad Unemployment Insurance Act
- Unpaid family farm workers
- Full-time students working for their schools
- Elected government officials and major policy-making or advisory officials
- Some clergy/religious workers
- Insurance and real estate salespeople, who work only on a commission basis

Other programs in the Labor Market Information (LMI) Office further measure Minnesota jobs and employment, such as the Local Area Unemployment Statistics (LAUS) program and the 10-year employment projections. Each defines jobs and employment differently, yielding a range of estimates as evident in Figure 1. While the job and employment figures in these LMI programs follow a similar trend line, the difference in job and employment estimates among programs can vary by nearly 300,000 between the highest and lowest estimates.

One national estimate of jobs from the Bureau of Economic Analysis (BEA)'s annual State Personal Income and Employment series makes adjustments to account for employment and wages not covered by state Unemployment Insurance (UI) programs. Therefore, the BEA estimates of total employment are nearly 33 percent higher than the QCEW job estimates in 2011.

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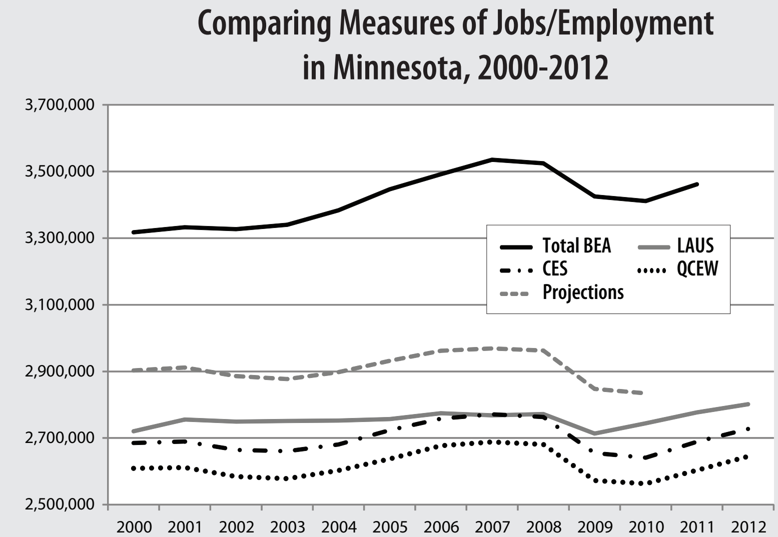
Department of Employment and Economic Development

Figure 1



Source: Bureau of Economic Analysis and Minnesota Department of Employment and Economic Development

Counting Temporary Workers

The Employment Services sector (NAICS 5613), which includes employment placement and temporary staffing agencies, is often a leading indicator of economic trends.[1] Firms experiencing downturns in business demand prior to a recession may lay off temp workers before cutting permanent staff. As business conditions improve, temp agency employment should increase as firms slowly ramp up production without adding to permanent payroll. While this industry's employment level does not necessarily predict a recession or its recovery, the industry has shown itself to rise and fall with the larger labor market (Figure 2).

Rapid growth in employment staffing agencies has being driven by structural changes in the economy. Part of the growth is from the current business climate, but the concept of "just-in-time labor" allows firms to use labor when it is needed without paying for the compensation costs associated with full-time workers. People who work for temporary agencies are counted in both CES estimates and QCEW counts of jobs. In both programs, jobs reported by larger employment service firms are usually reported to the correct industry, but smaller firms' data is all too frequently captured under the larger Employment Services sector. So the data do not confirm if the rise of temp jobs is necessarily related to an increase in work in a specific industry.

Annual counts of job openings in employment service and temporary staffing agency seem to support this analysis. MinnesotaWorks.net, the state's no-fee job bank for employers and job seekers, showed a large number of posted jobs openings (109,740) in employment placement agencies, executive search services, and temporary help services sectors.[2] In fact 42.4 percent of all jobs posted on MinnesotaWorks.net were in the Employer Services sector (NAICS 5613). By comparison, Minnesota employers posted 45,470 employer service-related openings in 2010, during the early days of the recession's recovery. The Employment Services sector accounted for 35.5 percent of all posted openings.[3]

Figure 3 shows the national occupational distribution of jobs in the Employment Services sector in 2012. While jobs in this sector also include the administrative, business, financial, human resource, and managerial positions in staffing and temporary help agencies, the high concentration of production and of transportation and material moving occupations suggests the kinds of workers that are being placed by staffing firms.

