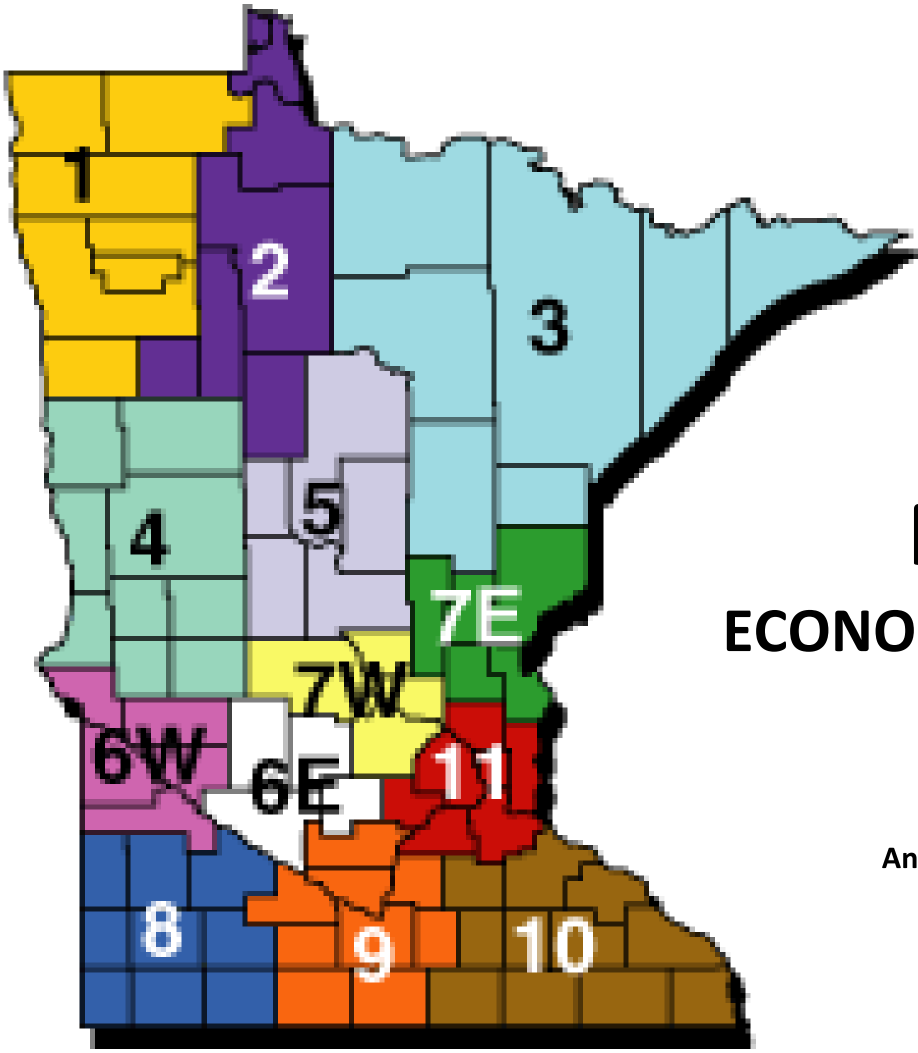

TWIN CITIES METRO AREA

ECONOMIC DEVELOPMENT REGION 11

Covers counties:

Anoka, Carver, Dakota, Hennepin, Ramsey Scott, and Washington

2023 REGIONAL PROFILE

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DEMOGRAPHICS

POPULATION CHANGE

The Twin Cities Metro Area planning region includes a total of seven counties, covering one Economic Development Region (EDR 11) and six Workforce Development Boards (WDBs). In sum, the Metro Area was home to 3,149,205 people in 2022, comprising 55.1% of the state's total population. The region's population grew by 10.5% between 2010 and 2022, adding just under 300,000 people. In comparison, the state of Minnesota witnessed a 7.8% population gain. Altogether, the Metro Area accounted for 72.5% of the state's total population growth between 2010 and 2022 (see Table 1).

