

Demographic Data Report

2nd Generation Southeast Landscape Plan

MFRC Southeast Regional Landscape Committee

February 2014



Minnesota Forest Resources Council (MFRC)

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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

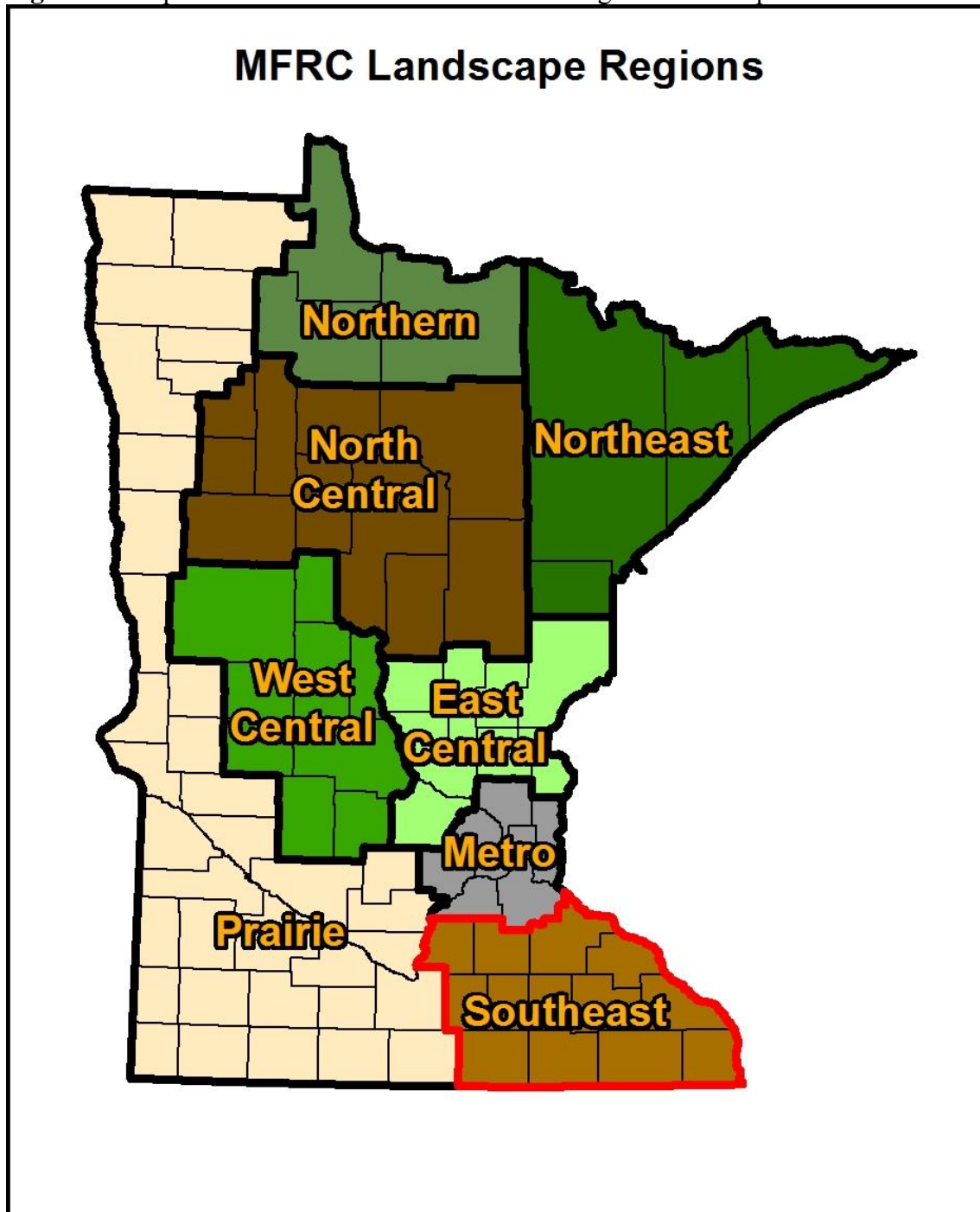
United States Census Bureau: www.census.gov; QuickFacts:
<http://quickfacts.census.gov/qfd/states/27000.html>

