

Demographic Data Report

2nd Generation Southeast Landscape Plan

MFRC Southeast Regional Landscape Committee

February 2014



Minnesota Forest Resources Council (MFRC)

Landscape Technical Document #LT0214c

©Copyright 2014, Minnesota Forest Resources Council

This document is available online at http://mn.gov/frc/initiatives_llm_committees_southeast.html

Information about the Minnesota Forest Resources Council and the Landscape Program can be found at www.frc.state.mn.us

Equal opportunity to participate in and benefit from Minnesota Forest Resources Council programs is available to all individuals regardless of race, color, creed, religion, national origin, sex, marital status, status with regard to public assistance, age, sexual orientation, or disability. Discrimination inquiries should be sent to the Minnesota Forest Resources Council, 1530 Cleveland Ave. N, St. Paul, MN 55108; or the Equal Opportunity Office, Department of the Interior, Washington, D.C. 20240.

This information is available in an alternative format upon request.

This report was prepared for the **MFRC Southeast Regional Landscape Committee**.

Report prepared by: Amanda Kueper and Michael Lynch (MFRC Staff).

GIS analysis and map production: Jeff Reinhart (MFRC Staff)

Please cite this document as:

Minnesota Forest Resource Council. 2014. *Demographic Data Report: 2nd Generation Southeast Landscape Plan*. Landscape Program Document #LT0214c. Minnesota Forest Resource Council, St. Paul, Minnesota. Available online at http://mn.gov/frc/initiatives_llm_committees_southeast.html



Table of Contents

| | |
|---|-----------|
| Table of Contents | 3 |
| Table of Tables | 4 |
| Table of Figures..... | 5 |
| Executive Summary | 6 |
| Resources | 8 |
| Setting..... | 9 |
| Population Trends and Projections..... | 10 |
| Population Trends | 10 |
| Racial Diversity..... | 10 |
| Population Projections..... | 14 |
| Household Trends and Projections | 16 |
| Employment Trends and Projections..... | 19 |
| Earnings and Income Trends..... | 25 |



Table of Tables

| | |
|--|----|
| Table 1: Population of Minnesota and counties in the MFRC Southeast Landscape Region. | 11 |
| Table 2: Race and ethnicity distribution by county in the Southeast Landscape, 2012..... | 13 |
| Table 3: Population projections for Minnesota and counties in the MFRC Southeast Landscape from 2025-2040, based on 2012 projections from the 2010 U.S. Census Data..... | 14 |
| Table 4: Population projection by age group for Minnesota, 2013-2065..... | 14 |
| Table 5: Average age, in years, of the primary operator of agricultural operations in the Southeast Landscape; 1997, 2002, 2007. | 15 |
| Table 6: Per capita and household earnings, cost, and ownership rate from 2007 to 2011..... | 16 |
| Table 7: U.S. Census household estimates and projections for Minnesota, the southeast counties, and the Southeast Landscape, 2015-2040; projected from the 2010 U.S. Census..... | 17 |
| Table 8: Mean annual employment numbers for counties in the Southeast Landscape, 2003-2012; all industries, ownerships, and establishment sizes. | 20 |
| Table 9: Number of employees and total wages by employment sector in the Minnesota Department of Employment and Economic Development Planning Area ^a , 2012. Several subdivisions of interest are also provided. | 21 |
| Table 10: Estimated and projected employment by major industry for the Minnesota Department of Employment and Economic Development Southeast Planning Area ^a , 2010-2020..... | 22 |
| Table 11: Percent unemployed for the U.S., Minnesota, and counties in the Southeast Landscape, 1990-2012. | 23 |
| Table 12: Total wages (in thousands of dollars) by county in the Southeast Landscape for 2003-2012; all industries, ownerships, and establishment sizes. | 26 |
| Table 13: Average weekly wage (in dollars) in the United States, Minnesota, and counties in the Southeast Landscape, 2003-2012; all industries, ownerships, and establishment sizes. | 27 |
| Table 14: Household earnings for the United States, Minnesota, and counties in Southeast Minnesota, 2011..... | 28 |
| Table 15: Persons with incomes below the poverty level, 2011..... | 30 |



Table of Figures

| | |
|---|----|
| Figure 1: Map of MN Forest Resources Council’s regional landscapes. | 9 |
| Figure 2: 2010 Population Density by Minor Civil Division (MCD)..... | 12 |
| Figure 3: Per capita annual income by county in the Southeast Landscape, 2007 to 2011; based on 2011 dollars..... | 26 |
| Figure 4: Average weekly wage by county in the Southeast Landscape for the first quarter of 2013; all industries, ownerships, and establishment sizes. | 28 |
| Figure 5: Persons with incomes below the poverty level, 2011. | 29 |
| Figure 6: Percent of state-wide population below poverty level by minor civil division, 2010... | 31 |



Executive Summary

The Minnesota Forest Resources Council was established in 1995 by the Minnesota Legislature to provide advice to public and private organizations on forest sustainability issues. This legislation provided authorization for establishing regional landscape committees to foster landscape-based forest resource planning and coordination. These regional committees provide an opportunity to involve private citizens, forestry professionals and members of various interest groups in developing and implementing landscape-level plans that promote forest sustainability. From 1998 to 2005, landscape plans were prepared for each of the six forested regions in the state.

The Southeast Landscape Plan was first completed in 2003 and is currently being updated to reflect new findings, conditions, and changes in regional goals and objectives. This Demographic Data Report was prepared to support the development of the second generation landscape plan and summarizes the best available data from the U.S. Census Bureau, U.S. Bureau of Labor Statistics, Minnesota Department of Employment and Economic Development, the American Community Survey, and Minnesota State Demographic Center on regional population and employment trends and projections.

Key findings include:

- **The region has experienced inconsistent population growth.** The population of the Southeast Landscape has grown at varying rates over the past 4+ decades, but has experienced positive growth overall. However, growth has not been positive across all 13 counties: Freeborn County has experienced steady population decline since 1970, Fillmore County has experienced erratic growth but overall decline since 1970, Houston County has experienced decline since 2000, and Le Sueur, Steele, and Wabasha have experienced recent decline since the 2010 U.S. Census, according to post-Census estimates. Mower County had been in decline between 1970 and 1990, but has been increasing since that time, and Waseca County has fluctuated over the decades between positive and negative growth, but is currently growing. Olmsted, Rice, and Dodge counties have experienced the most rapid population growth in the region in recent years.
- **Overall racial diversity is limited; higher than average ethnic diversity exists in some counties.** Racial diversity is low across the Southeast Landscape; all counties have less diversity than the state-wide averages, with the exception of Olmsted County which is approximately on par with the state-wide averages. Ethnically, 6 of the 13 counties have higher Hispanic or Latino populations than the state-wide average.
- **Regional projected population growth is similar to Minnesota overall, but widely variable among counties.** Population by county is expected to change from -1.2% (Winona County) to 39.0% (Dodge County) by 2045, with an overall increase of 19.0% in the Southeast Landscape.
- **The region's population is aging.** The >65 year-old age group is projected to be the fastest growing age group, by far, through 2025, with the 0-24, 25-65 and >65 year-old age groups growing at similar rates by 2045, and the 0-24 and >65 year-old age groups slowing to a near halt in growth 2065 and the 25-65 year-old group continuing to grow at 6.4%.
- **Farmer age is increasing.** Average age is increasing among farmers in the region, falling between 53.7 and 57.4 in 2007.

- **The region has lower income, but higher homeownership rates compared to Minnesota overall.** Median household income is lower (10 of 13 counties), but homeownership rate is higher (11 of 13 counties) in the Southeast Landscape compared to the state-wide averages. The median value of owner-occupied housing units is lower than the state-wide average in all counties except Rice County.
- **Olmsted, Rice, and Dodge counties exceed state-wide projections for household growth.** While region-wide household growth projections fall below the statewide average, these three counties are expected to outpace overall statewide household growth by 2040. Olmsted County is expected to exceed 50% household growth by that time.
- **Employment numbers indicate that the region is still recovering from the Great Recession.** Six of 13 counties have experienced negative overall employment growth since 2003, though employment numbers did rise between 2011 and 2012 for 10 counties. Steele County is the only county in the region to have exceeded peak pre-Recession employment numbers by 2012.
- **Healthcare-related occupations dominate and will continue to rise.** The Healthcare and Social Assistance sector houses over one-quarter of the region’s employees and provides over one-third of total wages; the Manufacturing sector is the next largest. Healthcare-related occupations are among those projected to experience the largest employment growth in the region by 2020, along with occupations in construction and the sciences.
- **The majority of counties in the region have a lower unemployment rate than the state-wide average.** Despite ongoing recovery from the Great Recession, many counties in the region retain a higher-than-average employment rate compared to the state as a whole (5.1%) as of July 2013. Olmsted County had the lowest unemployment rate in the region at that time (4.2%) and Le Sueur County had the highest (5.8%).
- **Per capita income is lower than the state-wide average.** Counties in the southeast are below the average per capita income state-wide with the exception of Olmsted County, which exceeds the state-wide average by over \$3500 per capita.
- **Most current data indicates that wages fall below the state-wide average.** With the exception of Olmsted County, all Southeast Landscape counties had lower average weekly wages than the state-wide average in the first quarter of 2013.
- **Comparisons of wage growth varies by county.** Seven of 13 counties experienced greater wage growth in the last decade than the state-wide average with Mower County experiencing the highest rate of weekly wage growth during that time (over 35%).
- **The region has overall lower poverty rates than the state-wide average.** As of 2011, 9 of 13 counties in the region had lower poverty rates than Minnesota as a whole (11.8%); Dodge County had the lowest poverty level in the Southeast Landscape (7.4%) and Winona County had the highest (14.6%). All counties in the region had lower poverty rates than the United States overall (15.9%).

Note to Reader: Additional regional data can be found in the report, “Condition and Trends: 2nd Generation Southeast Landscape Plan”, MFRC Southeast Planning Committee, 2014.