A closer look at the detailed occupations employed in the Employment Services sector reveals the following top 10 professions with the highest concentration:

- Laborers and freight, stock and material movers, hand
- Team assemblers
- Office clerks, general
- Helpers, production workers
- Packers and packagers, hand
- Customer service representatives
- Assemblers and fabricators, all other
- Construction laborers
- Secretaries and administrative assistants
- Human resources specialists

With over-the-year jobs in the Employment Services sector growing at 13.5 percent in July, compared to the 2.4 percent private sector job growth in Minnesota, it's clear that job seekers are finding opportunities in this industry.

Counting Self-Employed and Contract Workers

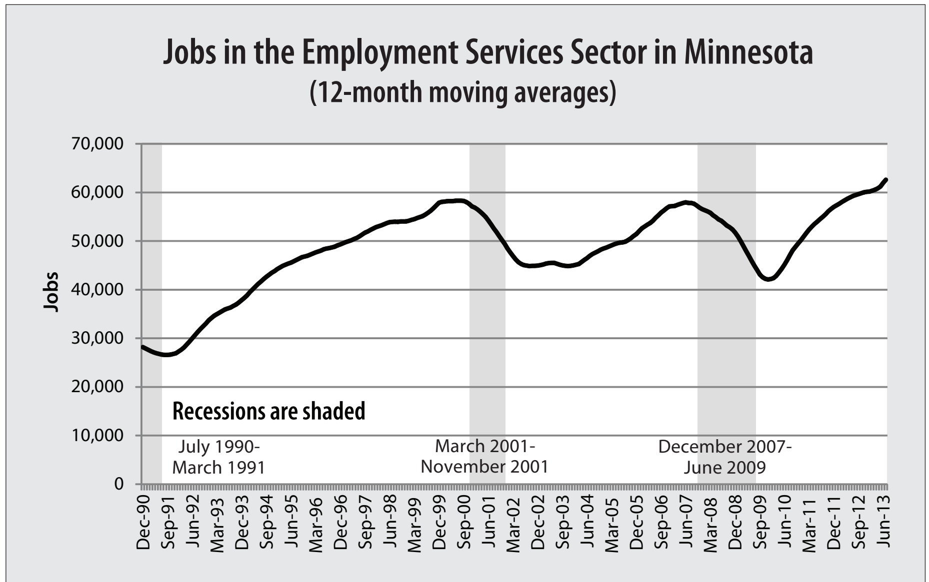
While the definition of jobs varies slightly between the data sets, they do not include the self-employed or contract workers who are not viewed as an employee of the firm. One of the best sources of data is the U.S. Census Bureau's Nonemployer Statistics program. A nonemployer business is one that has no paid employees, has annual business receipts of $1,000 or more ($1 or more in the Construction industry), and is subject to federal income taxes. The source of this data is primarily from the annual or quarterly business income tax returns filed with the Internal Revenue Service (IRS) and maintained in the Census Bureau's Business Register. Independent contractors receiving a 1099 tax form that must be filed with the Internal Revenue Services (IRS) are included in these calculations.

According to the U.S. Census Bureau "most nonemployers are self-employed individuals operating very small unincorporated businesses, which may or may not be the owner's principal source of income." These firms are excluded from most other business statistics, like QCEW which tracks wage and salaried jobs and employers who pay Unemployment Insurance taxes. Adding nonemployers into the count of QCEW business establishments and jobs would reveal that nonemployers account for 70.2 percent of all businesses in Minnesota and about 13.0 percent of total jobs, if each self-employed individual counts as one job in the total number of jobs data from the U.S. Census Bureau.[4]

With Nonemployer Statistics dating back to 2002, we can measure changes in the number of nonemployer firms against the jobs tracked by the QCEW program and covered by unemployment insurance. Figure 4 shows the changes in Minnesota employment between 2002 and 2011. The state suffered noticeable employment declines during the Great Recession, which officially began in December 2007. While covered jobs declined less than one half of one percent between 2007 and 2008, all the 2007 gains in self-employment businesses disappeared in 2008.