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

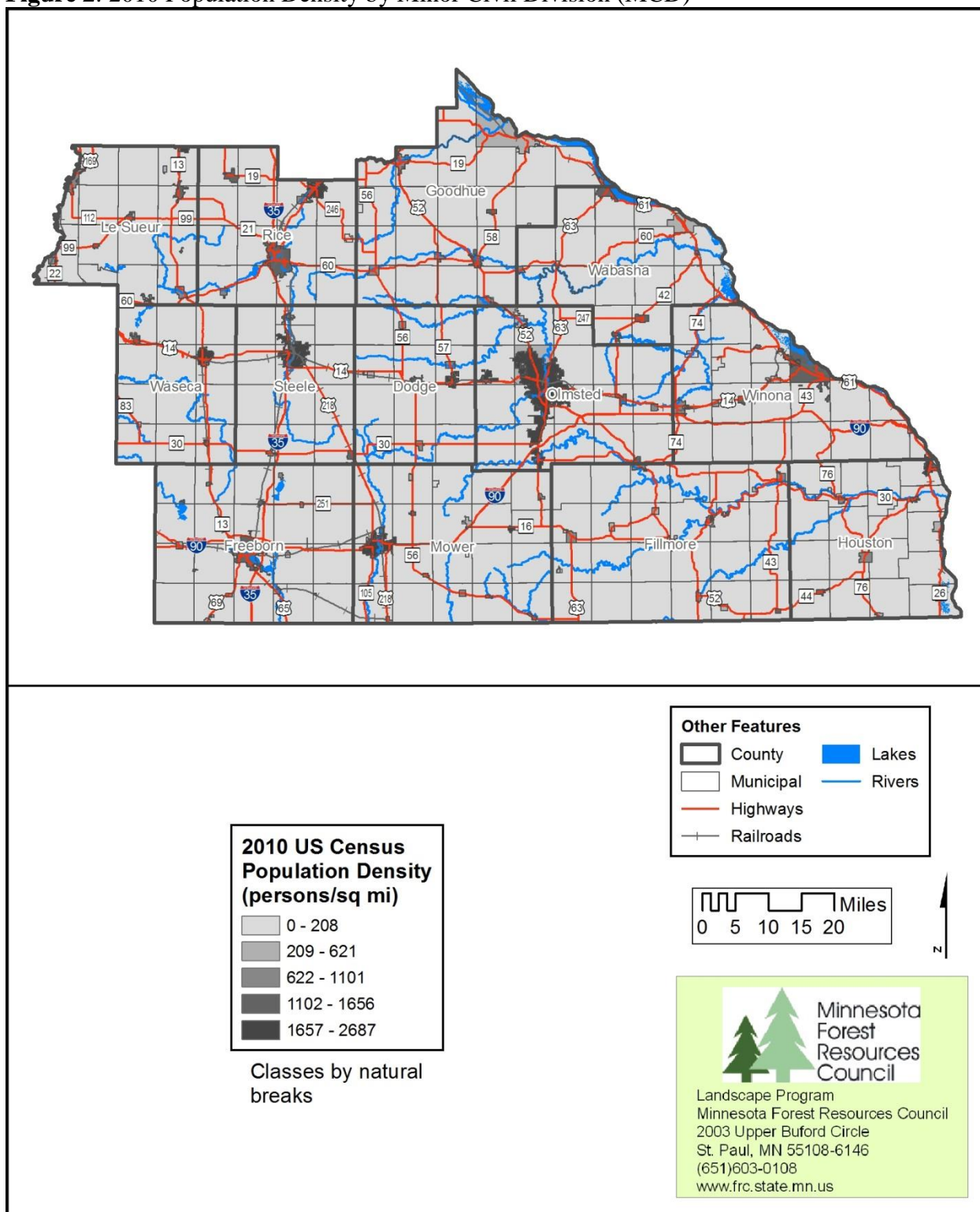
Overall, the Southeast Landscape contains less racial diversity than the state of Minnesota as a whole (Table 2). Exceptions include Olmsted County, which closely parallels Minnesota in terms of racial distribution and exceeds the state's average for percent of people of Asian descent, and Mower County 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.