Resources

American Community Survey, 2010 and 2011: www.census.gov/acs

Minnesota Department of Employment and Economic Development (MN DEED): mn.gov/deed

Minnesota Forest Resources Council (MFRC): <http://mn.gov/frc/>

Minnesota State Demographic Center: www.demography.state.mn.us

United States Bureau of Labor Statistics: www.bls.gov

United States Census Bureau: www.census.gov; QuickFacts:
<http://quickfacts.census.gov/qfd/states/27000.html>

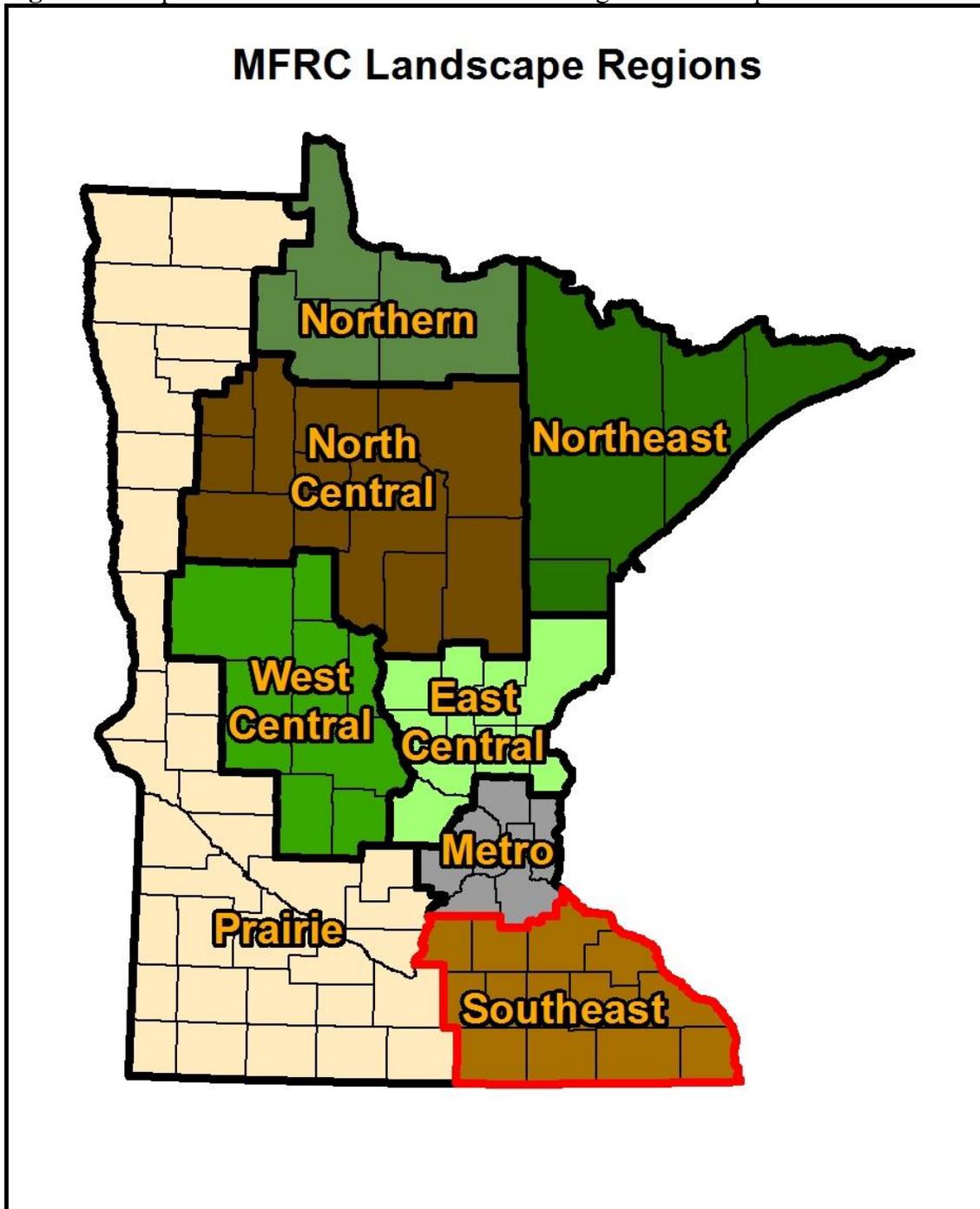
United States Department of Agriculture National Agricultural Statistics Service Quick Stats:
<http://quickstats.nass.usda.gov/>



Setting

The Minnesota Forest Resources Council defines the Southeast Landscape region as the following thirteen-county area: Dodge, Fillmore, Freeborn, Goodhue, Houston, Le Sueur, Mower, Olmsted, Rice, Steele, Wabasha, Waseca, Winona (Figure 1).

Figure 1: Map of MN Forest Resources Council’s regional landscapes.



Source: Minnesota Forest Resources Council



Population Trends and Projections

Population Trends

Minnesota’s population has grown at a fairly steady rate of between 7-8% per decade since 1970, with the exception of a notable jump of 12.4% between 1990 and 2000 (Table 1). The population of the Southeast Landscape has grown somewhat inconsistently between 1970 and 2010, from a low of 3.5% between 1980 and 1990, to a high of 9.5% between 1990 and 2000. According to 2010 U.S. Census data, population distribution is fairly uniform across the region, with the exception of concentrations in major city centers including Rochester, Owatonna, Faribault, Austin, and Lake City (Figure 2).

Current data indicates that only seven counties in the region experienced growth between 2010 and 2012 (Dodge, Goodhue, Mower, Olmsted, Rice, Waseca, Winona) and the other six experienced population decline (Fillmore, Freeborn, Houston, Le Sueur, Steele, Wabasha).

Racial Diversity

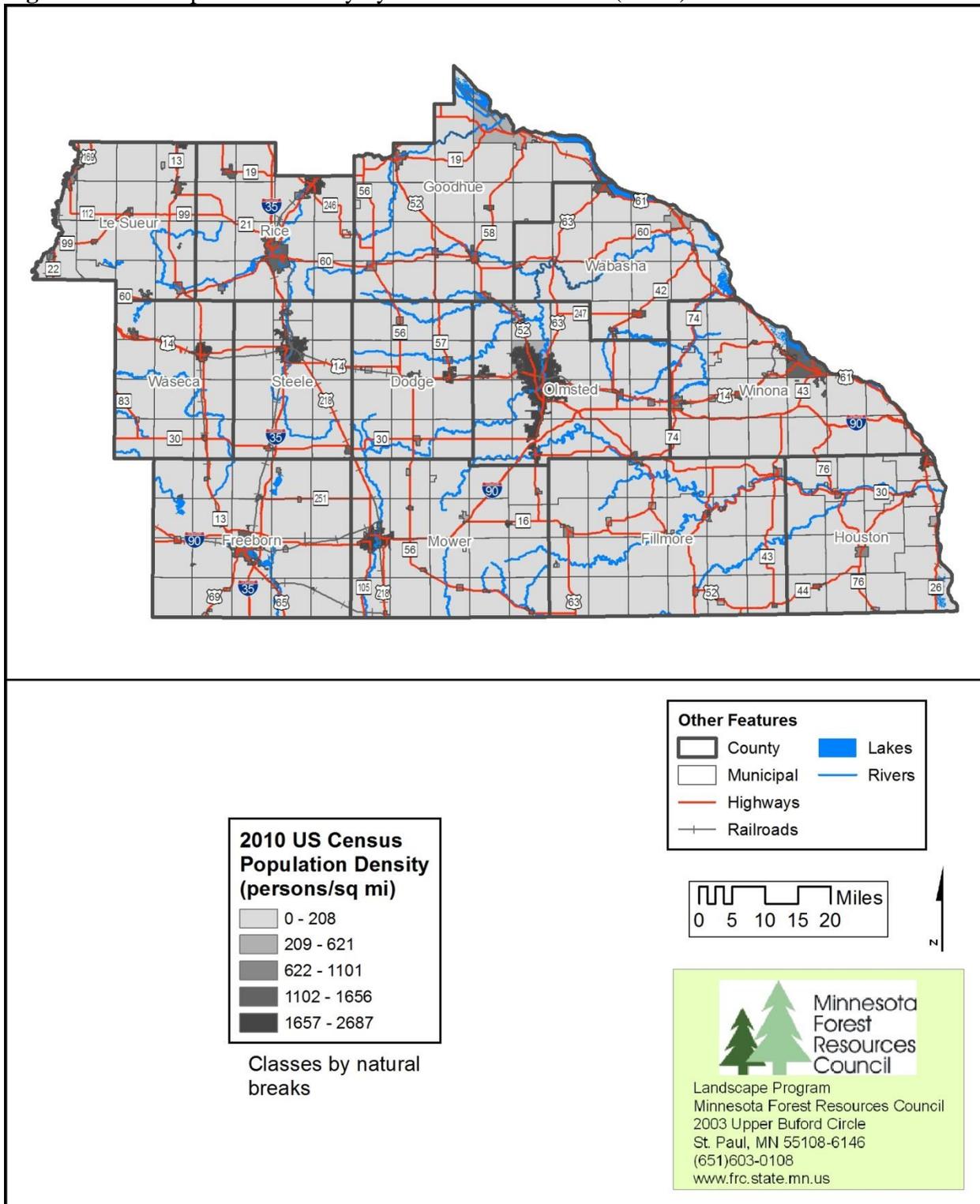
Overall, the Southeast Landscape contains less racial diversity than the state of Minnesota as a whole (Table 2). Exceptions include Olmsted County, which closely parallels Minnesota in terms of racial distribution and exceeds the state’s average for percent of people of Asian descent, and Mower County which contains a slightly higher percent of a people of Native Hawaiian and Other Pacific Islander descent than the state-wide average. In terms of ethnic diversity, six of the region’s thirteen counties contain a higher percent of people of Hispanic or Latino origin than the state-wide average (Freeborn, Le Sueur, Mower, Rice, Steele, Waseca); Mower County contains the highest Hispanic or Latino population in the region (11.1%).