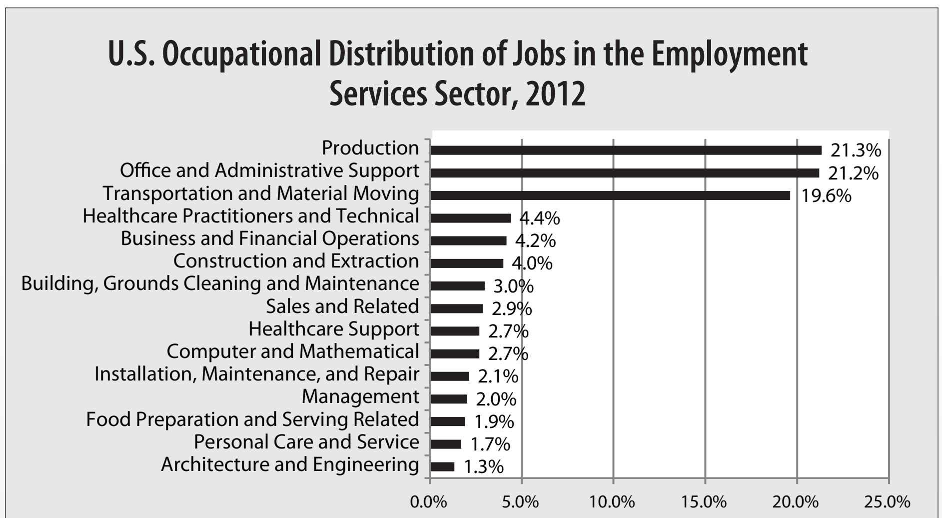
Trends over the 2007 to 2009 recession show a different picture. While the number of covered jobs fell by 4.3 percent between 2007 and 2009, the number of self-employed declined by almost half that rate (2.3 percent). Job growth rebounded between 2010 and 2011 for covered jobs (1.6 percent) and self-employment (1.5 percent) at nearly the same rate. The release of the 2012 Nonemployment Statistics in May 2014 will help to determine if the growth trends remain in tandem or if there has been further expansion in nonemployer businesses.

Figure 2



Source: DEED, Labor Market Information Office, Current Employment Statistics

Figure 3



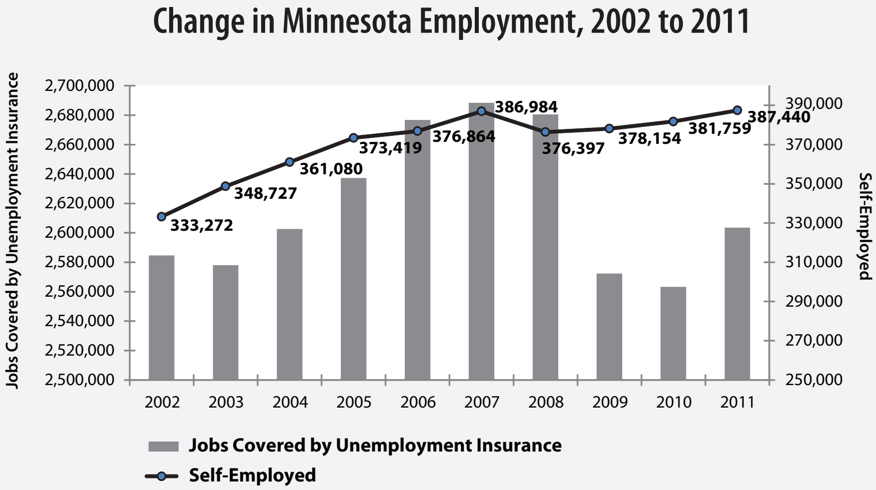
Note: Occupational groups were not included if 1) no data were available or 2) jobs accounted for less than one percent of occupational employment.

Source: Bureau of Labor Statistics, National Industry-Specific Occupational Employment and Wage Estimates, May 2012

The largest industry for self-employment was professional, scientific, and technical services, accounting for 15.1 percent of all nonemployer establishments in Minnesota in 2011. This industry sector includes management and technical consulting, accounting, tax preparation, bookkeeping, and payroll services. Entry into these industries appears relatively easy, as the sector added more than 1,000 nonemployer businesses between 2010 and 2011 (Table 1).