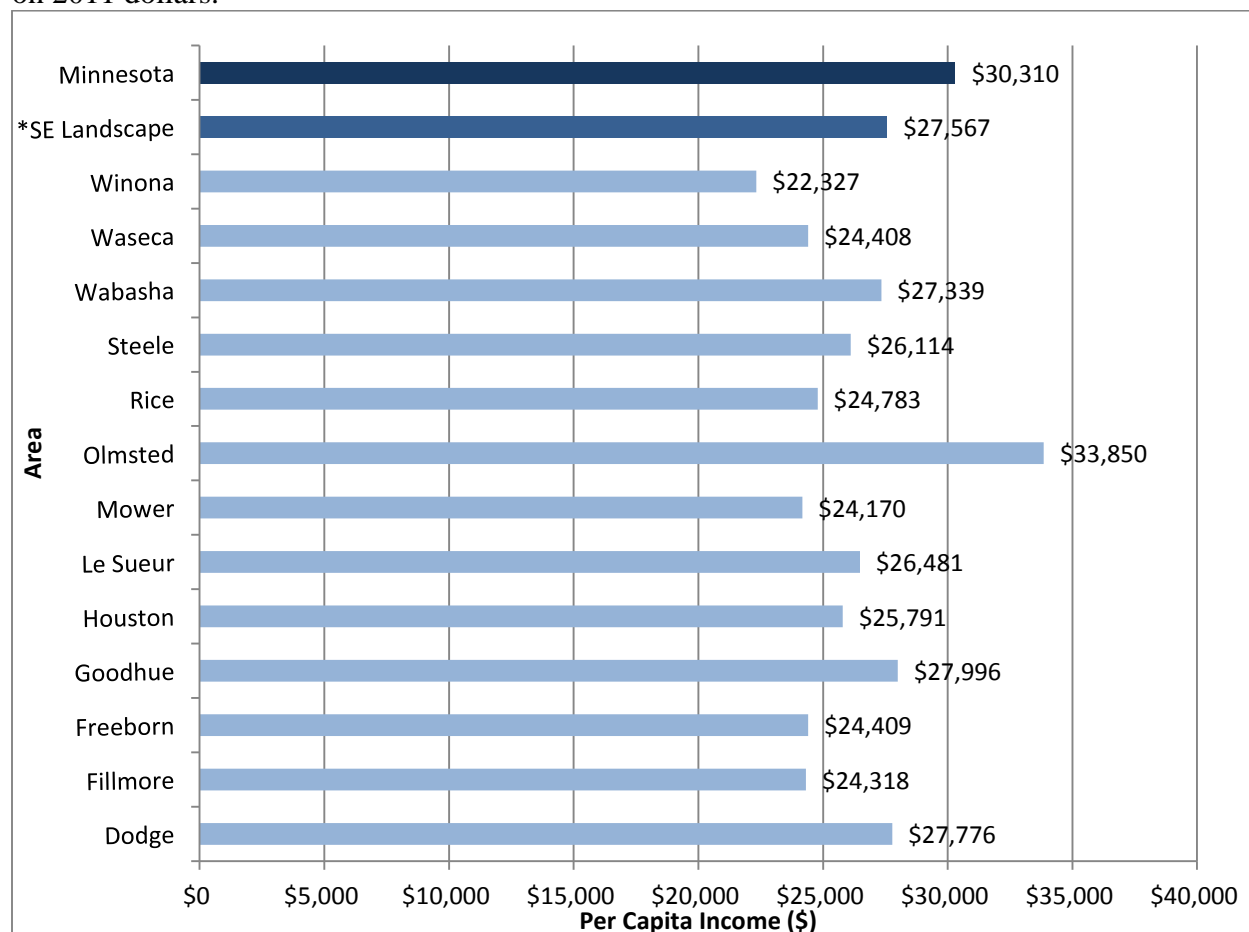
Earnings and Income Trends

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/>

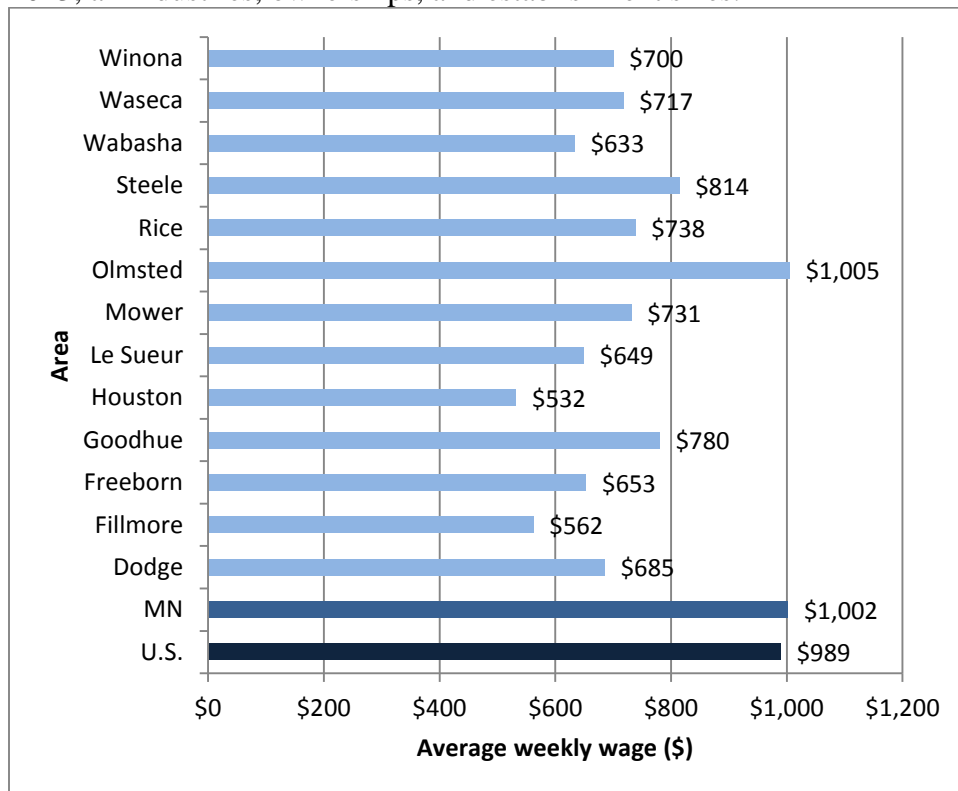
Table 13: Average weekly wage (in dollars) in the United States, Minnesota, and counties in the Southeast Landscape, 2003-2012; all industries, ownerships, and establishment sizes.