Table 1: Population of Minnesota and counties in the MFRC Southeast Landscape Region.

| | 1970 | 1980 | 1990 | 2000 Census | 1990-2000 %Change | 2010 Census | 2000-2010 %Change | 2012 Estimates | 2010-2012 %Change |
|--------------|-----------|-----------|-----------|-------------|-------------------|-------------|-------------------|----------------|-------------------|
| Minnesota | 3,806,103 | 4,075,970 | 4,375,099 | 4,919,479 | 12.4% | 5,303,925 | 7.8% | 5,379,139 | 1.42% |
| Southeast MN | 422,541 | 446,447 | 461,412 | 505,054 | 9.5% | 541,523 | 7.2% | 544,925 | 0.63% |
| Dodge | 13,037 | 14,773 | 15,731 | 17,731 | 12.7% | 20,087 | 13.3% | 20,231 | 0.72% |
| Fillmore | 21,916 | 21,930 | 20,777 | 21,122 | 1.7% | 20,866 | -1.2% | 20,834 | -0.15% |
| Freeborn | 38,064 | 36,329 | 33,060 | 32,584 | -1.4% | 31,255 | -4.1% | 31,054 | -0.64% |
| Goodhue | 34,804 | 38,749 | 40,690 | 44,127 | 8.4% | 46,183 | 4.7% | 46,336 | 0.33% |
| Houston | 17,556 | 18,382 | 18,497 | 19,718 | 6.6% | 19,027 | -3.5% | 18,837 | -1.00% |
| Le Sueur | 21,332 | 23,434 | 23,239 | 25,426 | 9.4% | 27,703 | 9.0% | 27,677 | -0.09% |
| Mower | 44,919 | 40,390 | 37,385 | 38,603 | 3.3% | 39,163 | 1.5% | 39,372 | 0.53% |
| Olmsted | 84,104 | 92,006 | 106,470 | 124,277 | 16.7% | 144,248 | 16.1% | 147,066 | 1.95% |
| Rice | 41,582 | 46,087 | 49,183 | 56,665 | 15.2% | 64,142 | 13.2% | 64,854 | 1.11% |
| Steele | 26,931 | 30,328 | 30,729 | 33,680 | 9.6% | 36,576 | 8.6% | 36,322 | -0.69% |
| Wabasha | 17,224 | 19,335 | 19,744 | 21,610 | 9.5% | 21,676 | 0.3% | 21,476 | -0.92% |
| Waseca | 16,663 | 18,448 | 18,079 | 19,526 | 8.0% | 19,136 | -2.0% | 19,237 | 0.53% |
| Winona | 44,409 | 46,256 | 47,828 | 49,985 | 4.5% | 51,461 | 3.0% | 51,629 | 0.33% |

Source: Table 1. Annual Estimates of the Population for the United States, Regions, States, and Puerto Rico: April 1, 2010 to July 1, 2012 (NST-EST2012-01), U.S. Census Bureau, Population Division. Release Date: December 2012

Figure 2: 2010 Population Density by Minor Civil Division (MCD)



Source: 2010 U.S. Census

Note: The predominate shade visible in this map is the lightest on the scale, 0-208.

Table 2: Race and ethnicity distribution by county in the Southeast Landscape, 2012

| Race | Minnesota | Dodge | Fillmore | Freeborn | Goodhue | Houston | Le Sueur |
|--|------------------|----------------|-----------------|-----------------|----------------|----------------|-----------------|
| White alone (a) | 86.5% | 97.5% | 98.4% | 96.4% | 95.5% | 97.4% | 97.5% |
| Black or African American alone (a) | 5.5% | 0.5% | 0.3% | 1.0% | 1.1% | 0.6% | 0.5% |
| American Indian and Alaska Native alone (a) | 1.3% | 0.3% | 0.1% | 0.4% | 1.3% | 0.2% | 0.4% |
| Asian alone (a) | 4.4% | 0.5% | 0.4% | 1.0% | 0.7% | 0.5% | 0.6% |
| Native Hawaiian and Other Pacific Islander alone (a) | 0.1% | Z (c) | Z | 0.1% | 0.1% | Z | Z |
| Two or More Races | 2.2% | 1.1% | 0.7% | 1.1% | 1.4% | 1.3% | 0.9% |
| Hispanic or Latino (b) | 4.9% | 4.6% | 1.0% | 9.1% | 3.1% | 0.9% | 5.5% |
| White alone, not Hispanic or Latino | 82.4% | 93.4% | 97.6% | 87.9% | 92.8% | 96.8% | 92.3% |
| Race | Mower | Olmsted | Rice | Steele | Wabasha | Waseca | Winona |
| White alone (a) | 93.2% | 86.5% | 92.1% | 94.9% | 97.8% | 94.7% | 94.8% |
| Black or African American alone (a) | 3.0% | 5.3% | 3.6% | 2.7% | 0.5% | 2.4% | 1.3% |
| American Indian and Alaska Native alone (a) | 0.4% | 0.3% | 0.6% | 0.3% | 0.2% | 0.9% | 0.3% |
| Asian alone (a) | 1.9% | 5.8% | 2.1% | 0.8% | 0.5% | 0.7% | 2.5% |
| Native Hawaiian and Other Pacific Islander alone (a) | 0.2% | 0.1% | 0.1% | Z | Z | Z | Z |
| Two or More Races | 1.4% | 2.0% | 1.5% | 1.3% | 1.0% | 1.2% | 1.1% |
| Hispanic or Latino (b) | 11.1% | 4.4% | 7.9% | 6.8% | 2.8% | 5.8% | 2.6% |
| White alone, not Hispanic or Latino | 82.7% | 82.5% | 84.8% | 88.4% | 95.4% | 89.4% | 92.4% |

Source: United States Census Bureau, State & County Quickfacts; available at:

<http://quickfacts.census.gov/qfd/states/>.

Notes – According to U.S. Census Bureau QuickFact definitions:

(a) “Includes persons reporting only one race.”

(b) “The concept of race is separate from the concept of Hispanic origin. Percentages for the various race categories add to 100 percent, and should not be combined with the percent Hispanic” and “Hispanics may be of any race, so also are included in applicable race categories.” This is why categories do not total 100%.

(c) “Z: Value greater than zero but less than half unit of measure shown.”

Population Projections

Overall, the population of the Southeast Landscape is expected to increase at a slightly greater rate than that of the statewide population between 2010 and 2045 – approximately 19.0% and 17.6%, respectively, by 2040 (Table 3). All counties are expected to increase in population by 2045 with the exception of Winona, which is expected to decrease by 1.2%. Dodge County is expected to experience the most population growth (39.0%) by 2045.

Population projections by age group for Minnesota are available through 2065 from the Minnesota State Demographic Center (Table 4). Between 2013 and 2025, the 0-24 year-old age group is expected to rise 10.7% and the 25-65 age group is expected to decrease slightly (-1.0%), while the >65 age group is expected to increase in population by 46.2% as the “Baby Boomer” generation continues to age. Between 2025 and 2045, rates of growth are expected to even out, increasing 4.7%-7.0% for the three age groups. By 2065 growth rates are expected to slow to a near halt for the 0-24 age group (0.4%) and the >65 age group (1.0%), and increase slightly for the 25-65 age group (6.4%).

The average age of agricultural primary operators in the Southeast Landscape had increased between 1997 and 2007, with all 13 counties experiencing an increase of 2.7 to 5.8 years in average age during that decade (Table 5). In 2007, the average age for this demographic ranged from 53.7 to 57.4 years across the counties.

Table 3: Population projections for Minnesota and counties in the MFRC Southeast Landscape from 2025-2045, based on 2014 projections from the 2010 U.S. Census Data.

| | 2010 | 2025 | 2010-2025 % Change | 2045 | 2010-2045 % Change |
|----------------------------|-----------|-----------|-----------------------|-----------|-----------------------|
| Dodge | 20,087 | 23,994 | 19.5% | 27,912 | 39.0% |
| Fillmore | 20,866 | 22,417 | 7.4% | 23,171 | 11.0% |
| Freeborn | 31,255 | 32,536 | 4.1% | 33,283 | 6.5% |
| Goodhue | 46,183 | 52,103 | 12.8% | 55,636 | 20.5% |
| Houston | 19,027 | 20,430 | 7.4% | 20,526 | 7.9% |
| Le Sueur | 27,703 | 32,078 | 15.8% | 34,662 | 25.1% |
| Mower | 39,163 | 42,551 | 8.7% | 47,650 | 21.7% |
| Olmsted | 144,248 | 165,492 | 14.7% | 185,902 | 28.9% |
| Rice | 64,142 | 68,965 | 7.5% | 71,789 | 11.9% |
| Steele | 36,576 | 41,926 | 14.6% | 47,458 | 29.8% |
| Wabasha | 21,676 | 23,941 | 10.4% | 25,134 | 16.0% |
| Waseca | 19,136 | 20,154 | 5.3% | 20,523 | 7.2% |
| Winona | 51,461 | 52,101 | 1.2% | 50,840 | -1.2% |
| Southeast Total | 541,523 | 598,688 | 10.6% | 644,486 | 19.0% |
| MN Total | 5,303,925 | 5,841,619 | 10.1% | 6,234,930 | 17.6% |

Source: Minnesota State Demographic Center.

*The 2010 US Census Bureau estimate was used to create the population projections through 2045. 2010 numbers are based on the 2010 U.S. census. Projections are from 2014.

Table 4: Population projection by age group for Minnesota, 2013-2065.

| | 2013 | 2025 | % change 2013-2025 | 2045 | % change 2025-2045 | 2065 | % change 2045-2065 |
|---------------|-----------|-----------|--------------------|-----------|--------------------|-----------|--------------------|
| Total | 5,422,475 | 5,841,619 | 7.7% | 6,234,930 | 6.7% | 6,448,396 | 3.4% |
| 0-24 | 1,794,780 | 1,987,311 | 10.7% | 2,115,089 | 6.4% | 2,124,116 | 0.4% |
| 25-65 | 2,929,185 | 2,900,051 | -1.0% | 3,034,928 | 4.7% | 3,228,106 | 6.4% |
| >65 | 698,510 | 1,014,284 | 45.2% | 1,084,913 | 7.0% | 1,096,174 | 1.0% |

Source: Minnesota State Demographic Center.

*The 2010 US Census Bureau data was used to create the population projections through 2065. Projections are from 2014.

Table 5: Average age, in years, of the primary operator of agricultural operations in the Southeast Landscape; 1997, 2002, 2007.

| County | 1997 | 2002 | 2007 |
|----------|------|------|------|
| FREEBORN | 51.3 | 52.3 | 55 |
| LE SUEUR | 52.1 | 55.1 | 57.4 |
| RICE | 50.9 | 53.2 | 56.4 |
| STEELE | 49.7 | 52.5 | 55.5 |
| WASECA | 49.3 | 50.2 | 54.5 |
| DODGE | 49.9 | 51.5 | 54.7 |
| FILLMORE | 51.9 | 53.5 | 54.6 |
| GOODHUE | 49.4 | 50.9 | 53.9 |
| HOUSTON | 53 | 55.8 | 56.3 |
| MOWER | 50.1 | 51.4 | 53.7 |
| OLMSTED | 53 | 53.5 | 55.9 |
| WABASHA | 50 | 52 | 54.7 |
| WINONA | 51.3 | 53.2 | 54.5 |

Source: USDA National Agricultural Statistics Service Quick Stats. Accessed Feb. 13, 2014. Available at: <http://quickstats.nass.usda.gov/>



Household Trends and Projections

According to the U.S. Census Bureau, Minnesota currently contains over 2.09 million households and over 2.35 million housing units (Table 6). In the MFRC Southeast Landscape, Olmsted County contains the most households and housing units, and Waseca contains the fewest. Dodge County has the most number of persons per household (2.69) and Freeborn County has the fewest (2.33). Median annual household income is highest in Dodge County (\$66,216) (followed closely by Olmsted County (\$66,202)) and lowest in Freeborn (\$43,447); 10 of the 13 counties in the region have median household incomes below the state median, with Dodge, Olmsted, and Rice Counties being the exceptions. Homeownership rate is highest in Dodge County (86.90%) and lowest in Winona County (71.00%); 11 of the 13 counties in the region have higher homeownership rates than the state average, with Mower and Winona Counties being the exceptions. Dodge County also has the lowest percentage of housing units in multi-unit structures (7.60%) and Winona County has the highest (23.40%). The median value of owner-occupied housing units in most counties in the region is lower than the state-wide average (\$201,400), with the exception of Rice County which is marginally higher (\$204,200). Mower County has the lowest median value of owner-occupied housing units (\$108,300).