Table 1. Population Change 2010-2022

	2010 Population	2022 Estimates	*2010-2022 Change*	
			Number	*Percent*
Region 11	**2,849,567**	**3,149,205**	***+299,638***	***+10.5%***
Anoka County	330,844	368,864	*+38,020*	*+11.5%*
Carver County	91,042	110,034	*+18,992*	*+20.9%*
Dakota Co.	398,552	443,341	*+44,789*	*+11.2%*
Hennepin Co.	1,152,425	1,260,121	*+107,696*	*+9.3%*
Ramsey Co.	508,640	536,413	*+27,773*	*+5.5%*
Scott Co.	129,928	154,520	*+24,592*	*+18.9%*
Washington County	238,136	275,912	*+37,776*	*+15.9%*
State of Minnesota	**5,303,925**	**5,717,184**	***+413,259***	***+7.8%***

Source: U.S. Census Bureau, Population Estimates Program

Since 2010, all seven counties in the metro have witnessed population increases. Hennepin County, Minnesota's most populous county, gained the most people between 2010 and 2022. In fact, by adding nearly 107,700 people during that period, Hennepin County accounted for fully one-third (35.9%) of the Metro Area's total growth, and fully one quarter (26.6%) of the state's total growth. Meanwhile, Carver County and Scott County were the fastest- and second-fastest growing counties in the state between 2010 and 2022, growing respectively by 20.9% and 18.9%. Washington County has also witnessed very rapid population growth since 2010, growing by 15.9% (Table 1).

COMPONENTS OF POPULATION CHANGE

The Twin Cities Metro Area experienced a natural increase – more births than deaths – of over 25,000 people between 2020 and 2022. It should be noted, however, that the average annual number of deaths during this period (28,349) were significantly higher than the average annual number of deaths between 2010 and 2019 (19,975). This is likely due to both an aging population and the impacts of COVID-19. The average annual number of births between 2020 and 2022 (40,870) were about even with the annual average between 2010 and 2019 (40,377).

Table 2. Estimates of the Components of Population Change, 2020-2022

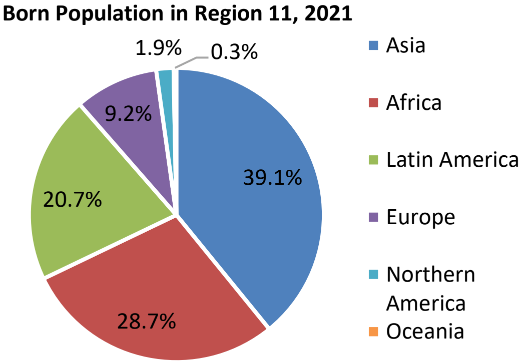
	Total Change	*Natural Increase*	Vital Events		Net Migration		
			Births	Deaths	*Total*	*Inter-national*	*Domestic*
Region 11	*-13,908*	*+25,042*	81,739	56,697	*-39,326*	*+14,054*	*-53,380*
Minnesota	*+10,680*	*+26,917*	144,350	117,433	*-17,365*	*+20,012*	*-37,377*

Source: U.S. Census Bureau, Population Estimates Program

While the Metro Area did see a natural increase in population between 2020 and 2022, there was a significant drop in net migration (-39,326 people). This was solely due to a loss of 53,380 people to domestic migration patterns. The region did witness over 14,000 additional international immigrants during this period. Historically, the region gained about 9,500 international immigrants per year between 2010 and 2019 (Table 2).

As of 2021, the Metro Area had nearly 377,200 foreign-born residents, making up approximately 12.0% of the region's total population. Over three-quarters (78.7%) of the state's foreign-born population lives in the Metro Area. The largest shares of foreign-born persons in the Metro Area are originally from Asia (39.1%), Africa (28.7%), and Latin American (20.7%) (Figure 1). Over the past decade, between 2010 and 2021, the region's foreign-born population increased by 85,090 people (+29.1%). The most significant growth came with residents from eastern Africa (+30,074 people), south central Asia (+14,565 people), western Africa (+13,932 people), and southeastern Asia (+12,544 people).

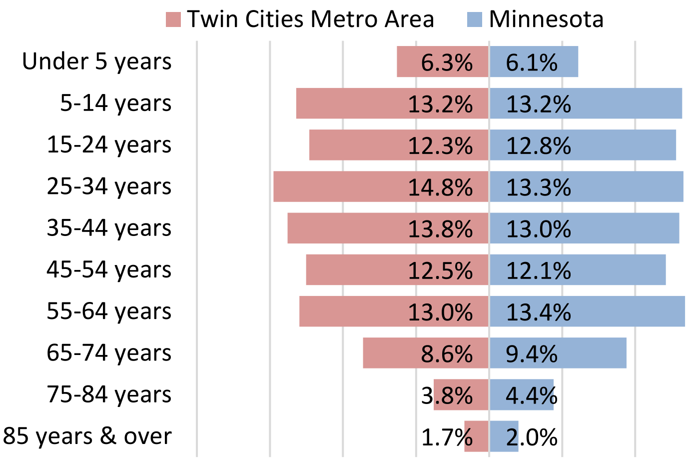
Figure 1. Place of Birth for the Foreign Born Population in Region 11, 2021