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.

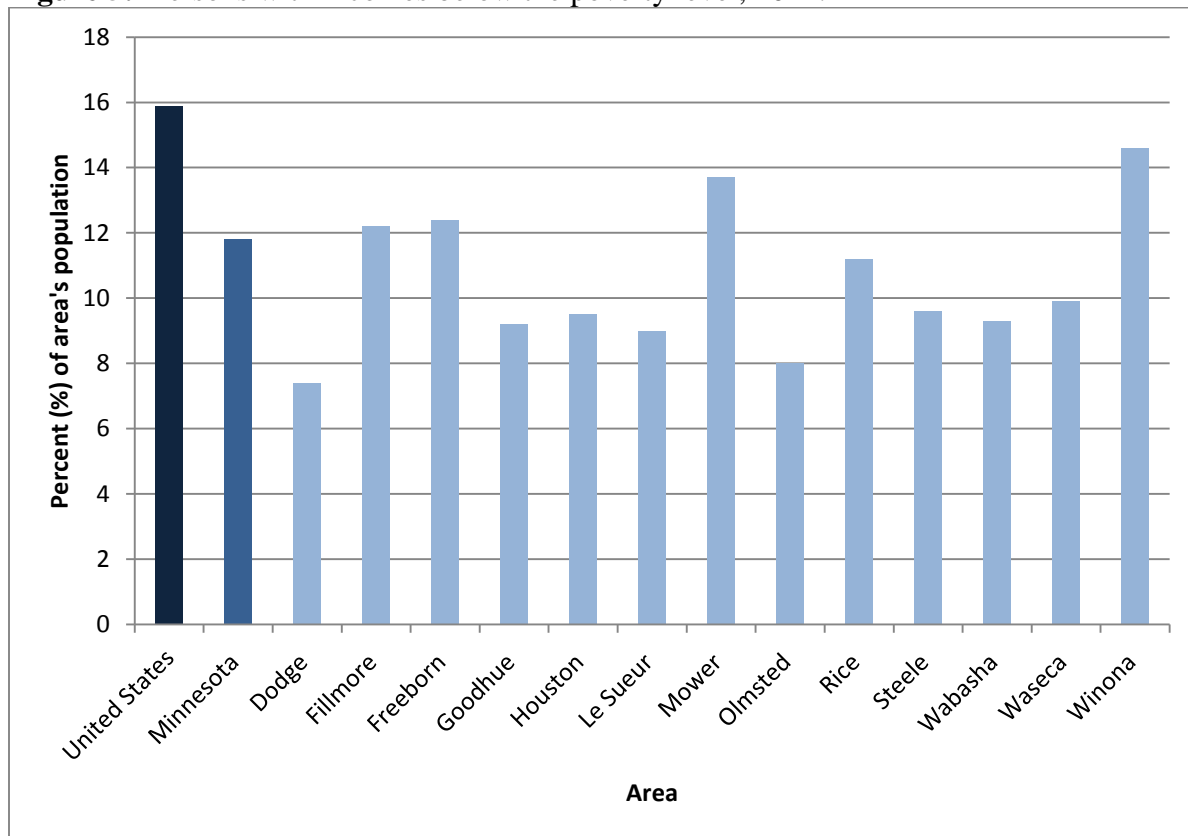
	Estimate Median Household Income
United States	\$50,502
Minnesota	\$56,944
Dodge	\$65,423
Fillmore	\$47,241
Freeborn	\$44,352
Goodhue	\$54,724
Houston	\$52,325
Le Sueur	\$54,468
Mower	\$46,860
Olmsted	\$66,997
Rice	\$56,781

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.