According to the Minnesota State Demographic Center, household numbers state-wide are projected to rise by 12.1% between 2010 and 2020, and 32.3% between 2010 and 2040 (Table 7). Household projections for the MFRC Southeast Landscape are lower, 10.5% and 28.9% respectively. However, three counties in the region – Dodge, Olmsted, and Rice – are projected to have greater increases in households by 2040 than the state as a whole; Olmsted County has the highest projected rate of household growth by 2040 (51.3%). Fillmore and Wabasha counties, however, have only a 0.4% and 2.6% projected overall rate of household growth by 2040, with projected numbers of household beginning to decline after 2025.

Table 6: Per capita and household earnings, cost, and ownership rate from 2007 to 2011.

| Area | Households* | Persons per household | Median annual household income | % above or below median MN household income [†] |
|----------|-------------|-----------------------|--------------------------------|--|
| Dodge | 7,347 | 2.69 | \$66,216 | 13.2% |
| Fillmore | 8,507 | 2.4 | \$47,940 | -18.0% |
| Freeborn | 13,210 | 2.33 | \$43,447 | -25.7% |
| Goodhue | 18,686 | 2.41 | \$56,099 | -4.1% |
| Houston | 7,810 | 2.4 | \$53,017 | -9.3% |
| Le Sueur | 10,938 | 2.51 | \$58,074 | -0.7% |
| Mower | 16,042 | 2.39 | \$45,596 | -22.0% |
| Olmsted | 56,601 | 2.47 | \$66,202 | 13.2% |
| Rice | 22,117 | 2.51 | \$59,533 | 1.8% |
| Steele | 14,053 | 2.55 | \$57,290 | -2.0% |

| Wabasha | 8,751 | 2.44 | \$52,346 | -10.5% |
|-----------|-------------------------------|-----------------------|---|--|
| Waseca | 7,303 | 2.46 | \$52,357 | -10.5% |
| Winona | 19,292 | 2.45 | \$44,848 | -23.3% |
| Minnesota | 2,094,265 | 2.46 | \$58,476 | -- |
| Area | Housing units* (2011 only) | Homeownership rate | % housing units in multi- unit structures | Median value of owner- occupied housing units |
| Dodge | 7,980 | 86.90% | 7.60% | \$162,100 |
| Fillmore | 9,734 | 80.10% | 10.10% | \$137,000 |
| Freeborn | 14,229 | 79.00% | 13.50% | \$109,500 |
| Goodhue | 20,357 | 78.50% | 16.20% | \$188,000 |
| Houston | 8,591 | 81.70% | 10.50% | \$151,000 |
| Le Sueur | 12,413 | 82.80% | 10.60% | \$190,900 |
| Mower | 17,002 | 73.10% | 16.90% | \$108,300 |
| Olmsted | 60,958 | 75.90% | 21.30% | \$173,000 |
| Rice | 24,606 | 77.20% | 17.60% | \$204,200 |
| Steele | 15,376 | 78.00% | 16.10% | \$158,800 |
| Wabasha | 9,972 | 83.50% | 9.90% | \$160,300 |
| Waseca | 7,900 | 80.60% | 14.20% | \$142,700 |
| Winona | 20,733 | 71.00% | 23.40% | \$160,200 |
| Minnesota | 2,354,034 | 73.60% | 21.60% | \$201,400 |

Source: United States Census Bureau, State & County Quickfacts; available at: <http://quickfacts.census.gov/qfd/states/>.

* According to U.S. Census Bureau QuickFact definitions: "A household includes all the persons who occupy a housing unit as their usual place of residence. A housing unit is a house, an apartment, a mobile home, a group of rooms, or a single room that is occupied (or if vacant, is intended for occupancy) as separate living quarters."

† Extrapolated from U.S. Census median household income numbers for 2007-2011.

Table 7: U.S. Census household estimates and projections for Minnesota, the southeast counties, and the Southeast Landscape, 2015-2040; projected from the 2010 U.S. Census.

| County | 2010 (U.S Census) | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | % change 2010- 2020 | % change 2010- 2040 |
|----------|-------------------------|--------|--------|--------|--------|--------|--------|------------------------------|------------------------------|
| Dodge | 7,460 | 7,954 | 8,498 | 9,026 | 9,532 | 10,024 | 10,511 | 13.9% | 40.9% |
| Fillmore | 8,545 | 8,626 | 8,724 | 8,762 | 8,742 | 8,676 | 8,576 | 2.1% | 0.4% |
| Freeborn | 13,177 | 13,506 | 13,763 | 14,011 | 14,250 | 14,502 | 14,785 | 4.4% | 12.2% |
| Goodhue | 18,730 | 19,603 | 20,507 | 21,316 | 22,024 | 22,651 | 23,222 | 9.5% | 24.0% |
| Houston | 7,849 | 8,209 | 8,525 | 8,816 | 9,080 | 9,323 | 9,559 | 8.6% | 21.8% |
| Le Sueur | 10,758 | 10,923 | 11,406 | 11,754 | 12,126 | 12,453 | 12,793 | 6.0% | 18.9% |
| Mower | 15,828 | 16,217 | 16,500 | 16,725 | 16,893 | 17,024 | 17,142 | 4.2% | 8.3% |

| | | | | | | | | | |
|---------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-------|-------|
| Olmsted | 57,080 | 61,724 | 66,823 | 71,855 | 76,761 | 81,576 | 86,363 | 17.1% | 51.3% |
| Rice | 22,315 | 23,795 | 25,512 | 27,192 | 28,815 | 30,400 | 31,972 | 14.3% | 43.3% |
| Steele | 14,330 | 14,880 | 15,490 | 15,999 | 16,400 | 16,706 | 16,937 | 8.1% | 18.2% |
| Wabasha | 8,822 | 9,039 | 9,231 | 9,323 | 9,314 | 9,218 | 9,049 | 4.6% | 2.6% |
| Waseca | 7,281 | 7,456 | 7,622 | 7,754 | 7,849 | 7,916 | 7,964 | 4.7% | 9.4% |
| Winona | 19,554 | 20,549 | 21,366 | 22,116 | 22,793 | 23,422 | 24,032 | 9.3% | 22.9% |
| Total Southeast Landscape | 211,729 | 222,481 | 233,967 | 244,649 | 254,579 | 263,891 | 272,905 | 10.5% | 28.9% |
| Total Minnesota | 2,087,227 | 2,216,515 | 2,339,934 | 2,454,854 | 2,562,091 | 2,662,944 | 2,760,924 | 12.1% | 32.3% |

Source: Megan Robertson, Minnesota State Demographic Center, January, 2013; Revised and Corrected April, 2013. Available at: <http://www.demography.state.mn.us/projectionsHousehold2015-2040.htm>.



Employment Trends and Projections

The U.S. Bureau of Economic Analysis defines employment as employment covered by social security. All employment and earnings data are reported for industries classified by North American Industry Classification System (NAICS) codes. The NAICS was developed and is revised periodically in an effort to enhance the comparability of industry employment and wage statistics across Mexico, Canada, and the United States, and reflect economic activities within industries more accurately. It is also important to note that these data are reported by place of work rather than by employee's place of residence (as it is with U.S. Census data).

These codes are used to provide a detailed accounting of employment and earnings by industry at the county, state, and national level. This data is based off social security data and tend to emphasize some industries more than others such as manufacturing compared to service industry data. Tourism is captured indirectly through codes for eating and drinking places, hotels and lodging places, and automobile dealers and service stations under the service industry category.

Data disclosure laws are a problem frequently found in county-level data. These laws prevent the release of data that would make it possible to identify a specific business within a geographic area. Lack of disclosure results in incomplete or absent data for some industry categories. Proprietary employment is not reflected in employment numbers.

According to the Bureau of Labor Statistics, Minnesota has enjoyed a modest overall growth in employment numbers over the last 10 years (2003-2012), despite a dip in numbers after the Great Recession (Table 8). However, 6 of 13 counties in the MFRC Southeast Landscape have experienced overall negative employment growth since 2003 (Fillmore, Freeborn, Houston, Le Sueur, Rice, Waseca); three of these counties (Fillmore, Freeborn, Houston) have also experienced population declines (Table 1). Steele County has experienced the highest overall rate of employment growth in the region since 2003 (12.9%) and is the only southeast county to have recovered and exceeded peak pre-recession employment numbers by 2012.

The largest employment sector in southeast Minnesota – excluding Waseca and Le Sueur for this analysis – is the Health Care and Social Assistance sector, which contains over one-quarter of the total recorded employees and provides over one-third of the total recorded wages in the region (Table 9). These numbers will no doubt continue to rise with the expansion of the Mayo Clinic's Destination Medical Center (DMC) in Rochester, and in fact employment projections through 2020 show healthcare related occupations as among the sectors of largest projected employment growth (Table 10). Manufacturing is also a large industry in the region, containing 15.8% of employees and providing 19% of the wages. Agriculture, Forestry, Fishing and Hunting, however, is one of the smallest sectors in the region, containing only 1.2% of the employees and providing 0.8% of the wages (Table 9); this seems surprising considering the fact that over half of the land in southeast Minnesota is in agriculture (see Figure 4 in MFRC 2013 *Conditions and Trends, 2nd Generation Southeast Landscape Plan*).

In addition to health and personal care related services, two other projected areas of job growth in southeast Minnesota include Construction and Extraction Operations and Life, Physical, and Social Science Occupations (Table 10). The project rise in construction jobs may also be related, in part, to the construction of the DMC in Rochester.