Other services, which boasts the second largest number of nonemployer businesses in Minnesota and the sector

Figure 4



Source: DEED, Labor Market Information Office, Quarterly Census of Employment & Wages, U.S. Census Bureau, Nonemployer Statistics program

Table 1

Nonemployer Statistics in Minnesota

	Firms	2011 Percent of Firms	Receipts ($1,000)	2010 to 2011 Change in Firms
Total for All Sectors	**387,440**	**100.0%**	**16,370,424**	**5,681**
Agriculture	5,149	1.3%	193,964	217
Mining	168	0.0%	10,022	-4
Utilities	342	0.1%	26,255	2
Construction	41,860	10.8%	2,200,671	-325
Manufacturing	7,384	1.9%	274,199	281
Wholesale Trade	6,731	1.7%	498,791	-60
Retail Trade	36,846	9.5%	1,286,409	292
Transportation and Warehousing	19,272	5.0%	1,407,419	552
Information	5,338	1.4%	146,665	69
Finance and Insurance	13,884	3.6%	915,583	63
Real Estate and Rental and Leasing	39,819	10.3%	3,918,153	-63
Professional, Scientific, and Technical Services	58,548	15.1%	2,041,313	1,011
Administrative and Support Services	25,652	6.6%	548,639	643
Educational Services	11,276	2.9%	136,878	320
Health Care and Social Assistance	33,709	8.7%	887,996	-43
Arts, Entertainment, and Recreation	26,153	6.8%	419,041	687
Accommodation and Food Services	3,987	1.0%	188,785	95
Other Services	51,322	13.2%	1,269,641	1,944

Source: U.S. Census Bureau, Nonemployer Statistics program

that added the largest number of new net nonemployer businesses in 2011, includes:

- Personal care services (hair salons, barber shops, and nail and skin care services)
- Automotive repair and maintenance shops
- Personal and household goods repair and maintenance
- Pet care services

While five industries saw a contraction in the number of net nonemployer businesses, construction had the largest number (325) between 2010 and 2011. Specialty trade contractors, like framers, roofers, finish carpenters, plumbers, and electricians, often make up a large number of nonemployer firms in this sector. Because the number of covered construction jobs decreased significantly during the recession, it's reasonable to assume that some workers transitioned into self-employment. By 2011 covered construction jobs increased by 3,440 on an annual average basis and some self-employed workers may have transitioned back into working as an employee for another company.

While the number of jobs for temporary, contract, and the self-employed are tracked in different ways and by various means, they represent an important component of the state's economy and a source of opportunities for job seekers.

by Rachel Vilsack
Labor Market Information Office
Minnesota Department of Employment and Economic Development

[1]The Employment Services sector includes 1) employment placement agencies primarily engaged in listing employment vacancies and in referring or placing applicants for employment; 2) temporary help services primarily engaged in supplying workers to clients' businesses for limited periods of time to supplement the working force of the client; and 3) professional employer organizations primarily engaged in providing human resources and human resource management services to client businesses.

[2]MinnesotaWorks.net job postings counts are available for both employment services and temporary staffing firms. Openings in temp agencies outnumber employment service firms by a magnitude of 2.

[3]Minnesota's semi-annual Job Vacancy Survey excludes firms in the Employment Services sector from its sampling procedure.

[4]These percentages represent the sum of total covered jobs in 2011 from the Quarterly Census of Employment and Wages and the sum of nonemployers in 2011 from the U.S. Census Bureau Nonemployer Statistics program.

Photo courtesy Minnesota State Fair

The Economic Impact of Minnesota's State Fair

Summertime in Minnesota is an endless string of festivals and events. Every county hosts at least one, and within the metro, often there are choices every weekend. Estimates put the number of festivals in the state each year somewhere between 600 and 1,500. Many of these festivals bring little or no money into the local economy. Others may bring in larger sums, from $4.2 million (Irish Fair of Minnesota) to $20 million (Renaissance Festival) or even more.[1] Many smaller festivals likely bring in little money and are held simply for the entertainment value. The biggest festival of them all, though, is the State Fair. State Fair attendance and budgets are well-documented for the legislature, but estimates of the economic impacts beyond fair management are less well-documented.