POPULATION BY AGE GROUP

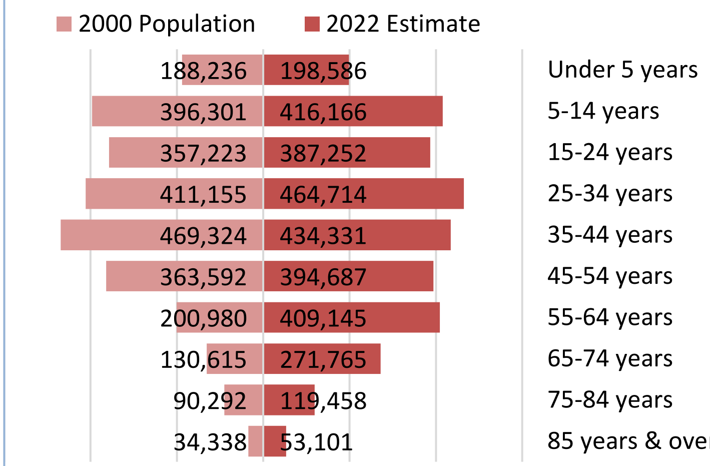
Overall, the Twin Cities Metro Area has a slightly younger population than the rest of the state, with 14.1% of residents aged 65 years and over, compared to 15.8% statewide. Consequently, the Metro Area has a higher percentage of people in the 25- to 54-year-old age group, typically considered the "prime working years." The share of school-aged children in the Metro Area and Minnesota is similar (Figure 2).

Figure 2. Percentage of Population by Age Group, 2022



Source: 2022 Population Estimates

Figure 3. Region 11 Population Pyramid, 2000-2022



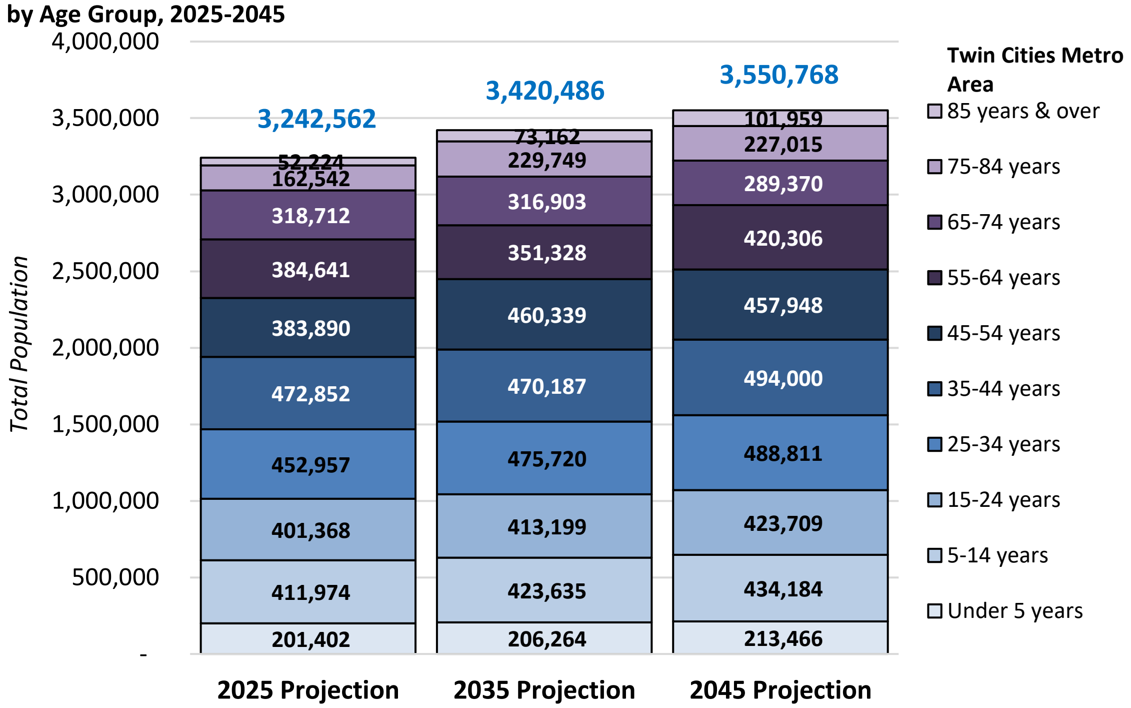
Source: 2022 Population Estimates

A large portion of the region's population is a part of the Baby Boomer generation, or those people born between 1946 and 1964, which is creating a significant shift in the population over time. Where the number of residents between the ages of 35 and 44 years declined between 2000 and 2022 (-35,000; -7.5%), the number of residents aged 55 years and over increased dramatically (+397,200; +87.1%) (Figure 3).