As of July 2013, the unemployment rate in the United States was 7.7%, a substantial decrease from the 9.6% it peaked at in 2010 following the Great Recession, but not yet back down to the pre-Recession rate of 4.6% in 2007 (

Table 11). Minnesota’s unemployment rate has consistently been lower than the national average, currently at 5.1%. Eight of 13 counties in the MFRC Southeast Landscape were below Minnesota’s unemployment average in July 2013, one was the same, and four were above the state’s average. Olmsted County had the lowest unemployment rate in the region in July 2013 (4.2%) and Le Sueur County had the highest (5.8%).

Table 8: Mean annual employment numbers for counties in the Southeast Landscape, 2003-2012; all industries, ownerships, and establishment sizes.

| Year | MN | Dodge | Fillmore | Freeborn | Goodhue | Houston | Le Sueur |
|---------------------------|-----------|---------|----------|----------|---------|---------|----------|
| 2003 | 2,576,452 | 4,782 | 6,603 | 12,863 | 21,305 | 5,202 | 8,367 |
| 2004 | 2,600,360 | 5,114 | 6,542 | 12,718 | 21,554 | 5,164 | 8,270 |
| 2005 | 2,640,326 | 5,458 | 6,540 | 12,567 | 20,988 | 5,255 | 7,991 |
| 2006 | 2,670,222 | 5,515 | 6,467 | 12,800 | 21,263 | 5,094 | 7,920 |
| 2007 | 2,687,482 | 5,518 | 6,379 | 12,799 | 21,395 | 5,049 | 7,908 |
| 2008 | 2,679,527 | 5,476 | 6,196 | 12,693 | 21,441 | 5,000 | 7,793 |
| 2009 | 2,569,651 | 5,066 | 5,944 | 12,077 | 20,972 | 4,827 | 7,195 |
| 2010 | 2,558,310 | 5,120 | 5,951 | 12,036 | 20,884 | 4,821 | 7,189 |
| 2011 | 2,602,988 | 5,157 | 5,915 | 12,245 | 21,553 | 4,840 | 7,378 |
| 2012 | 2,644,408 | 5,268 | 5,973 | 12,130 | 21,403 | 4,964 | 7,574 |
| % change 2003-2012 | 2.6% | 10.2% | -9.5% | -5.7% | 0.5% | -4.6% | -9.5% |
| Year | Mower | Olmsted | Rice | Steele | Wabasha | Waseca | Winona |
| 2003 | 15,824 | 86,520 | 23,075 | 19,131 | 6,804 | 8,139 | 23,483 |
| 2004 | 15,927 | 87,167 | 22,767 | 19,744 | 6,890 | 8,209 | 23,769 |
| 2005 | 16,235 | 88,741 | 22,197 | 20,046 | 7,225 | 8,133 | 24,601 |
| 2006 | 16,110 | 90,153 | 22,557 | 20,567 | 7,117 | 8,239 | 24,982 |
| 2007 | 16,338 | 90,821 | 22,850 | 21,038 | 6,954 | 7,920 | 25,028 |
| 2008 | 16,370 | 90,025 | 23,161 | 21,382 | 7,001 | 8,073 | 25,295 |
| 2009 | 16,124 | 88,312 | 22,772 | 19,986 | 6,674 | 7,571 | 23,630 |
| 2010 | 16,092 | 87,089 | 22,298 | 20,232 | 6,623 | 7,567 | 23,340 |
| 2011 | 16,118 | 88,169 | 22,498 | 20,810 | 6,753 | 7,678 | 23,947 |
| 2012 | 16,171 | 90,948 | 22,825 | 21,594 | 6,848 | 7,306 | 24,800 |
| % change 2003-2012 | 2.2% | 5.1% | -1.1% | 12.9% | 0.6% | -10.2% | 5.6% |

Source: United States Bureau of Labor Statistics, Quarterly Census of Employment and Wages, State and County Wages Database, available at: <http://www.bls.gov/cew/data.htm>

Table 9: Number of employees and total wages by employment sector in the Minnesota Department of Employment and Economic Development Planning Area^a, 2012. Several subdivisions of interest are also provided.

| Industry | Average Number of Employees | % of Total ^b | Total Wages | % of Total |
|--|-----------------------------|-------------------------|------------------|---------------|
| Total, All Industries ^c | 233107 | (98.6% + n/a) | \$10,028,725,918 | (98.5% + n/a) |
| Agriculture, Forestry, Fishing and Hunting | 2875 | 1.2% | \$77,875,606 | 0.8% |
| Mining | 116 | 0.0% | \$5,180,676 | 0.1% |
| Construction | 7940 | 3.4% | \$369,117,324 | 3.7% |
| • Construction of buildings | 1,520 | 0.7% | \$63,683,944 | 0.6% |
| Manufacturing | 36747 | 15.8% | \$1,902,394,610 | 19.0% |
| • Wood Product Manufacturing ^d | n/a | n/a | n/a | n/a |
| • Paper Manufacturing | 476 | 0.2% | \$22,389,644 | 0.2% |
| Utilities | 1471 | 0.6% | \$148,718,620 | 1.5% |
| Wholesale Trade | 6641 | 2.8% | \$378,281,349 | 3.8% |
| Retail Trade | 26710 | 11.5% | \$611,598,843 | 6.1% |
| Transportation and Warehousing | 6966 | 3.0% | \$296,088,437 | 3.0% |
| Information | n/a | n/a | n/a | n/a |
| Finance and Insurance | 5943 | 2.5% | \$364,466,794 | 3.6% |
| Real Estate and Rental and Leasing | 1561 | 0.7% | \$41,232,815 | 0.4% |
| Professional, Scientific, and Technical Services | 3752 | 1.6% | \$172,807,974 | 1.7% |
| Management of Companies and Enterprises | 2771 | 1.2% | \$221,342,863 | 2.2% |
| Administrative and Support and Waste Management and Remediation Services | 9135 | 3.9% | \$204,339,651 | 2.0% |
| Educational Services | 18413 | 7.9% | \$731,956,558 | 7.3% |
| Health Care and Social Assistance | 60408 | 25.9% | \$3,450,763,438 | 34.4% |
| Arts, Entertainment, and Recreation | 3768 | 1.6% | \$75,455,956 | 0.8% |
| Accommodation and Food Services | 18117 | 7.8% | \$237,181,248 | 2.4% |
| Other Services (except Public Administration) | 6292 | 2.7% | \$131,452,021 | 1.3% |
| Public Administration | 10105 | 4.3% | \$457,585,341 | 4.6% |
| Unclassified | n/a | n/a | n/a | n/a |

Source: Minnesota Department of Employment and Economic Development (MN DEED).

^aThe MN DEED Southeast Planning Area includes Dodge, Fillmore, Freeborn, Goodhue, Houston, Mower, Olmsted, Rice, Steele, Wabasha, Winona Counties. Employment figures for Waseca and Le Sueur Counties are not reflected here.

^bPercents of total do not sum to 100 because data was not available for the Information sector and Unclassified positions to avoid disclosure of confidential information; estimates for these items are included in the totals.

^cProprietary employment is not reflected in the total sum of all industries.

^dEmployment and wage numbers were only available for the 3rd and 4th quarters for Wood Product Manufacturing and thus an annual average/total was not available; however, numbers were similar to that of Paper Manufacturing.

Table 10: Estimated and projected employment by major industry for the Minnesota Department of Employment and Economic Development Southeast Planning Area^a, 2010-2020.

| Title | Estimate Year Employment (2010) | Projected Year Employment (2020) | % Change |
|--|--|---|---------------------|
| Total, All Occupations | 255,288 | 291,672 | 14.3 |
| Management Occupations | 19,103 | 19,762 | 3.4 |
| Business and Financial Operations Occupations | 9,932 | 11,470 | 15.5 |
| Computer and Mathematical Occupations | 6,397 | 7,088 | 10.8 |
| Architecture and Engineering Occupations | 3,327 | 3,512 | 5.6 |
| Life, Physical, and Social Science Occupations | 2,187 | 2,713 | 24.1 |
| Community and Social Service Occupations | 4,927 | 5,908 | 19.9 |
| Legal Occupations | 914 | 1,001 | 9.5 |
| Education, Training, and Library Occupations | 14,419 | 15,349 | 6.4 |
| Arts, Design, Entertainment, Sports, and Media Occupations | 3,901 | 4,316 | 10.6 |
| Healthcare Practitioners and Technical Occupations | 22,109 | 27,737 | 25.5 |
| Healthcare Support Occupations | 12,689 | 16,945 | 33.5 |
| Protective Service Occupations | 4,009 | 4,292 | 7.1 |
| Food Preparation and Serving Related Occupations | 18,518 | 19,708 | 6.4 |
| Building and Grounds Cleaning and Maintenance Occupations | 8,876 | 10,025 | 12.9 |
| Personal Care and Service Occupations | 9,406 | 12,096 | 28.6 |
| Sales and Related Occupations | 23,016 | 25,885 | 12.5 |
| Office and Administrative Support Occupations | 33,905 | 37,842 | 11.6 |
| Farming, Fishing, and Forestry Occupations | 2,470 | 2,755 | 11.5 |
| Construction and Extraction Occupations | 8,542 | 10,788 | 26.3 |
| Installation, Maintenance, and Repair Occupations | 8,908 | 10,367 | 16.4 |
| Production Occupations | 22,268 | 23,979 | 7.7 |
| Transportation and Material Moving Occupations | 15,465 | 18,134 | 17.3 |

Source: Minnesota Department of Employment and Economic Development.

^aThe MN DEED Southeast Planning Area includes Dodge, Fillmore, Freeborn, Goodhue, Houston, Mower, Olmsted, Rice, Steele, Wabasha, Winona Counties. Employment figures for Waseca and Le Sueur Counties are not reflected here.