The Minnesota State Fair brings more than 1.7 million people a year into Saint Paul for food, fun, and fresh air. The traditions, the food, the newest and most exciting displays are touted in the rush to get people to the party. But there's another side of the fair – for many people, it's a livelihood more than an amusement. Although the fair operators charge admission and use those funds for facilities maintenance and security, the vendors are independent businesses. Rides, food, products, and music are all sold by independent operators. Consultants and services are consumed by exhibitors and competitors. Even long-established businesses get a seasonal August uptick as they adapt to provide parking, hotels, and food or beverages to fair attendees.

Because this is short-term (only 12 days of the year), and because it's so consistent from year to year, the economic value of the State Fair to Saint Paul and nearby areas is often overlooked. In 2011 the State Fair itself brought in $41,351,000 in revenue from Ticket Sales (including Carnival, Grandstand, Gate and Parking), Activities (Campgrounds, Entertainment, Competitions, Sales, and other), and Other (Non-fair events, sponsorships, licenses, utilities, and other categories).[2] Businesses treat it as a marketing opportunity or may make a profit if they sell products at the event. Government agencies ramp up security, transportation, and parks maintenance to support the crowds in and near the fairgrounds, often paying workers overtime and keeping or hiring seasonal workers. However, vendor revenue is not public information, and the benefits to nearby establishments are even harder to quantify. Although the fair is short-term, the amount of money that changes hands in fair-related transactions is definitely a boon to the area and the people and to businesses involved.

Background

The Minnesota State Agricultural Society (MSAS) manages the fairgrounds and the fair. They also coordinate other events and the rental and maintenance of the facilities. Although accountable to the State as a quasi-state entity, MSAS receives no public subsidy — essentially, income generated by the fair and fairgrounds pays the cost of running the event. Donations to the separate and private State Fair Foundation are often used for improvements as well.

In 2011, the most recent year for which the full financial report was available at time of writing, the fair brought in 1,769,872 visitors and revenue of $41.4 million. Expenses totaled $39.6 million.[3] The scale of the event is massive. Over the course of a few months or weeks, money changes hands at a rapid pace. All that money is spent on goods and services, largely from local entities. Many service providers have ongoing or repeat contracts that give them a measure of financial stability. Some of that money is spent toward payroll — permanent jobs for people who work for MSAS itself or whose jobs are substantially dedicated to fair activities by outside entities. Those people live and work locally, spending toward the local economy and acting as economic anchors of a sort.