POPULATION PROJECTIONS BY AGE

According to population projections from the [State Demographic Center](), the Twin Cities Metro Area is expected to gain an estimated 308,200 residents between 2025 and 2045, a 9.5% increase (Figure 4). This projected gain is moderately higher than the state's, which is projected to grow by 7.4% during that time. Rapid growth is expected for older age cohorts in the region and state.

Figure 4. Region 11 - Twin Cities Population Projections by Age Group, 2025-2045



Source: Minnesota State Demographic Center

POPULATION BY RACE

The Twin Cities Metro Area has a much more diverse population than the state overall, and it continues to become more diverse over time. In 2021, 73.7% of the region's residents reported white alone as their race, compared to 80.7% of residents statewide. The region had especially higher concentrations of those reporting as Black or African American and Asian or Other Pacific Islander than the state overall. Beyond a smaller share of those reporting as white alone, the Metro Area also had a slightly smaller share of those reporting as American Indian or Alaska Native than the state (Table 3). Since 2011, those reporting Two or More Races and Some Other Race had the most rapid growth.

Table 3. Race and Hispanic Origin, 2021	Region 11 Twin Cities Metro Area				Minnesota	
	Number	Percent	*Change from 2011-2021 Numeric*	*Percent*	Percent	*Change from 2011-2021*
Total	**3,136,376**	**100.0%**	***+303,226***	***+10.7%***	**100.0%**	***+7.4%***
White	2,311,935	73.7%	*+37,883*	*+1.7%*	80.7%	*+0.4%*
Black or African American	313,299	10.0%	*+83,565*	*+36.4%*	6.6%	*+42.2%*
American Indian & Alaska Native	16,230	0.5%	*-2,839*	*-14.9%*	0.9%	*-8.0%*
Asian & Other Pac. Islander	244,845	7.8%	*+65,186*	*+36.3%*	5.0%	*+35.8%*
Some Other Race	82,538	2.6%	*+30,757*	*+59.4%*	2.1%	*+66.5%*
Two or More Races	167,529	5.3%	*+88,674*	*+112.5%*	4.6%	*+121.8%*
Hispanic or Latino origin	206,457	6.6%	*+44,242*	*+27.3%*	5.6%	*+31.6%*