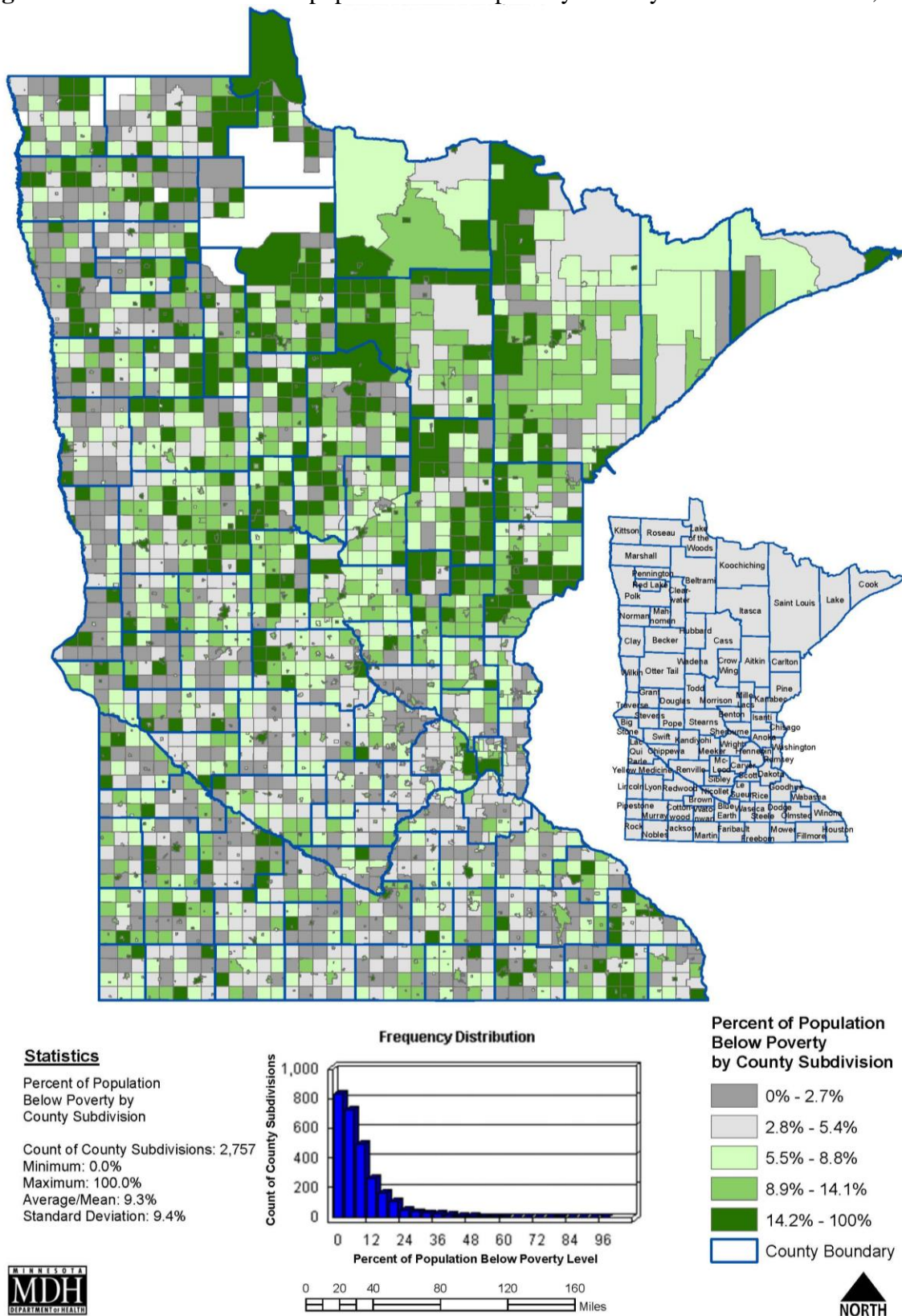
Source: U.S. Census Bureau, Small Area Income and Poverty Estimates

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.



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