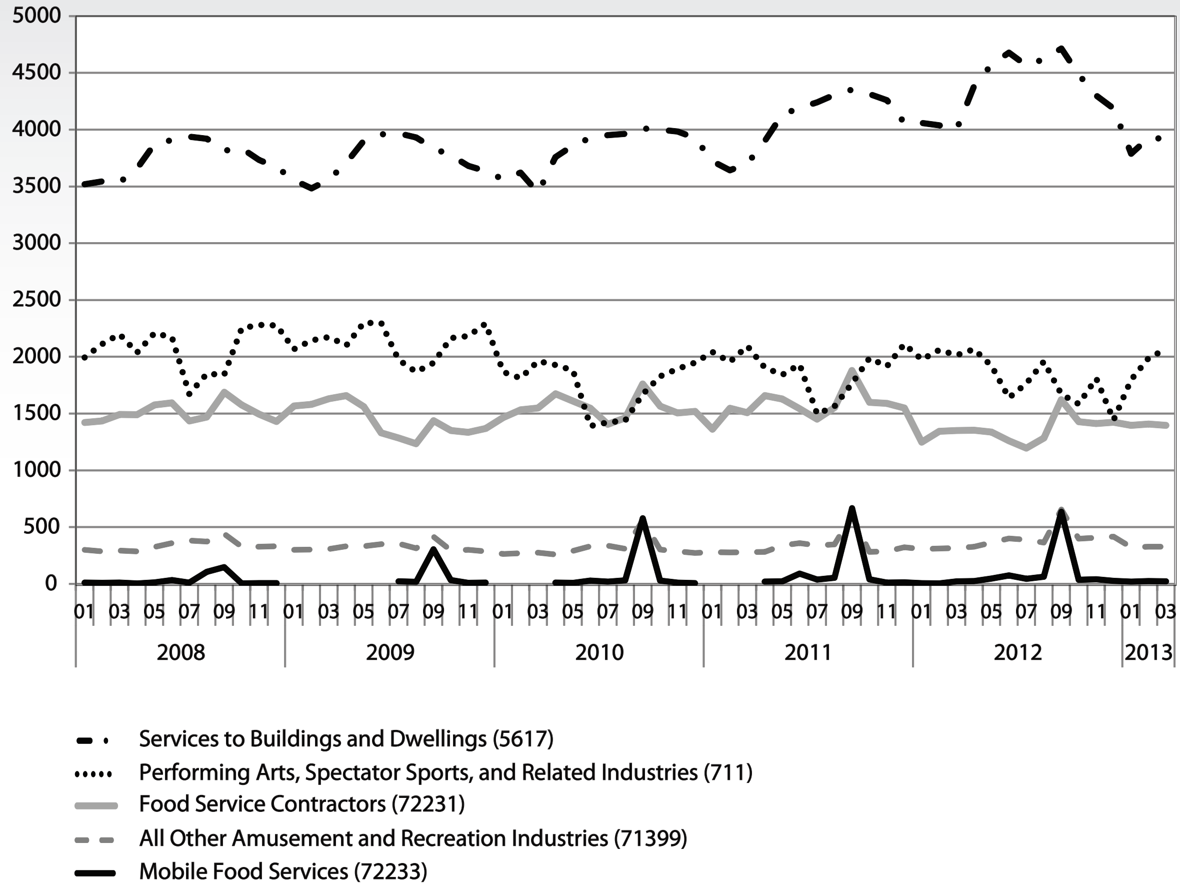
A 2003 report commissioned by MSAS from a private consulting firm[4] attempted to quantify the economic impacts of the fair using RIMS II multipliers produced by the U.S. Bureau of Economic Analysis and the U.S. Department of Commerce. The idea behind this method is to see how dollars spent or jobs created in one industry ripple through the economy. While now somewhat dated, the report indicated that annual fair activities had $44.2 million in expenditure impacts, largely on concession and rides, $14.1 million in earnings impacts, and created 1,980 jobs. Including operations of MSAS and the non-fair events, 5,550 jobs were created.

That report, though, limits itself to the effects of MSAS. Much of the State Fair's impact never goes through them. Private vendors pay fees to be there, but may not report total revenues. Hotels, taxis, and bus tours have no affiliation. Marketing campaigns by large companies and politicians may be costly and expenditure-heavy, but little of it goes to the fair itself. Groups and associations like 4H and schools make the fair a major part of their focus, with participants putting energy and expense in beforehand and often far away to showcase at the event. Even fairgoers who dish out for sunscreen and new walking shoes are inspired to spend where they otherwise wouldn't and are contributing to economic activity without being quantified as a fair activity. The attractions of the fair and its broad attendance inspire much more economic activity than can be easily quantified by a single entity.

Estimated Impacts of MSAS Activities - 2003

		Initial Impacts	Induced Impacts	Total Impacts
Expenditures	Minnesota State Agricultural Society Operations	$28,000,000	$45,000,000	$73,000,000
	Annual Fair Impacts			
	Local concessionaire and ride/game operators	$15,200,000	$16,800,000	$32,000,000
	Non-local concessionaires, ride and game operators and commercial exhibitors	$4,100,000	$3,700,000	$7,800,000
	Non-local competitive livestock exhibitors	$2,100,000	$2,300,000	$4,400,000
	Total Fair Impacts, excluding non-fair events	$49,400,000	$67,800,000	$117,200,000
Employment	Operations	2,460	450	2,910
	Annual Fair Activities	1,210	770	1,980
	Annual Non-Fair Activities	80	580	660
	Total employment impacts	3,750	1,800	5,550

Employment in Fair-Related Industries, Ramsey County, 2008-2013



While mostly the fair brings forth images of food and rides and entertainment, the industries that it draws upon are much more varied than that. Transit adapts to the increased traffic – buses run more frequently, and parking for pay and shuttle services become industries overnight. Security and police ramp up. Waste hauling and garbage services are expanded. Landscaping and contractors are hired to ensure the fairgrounds are maintained and to build temporary exhibits. Marketing and advertising are expanded, both because of the expense of advertising the fair itself, and because outside entities take the opportunity to market to so many people all in one place at one time. Many people also travel for the fair – their accommodations and expense on gas and food away from home help the local economy.