Table 11: Percent unemployed for the U.S., Minnesota, and counties in the Southeast Landscape, 1990-2012.

| Year-Month | U.S. | Minnesota | Dodge County | Fillmore County | Freeborn County | Goodhue County | Houston County |
|-------------|------|-----------|--------------|-----------------|-----------------|----------------|----------------|
| 2013 (July) | 7.7% | 5.1% | 4.9% | 4.8% | 5.1% | 5.0% | 5.4% |
| 2012 | 8.1 | 5.6 | 5.3 | 5.5 | 5.9 | 5.4 | 6.3 |
| 2011 | 8.9 | 6.5 | 6.1 | 6.4 | 6.6 | 6.2 | 7.2 |
| 2010 | 9.6 | 7.4 | 7 | 7.2 | 7.7 | 7.2 | 7.9 |
| 2009 | 9.3 | 8 | 7.6 | 8.4 | 8.7 | 7.9 | 8.2 |
| 2008 | 5.8 | 5.4 | 5.2 | 6.1 | 5.7 | 5.6 | 5.7 |
| 2007 | 4.6 | 4.7 | 4.4 | 5.1 | 5 | 5 | 5.1 |
| 2006 | 4.6 | 4.1 | 3.8 | 4.2 | 4.5 | 4.3 | 4.3 |
| 2005 | 5.1 | 4.2 | 4 | 4.3 | 4.8 | 4.5 | 4.6 |
| 2004 | 5.5 | 4.6 | 4.3 | 5 | 5.3 | 4.8 | 5.2 |
| 2003 | 6 | 4.9 | 4.4 | 5 | 5.3 | 4.8 | 5.3 |
| 2002 | 5.8 | 4.5 | 4 | 4.3 | 4.9 | 4.5 | 4.9 |
| 2001 | 4.7 | 3.8 | 3.5 | 3.7 | 4.7 | 3.5 | 4.4 |
| 2000 | 4 | 3.1 | 3 | 3.1 | 3.5 | 3 | 4 |
| 1999 | 4.2 | 2.8 | 3.2 | 3.3 | 2.7 | 2.9 | 3.5 |
| 1998 | 4.5 | 2.8 | 3.5 | 3.3 | 2.6 | 2.7 | 2.8 |
| 1997 | 4.9 | 3.3 | 4.3 | 3.8 | 3.6 | 3.2 | 3.1 |
| 1996 | 5.4 | 3.9 | 5.6 | 5.1 | 4.4 | 4.3 | 3.9 |
| 1995 | 5.6 | 3.7 | 5.4 | 4.7 | 4.7 | 3.8 | 3.5 |
| 1994 | 6.1 | 4.1 | 5.9 | 5.1 | 6.8 | 4.1 | 3.1 |
| 1993 | 6.9 | 4.9 | 6.3 | 5.8 | 5.5 | 4.4 | 4.6 |
| 1992 | 7.5 | 5.1 | 5.9 | 5.5 | 4.4 | 3.9 | 4 |
| 1991 | 6.8 | 5.2 | 6.2 | 5.5 | 5.9 | 4.1 | 4.3 |
| 1990 | 5.6 | 4.8 | 5.3 | 4.6 | 11.4 | 3.6 | 3.5 |

Source: Minnesota Department of Employment and Economic Development.

Table 11 (continued): Percent unemployed for the U.S., Minnesota, and counties in the Southeast Landscape, 1990-2012.

| Year-Month | Le Sueur County | Mower County | Olmsted County | Rice County | Steele County | Wabasha County | Waseca County | Winona County |
|-------------|-----------------|--------------|----------------|-------------|---------------|----------------|---------------|---------------|
| 2013 (July) | 5.8% | 4.6% | 4.2% | 5.7% | 4.6% | 4.7% | 5.3% | 4.9% |
| 2012 | 7.1 | 4.9 | 4.5 | 6.4 | 5.5 | 5.1 | 5.8 | 5 |
| 2011 | 8.2 | 5.4 | 5.3 | 7.1 | 6.4 | 6 | 6.3 | 5.9 |
| 2010 | 9.5 | 5.8 | 6 | 8.2 | 7.7 | 6.9 | 7.5 | 6.8 |
| 2009 | 10.9 | 6.5 | 6.3 | 8.8 | 8.9 | 7.8 | 8.5 | 7.9 |
| 2008 | 7.3 | 4.6 | 4.4 | 5.9 | 5 | 5 | 5.4 | 4.8 |
| 2007 | 6.2 | 4.1 | 3.8 | 5 | 4.4 | 4.5 | 4.8 | 4.2 |
| 2006 | 5.5 | 3.9 | 3.5 | 4.4 | 4 | 4.1 | 4.2 | 3.6 |
| 2005 | 5.6 | 3.9 | 3.6 | 4.6 | 4.2 | 4.2 | 4.5 | 3.7 |

| | | | | | | | | |
|------|-----|-----|-----|-----|-----|-----|-----|-----|
| 2004 | 5.7 | 4.4 | 4 | 4.7 | 4.6 | 4.4 | 4.5 | 4.3 |
| 2003 | 6.3 | 4.5 | 4.3 | 4.8 | 4.9 | 4.4 | 4.7 | 4.7 |
| 2002 | 6 | 4 | 3.9 | 4.5 | 4.5 | 3.8 | 4.7 | 4.1 |
| 2001 | 5.1 | 3.5 | 2.9 | 3.6 | 3.9 | 3.4 | 3.8 | 3.7 |
| 2000 | 3.8 | 2.9 | 2.6 | 3.1 | 2.9 | 2.9 | 3 | 3.1 |
| 1999 | 3.4 | 2.1 | 2 | 2.9 | 2.5 | 2.4 | 3.2 | 2.6 |
| 1998 | 3.4 | 2.2 | 1.7 | 2.9 | 2.4 | 2.7 | 3 | 2.3 |
| 1997 | 4.1 | 2.8 | 2.2 | 3.3 | 3.1 | 3.4 | 3.1 | 3.2 |
| 1996 | 4.9 | 3.4 | 3 | 4 | 3.6 | 4.6 | 4.2 | 3.8 |
| 1995 | 4.5 | 3.2 | 2.9 | 4.1 | 3.8 | 4.1 | 3.6 | 3.7 |
| 1994 | 4.7 | 3.9 | 3.5 | 4.8 | 3.7 | 4.3 | 4.3 | 3.6 |
| 1993 | 5.8 | 3.8 | 3.1 | 5.2 | 4.1 | 4.5 | 5.7 | 4.7 |
| 1992 | 6.1 | 3.7 | 2.9 | 5.6 | 4.7 | 4.8 | 5.1 | 5 |
| 1991 | 6.7 | 3.8 | 2.9 | 5.3 | 4.9 | 5.2 | 4.7 | 6 |
| 1990 | 5.8 | 4.3 | 2.8 | 4.4 | 3.5 | 4.4 | 3.8 | 5.6 |

Source: Minnesota Department of Employment and Economic Development.



Earnings and Income Trends

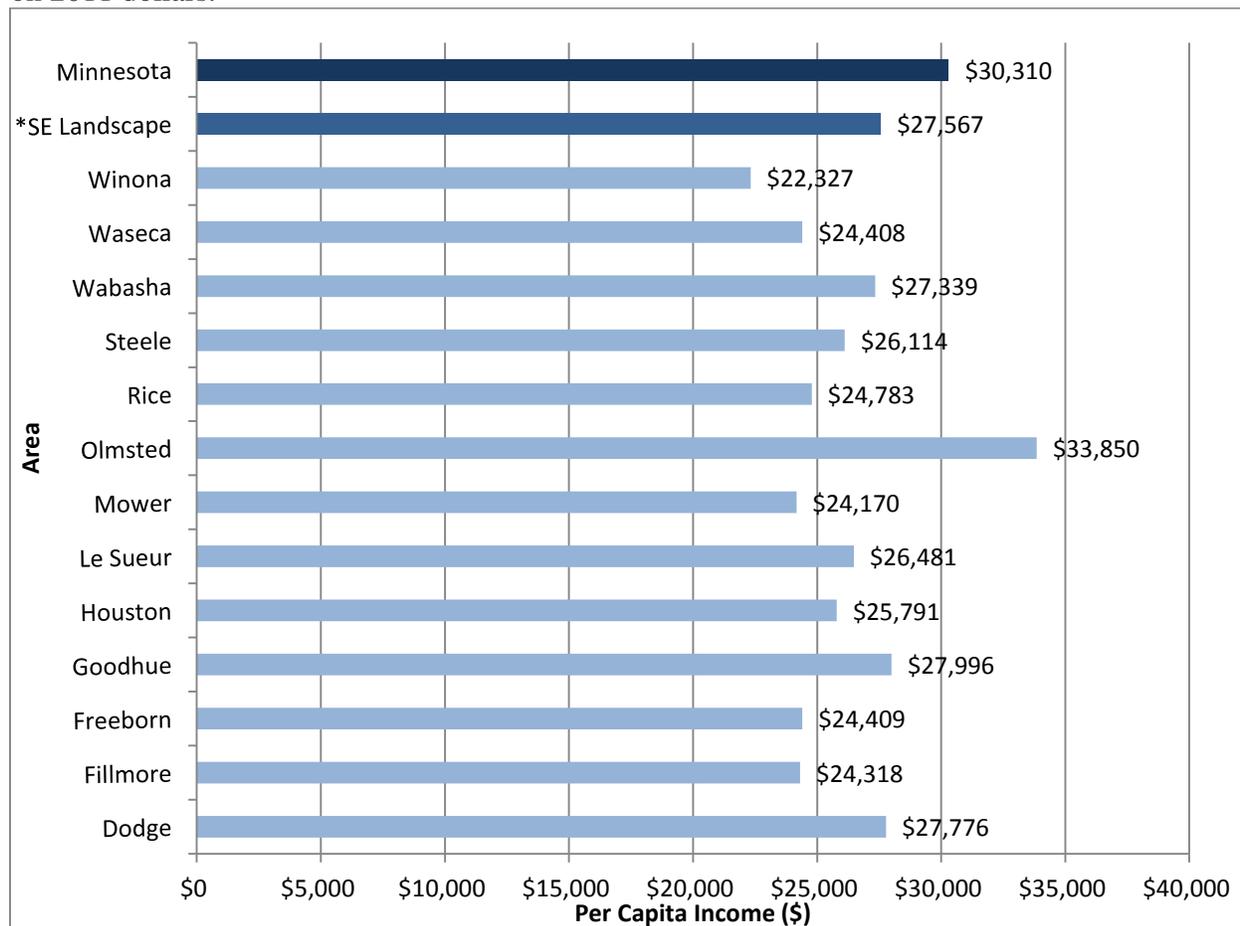
According to the U.S. Census Bureau, the average per capita income for the state of Minnesota is \$30,310, which exceeds the average for the MFRC Southeast Landscape of \$27,567 (extrapolated from U.S. Census 2010 population and 2007-2011 income numbers) (Figure 3). Most counties in the region are below or near this latter average, with the exception of Olmsted County at \$33,850, which exceeds the next highest-income county (Goodhue) by nearly \$6,000 per capita.