Employment Numbers

While we can track seasonal trends in the industries that are likely to be impacted by State Fair activities, we face two major problems when isolating fair-related growth. First, our data products focus on employment. While we have wage data, it is reported quarterly, so brief spikes are very difficult to identify. Since in many of these industries existing staff may work many more hours before the company is compelled to hire, employment alone is often a weak indicator of how busy or lucrative a business is in the short term. The second problem is that employment is reported for the pay period containing the 12th of the month. While we have monthly data, any hiring that occurs exclusively for the last two weeks of August, the general time frame of the fair, would likely not be reported as a part of our existing data products. We can only capture increases that start before the fair or continue after, which likely decreases the accuracy.

Additionally, tracking those benefits to the local economy can be tricky. This agency has no way of delving into expenditures or sales taxes charged because our focus is on employment. However, the term of the fair makes that challenging. Payroll employment is unlikely to reflect the full impact of temporary hires because the fair doesn't fall during our reference week, the week including the 12th of the month. Even without the actual dates of the fair included in our sample, hiring in some industries shows a clear increase. Because food vendors and other related industries often have summer activities, this is a seasonal increase spurred by many events, but is likely inflated by the reliability/scale of the State Fair, which allows vendors to bring on more workers and schedule hours more flexibly for events before the fair.

Additionally, few businesses are permanently at the fairgrounds, making it hard to isolate where their employment is reported. For the purposes of this investigation, Ramsey County was the area of focus, but that likely misses at least some employment that is related to the fair.

There is nonetheless a notable increase in employment in some industries, particularly mobile food vendors. Most others see some increase around that time, but it may simply be their typical seasonal pattern. Services to Buildings and Dwellings, for example, the category that includes landscaping services, definitely increases hiring in August and September, but autumn maintenance and the full realization of accrued summer gains could also be responsible for this employment growth.

Photo: Judy Parker

A Broader View

Other summer events have significant attendance numbers — in 2010 Tall Ships brought 250,000 people into Duluth. Grandma's Marathon brings in about 10,000 runners every year, and more spectators and vendors. In the metro the Renaissance Festival, which runs for much longer, had 303,000 attending in 2012. In 2011 the Minneapolis Aquatennial counted 400,000 in attendance, although that may pull in more local people. WE Fest had 47,000 attendees over only three days.[5] In Saint Paul the Hmong Freedom Fest brings people from all over the country, and the Irish Fair attracts 80,000 to 100,000 people. Data for these events are even harder to quantify: They're less consistent and often shorter, they coincide with or make up the summer tourist season, and their lack of government ties leaves even more of their financial operations a mystery. While some release estimates of the amount of money spent, there is no consistency in how those data are collected or compiled, and thus are not comparable. Likely many of the same vendors and contractors work for several of these events and experience with one has been leveraged to gain work at another.

Major events, besides being an attraction for residents, likely provide a revenue stream that expands certain industries in the state. While there may not be much short-term hiring, the money spent by the State Fair and its consistency — returning every year, reliable dates, habitually large expenditures — makes the presence of higher-quality service providers viable and in turn benefits other consumers of those services.

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[1]Greder, Andy and Ann Harrington. Twin Cities Business, "What do 10,000 Festivals Add to the MN Economy?" May 23, 2013.

[2]Report to the Minnesota State Legislature. "Minnesota State Fair, 2011 Annual Report". September 2012. **http://archive.leg.state.mn.us/docs/2012/mandated/120688.pdf**

[3]Report to the Minnesota State Legislature. "Minnesota State Fair, 2011 Annual Report". September 2012. **http://archive.leg.state.mn.us/docs/2012/mandated/120688.pdf**

[4]Markin Consulting. "Report on the Economic Impacts of The Minnesota State Agricultural Society." December, 2003. **www.markinconsulting.com/MSF%20Economic%20Impact%20Final%20Report.pdf**

[5]Greder, Andy and Ann Harrington. Twin Cities Business, "What do 10,000 Festivals Add to the MN Economy?" May 23, 2013.