In terms of wages, Olmsted County workers earned the most total wages in 2012 by a large margin, followed by Winona, Rice, and Steele Counties (Table 12). Average weekly wage in 2012 was also highest for Olmsted County, followed by Mower, Rice, and Goodhue Counties (Table 13). Over the last ten years (2003-2012), average weekly wage has grown 30.6% for the United States and 27.9% for Minnesota. Most counties in southeast Minnesota fell below the U.S. average, with a few exceptions; Mower County exhibited the greatest weekly wage growth in the last decade (35.4%), followed by Olmsted (30.7%) and Waseca (30.6%) Counties. Seven southeast counties experienced greater weekly wage growth in the past decade than the state-wide average, and six experienced less. As of the first quarter of 2013, with the exception of Olmsted County (\$1005) all counties in the MFRC Southeast Landscape had average weekly wages well below the 2012 Minnesota average (\$1002) (Figure 4). Minnesota's weekly wage exceeded the U.S. average by \$13.

The average estimated median household income for the United States is approximately \$50,500 per year, while the average for Minnesota is nearly \$57,000 (Table 14). The county with the highest annual median household income is Olmsted County (\$66,997) and Freeborn County has the lowest (\$44,352).

Minnesota's poverty level is also below the national average, at 11.8% statewide versus 15.9% nationwide (Table 15, Figure 5). Nine of 13 counties have poverty rates below the state-wide average, with Winona, Mower, Freeborn, and Fillmore as the exceptions. Dodge County has the lowest poverty level in the Southeast Landscape (7.4%) and Winona County has the highest (14.6%). Overall, southeast Minnesota has significantly less poverty (by percentage of the population) when compared to the northeastern and north central parts of the state; highest concentrations of poverty in southeastern Minnesota appear to be most concentrated in certain areas of Fillmore, Winona, and Mower Counties (Figure 6).

Figure 3: Per capita annual income by county in the Southeast Landscape, 2007 to 2011; based on 2011 dollars.



Source: United States Census Bureau, State & County Quickfacts; available at: <http://quickfacts.census.gov/qfd/states/>.

* Average per capita income for Southeast Landscape extrapolated from 2010 U.S. Census population estimates for counties and per capita incomes listed here.

Table 12: Total wages (in thousands of dollars) by county in the Southeast Landscape for 2003-2012; all industries, ownerships, and establishment sizes.

| Year | MN | Dodge | Fillmore | Freeborn | Goodhue | Houston | Le Sueur |
|------|-------------|---------|----------|----------|---------|---------|----------|
| 2003 | 99,476,489 | 142,253 | 158,830 | 342,893 | 645,152 | 122,180 | 221,764 |
| 2004 | 105,050,054 | 166,523 | 162,586 | 349,202 | 704,755 | 127,043 | 229,773 |
| 2005 | 107,725,990 | 169,918 | 157,034 | 344,151 | 684,496 | 127,104 | 220,272 |
| 2006 | 112,643,824 | 187,736 | 161,601 | 364,817 | 703,057 | 126,847 | 227,270 |
| 2007 | 119,256,275 | 187,835 | 168,929 | 377,011 | 727,621 | 130,425 | 230,948 |
| 2008 | 122,791,643 | 194,740 | 164,977 | 390,331 | 774,028 | 133,409 | 244,713 |
| 2009 | 116,455,044 | 171,472 | 161,233 | 382,906 | 759,386 | 131,462 | 218,504 |
| 2010 | 119,695,377 | 181,731 | 165,031 | 393,510 | 779,090 | 131,664 | 231,845 |
| 2011 | 124,573,345 | 182,598 | 169,308 | 408,431 | 817,055 | 131,827 | 245,350 |
| 2012 | 130,497,927 | 194,400 | 174,043 | 413,972 | 829,790 | 143,285 | 261,549 |

| % change 2003-2012 | 31.2% | 36.7% | 9.6% | 20.7% | 28.6% | 17.3% | 17.9% |
|-------------------------------|---------|-----------|---------|---------|---------|---------|---------|
| Year | Mower | Olmsted | Rice | Steele | Wabasha | Waseca | Winona |
| 2003 | 476,692 | 3,474,967 | 725,366 | 600,033 | 183,805 | 223,963 | 664,285 |
| 2004 | 507,031 | 3,627,604 | 740,266 | 637,669 | 190,156 | 228,616 | 703,533 |
| 2005 | 502,683 | 3,817,358 | 705,989 | 654,722 | 201,138 | 230,286 | 729,112 |
| 2006 | 539,374 | 4,017,832 | 747,833 | 731,929 | 208,091 | 239,203 | 766,464 |
| 2007 | 560,825 | 4,233,395 | 786,190 | 745,813 | 204,781 | 239,026 | 796,118 |
| 2008 | 587,121 | 4,326,578 | 824,844 | 805,064 | 213,863 | 250,970 | 839,899 |
| 2009 | 577,300 | 4,326,767 | 818,941 | 766,018 | 204,089 | 242,858 | 788,453 |
| 2010 | 621,676 | 4,702,820 | 816,537 | 778,257 | 206,981 | 247,590 | 812,773 |
| 2011 | 640,755 | 4,537,944 | 841,635 | 783,094 | 211,214 | 262,362 | 849,657 |
| 2012 | 659,421 | 4,770,727 | 894,172 | 814,426 | 222,440 | 262,525 | 906,785 |
| % change 2003-2012 | 38.3% | 37.3% | 23.3% | 35.7% | 21.0% | 17.2% | 36.5% |

Source: United States Bureau of Labor Statistics, Quarterly Census of Employment and Wages, State and County Wages Database, available at: <http://www.bls.gov/cew/>

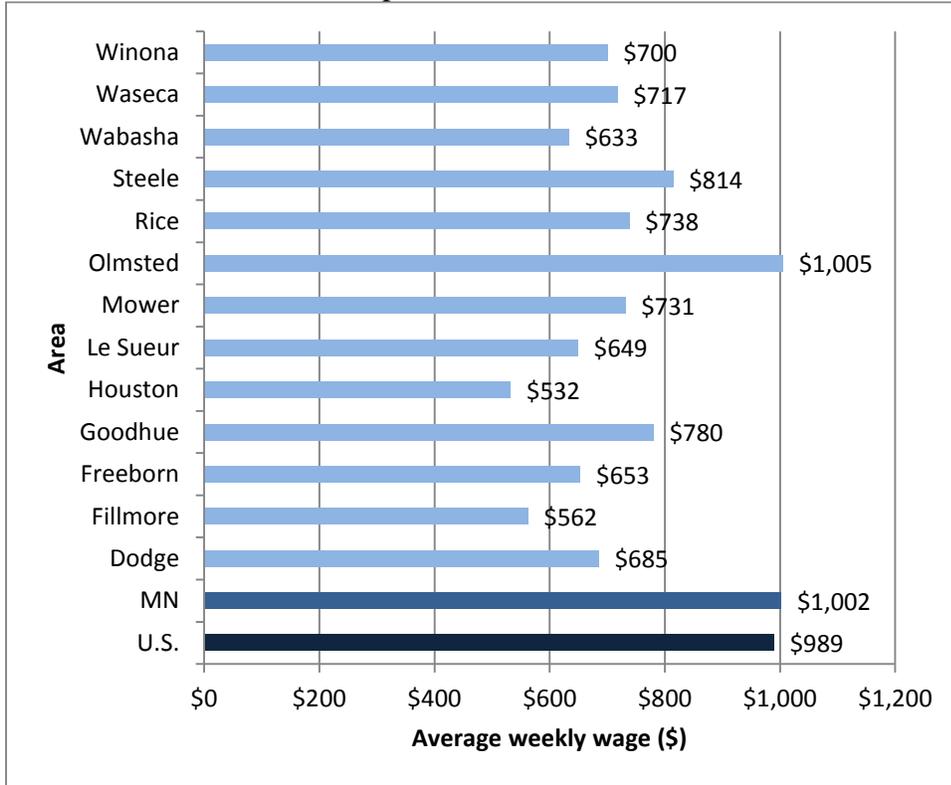
Table 13: Average weekly wage (in dollars) in the United States, Minnesota, and counties in the Southeast Landscape, 2003-2012; all industries, ownerships, and establishment sizes.

| Year | U.S. | MN | Dodge | Fillmore | Freeborn | Goodhue | Houston | Le Sueur |
|-------------------------------|-------|---------|-------|----------|----------|---------|---------|----------|
| 2003 | 726 | 742 | 572 | 463 | 513 | 582 | 452 | 510 |
| 2004 | 757 | 777 | 626 | 478 | 528 | 629 | 473 | 534 |
| 2005 | 782 | 785 | 599 | 462 | 527 | 627 | 465 | 530 |
| 2006 | 818 | 811 | 655 | 481 | 548 | 636 | 479 | 552 |
| 2007 | 855 | 853 | 655 | 509 | 566 | 654 | 497 | 562 |
| 2008 | 876 | 881 | 684 | 512 | 591 | 694 | 513 | 604 |
| 2009 | 876 | 872 | 651 | 522 | 610 | 696 | 524 | 584 |
| 2010 | 899 | 900 | 683 | 533 | 629 | 717 | 525 | 620 |
| 2011 | 924 | 920 | 681 | 550 | 641 | 729 | 524 | 640 |
| 2012 | 948 | 949 | 710 | 560 | 656 | 746 | 555 | 664 |
| % change 2003-2012 | 30.6% | 27.9% | 24.1% | 21.0% | 27.9% | 28.2% | 22.8% | 30.2% |
| Year | Mower | Olmsted | Rice | Steele | Wabasha | Waseca | Winona | |
| 2003 | 579 | 772 | 605 | 603 | 519 | 529 | 544 | |
| 2004 | 612 | 800 | 625 | 621 | 531 | 536 | 569 | |
| 2005 | 595 | 827 | 612 | 628 | 535 | 545 | 570 | |
| 2006 | 644 | 857 | 638 | 684 | 562 | 558 | 590 | |
| 2007 | 660 | 896 | 662 | 682 | 566 | 580 | 612 | |
| 2008 | 690 | 924 | 685 | 724 | 587 | 598 | 639 | |
| 2009 | 689 | 942 | 692 | 737 | 588 | 617 | 642 | |
| 2010 | 743 | 1038 | 704 | 740 | 601 | 629 | 670 | |
| 2011 | 765 | 990 | 719 | 724 | 601 | 657 | 682 | |

| | | | | | | | |
|---------------------------|-------|-------|-------|-------|-------|-------|-------|
| 2012 | 784 | 1009 | 753 | 725 | 625 | 691 | 703 |
| % change 2003-2012 | 35.4% | 30.7% | 24.5% | 20.2% | 20.4% | 30.6% | 29.2% |

Source: United States Bureau of Labor Statistics, Quarterly Census of Employment and Wages, State and County Wages Database, available at: <http://www.bls.gov/cew/>

Figure 4: Average weekly wage by county in the Southeast Landscape for the first quarter of 2013; all industries, ownerships, and establishment sizes.



Source: United States Bureau of Labor Statistics, Quarterly Census of Employment and Wages, State and County Wages Database, available at: <http://www.bls.gov/cew/>

Table 14: Household earnings for the United States, Minnesota, and counties in Southeast Minnesota, 2011.

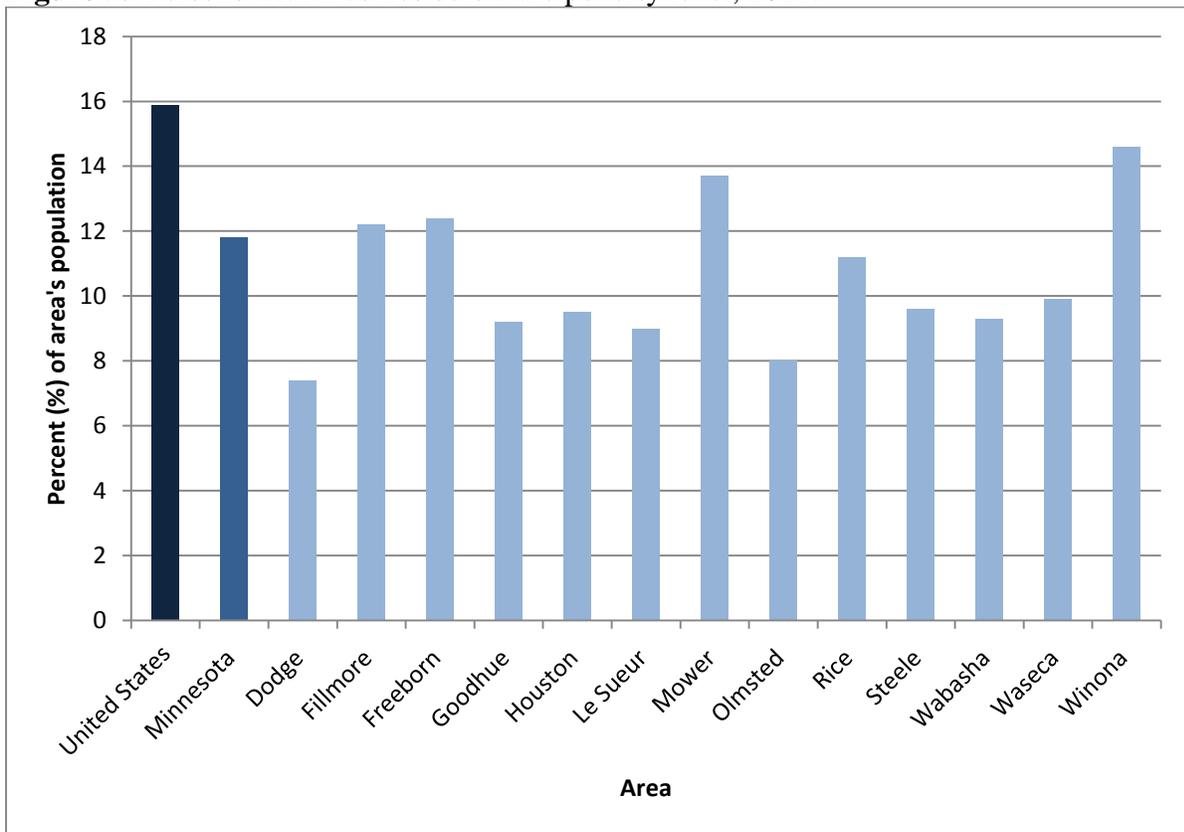
| | Estimate Median Household Income |
|----------------------|---|
| United States | \$50,502 |
| Minnesota | \$56,944 |
| Dodge | \$65,423 |
| Fillmore | \$47,241 |
| Freeborn | \$44,352 |
| Goodhue | \$54,724 |
| Houston | \$52,325 |
| Le Sueur | \$54,468 |
| Mower | \$46,860 |
| Olmsted | \$66,997 |
| Rice | \$56,781 |

| | |
|-------------------------------|----------|
| Steele | \$54,971 |
| Wabasha | \$53,899 |
| Waseca | \$52,660 |
| Winona | \$46,028 |
| Mean for Southeast MN* | |
| | \$53,595 |

Source: 2011 American Community Survey

*Inferred by taking the mean of the median household incomes for all thirteen counties in Southeast Minnesota

Figure 5: Persons with incomes below the poverty level, 2011.



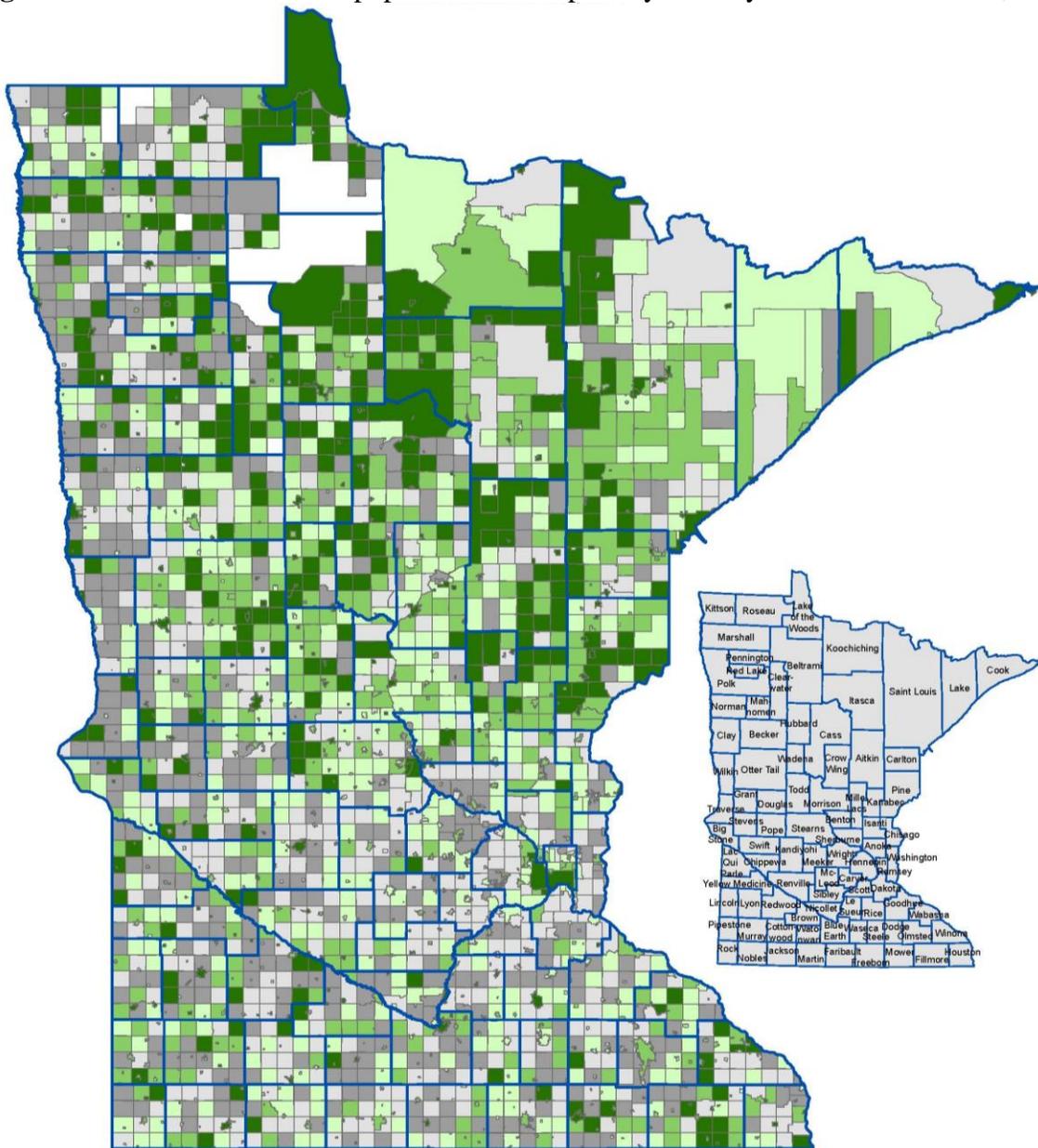
Source: U.S. Census Bureau, Small Area Income and Poverty Estimates

Table 15: Persons with incomes below the poverty level, 2011.

| | Pop. below poverty level | % of total population |
|----------------------|-------------------------------------|----------------------------------|
| United States | 48,452,035 | 15.9 |
| Minnesota | 617,185 | 11.8 |
| Dodge | 1,483 | 7.4 |
| Fillmore | 2,507 | 12.2 |
| Freeborn | 3,792 | 12.4 |
| Goodhue | 4,156 | 9.2 |
| Houston | 1,782 | 9.5 |
| Le Sueur | 2,462 | 9 |
| Mower | 5,303 | 13.7 |
| Olmsted | 11,429 | 8 |
| Rice | 6,422 | 11.2 |
| Steele | 3,476 | 9.6 |
| Wabasha | 1,992 | 9.3 |
| Waseca | 1,771 | 9.9 |
| Winona | 6,893 | 14.6 |

Source: U.S. Census Bureau, Small Area Income and Poverty Estimates

Figure 6: Percent of state-wide population below poverty level by minor civil division, 2010.

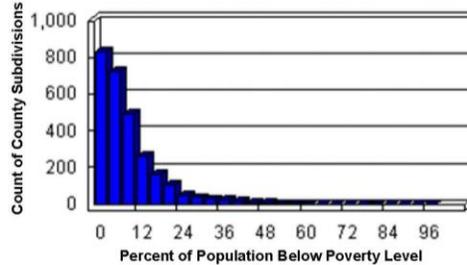


Statistics

Percent of Population Below Poverty by County Subdivision

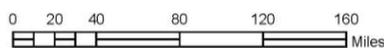
Count of County Subdivisions: 2,757
 Minimum: 0.0%
 Maximum: 100.0%
 Average/Mean: 9.3%
 Standard Deviation: 9.4%

Frequency Distribution



Percent of Population Below Poverty by County Subdivision

- 0% - 2.7%
- 2.8% - 5.4%
- 5.5% - 8.8%
- 8.9% - 14.1%
- 14.2% - 100%
- County Boundary



Source: 2010 American Community Survey 5-year Estimates, Minnesota Department of Health