Source: U.S. Census Bureau, 2017-2021 American Community Survey

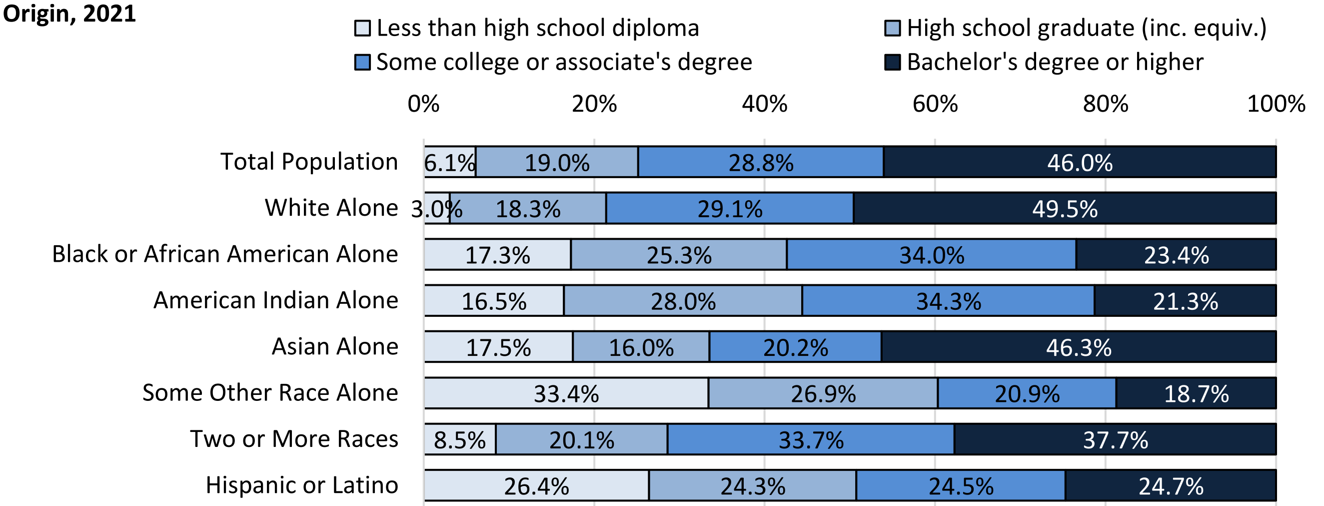
EDUCATIONAL ATTAINMENT

The Twin Cities Metro Area has more residents with higher educational attainment than the state overall. For example, 73.2% of those living in the Metro Area (that are 18 years of age and older) have attended a post-secondary institution or have obtained a degree. That includes 43.1% of the region's population with a bachelor's degree or more. Comparatively, 68.4% of the state's total population 18 years of age and older have attended a post-secondary institution, with 34.9% having a bachelor's degree or more (Table 4).

Table 4. Educational Attainment for the Adult Population, 2021	Region 11		Minnesota
	Number	Percent	Percent
Total, 18 years & over	**2,400,233**	**100.0%**	**100.0%**
Less than high school	162,335	6.8%	7.1%
High school graduate (incl. equiv.)	481,369	20.1%	24.5%
Some college, no degree	494,502	20.6%	22.4%
Associate degree	228,325	9.5%	11.1%
Bachelor's degree	681,647	28.4%	23.3%
Advanced degree	352,055	14.7%	11.6%

Source: U.S. Census Bureau, 2017-2021 American Community Survey

Figure 5. Region 11 Educational Attainment for the population aged 25 years & over by Race or Origin, 2021



Source: 2017-2021 American Community Survey

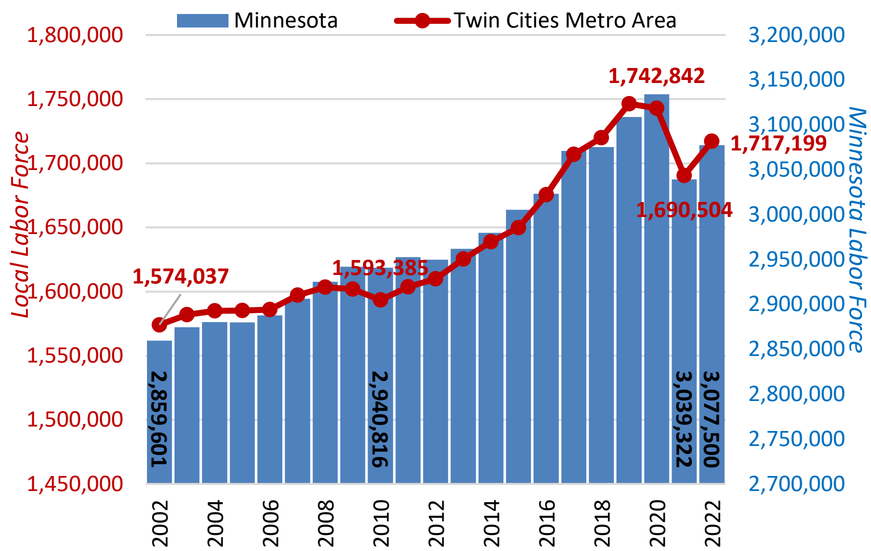
Educational attainment varied significantly by race and ethnicity in the Metro Area. For example, where 97.0% of the white alone population 25 years and over reported having at least a high school diploma or equivalent, such figures were 66.6% for those reporting as some other race and 73.6% for those reporting Hispanic or Latino origins (Figure 5).

LABOR FORCE

LABOR FORCE CHANGE

According to data from DEED's Local Area Unemployment Statistics program, the Twin Cities Metro Area's labor force has responded dramatically to the COVID-19 pandemic and recovery. After adding over 153,000 people (1.1% average annual growth) between 2010 and 2019, the region's labor force dropped by over 52,300 people (3.0%) between 2020 and 2021. Between 2021 and 2022, the region's labor force rebounded by nearly 26,700 people (1.6%) to an estimated 1,717,200 people.

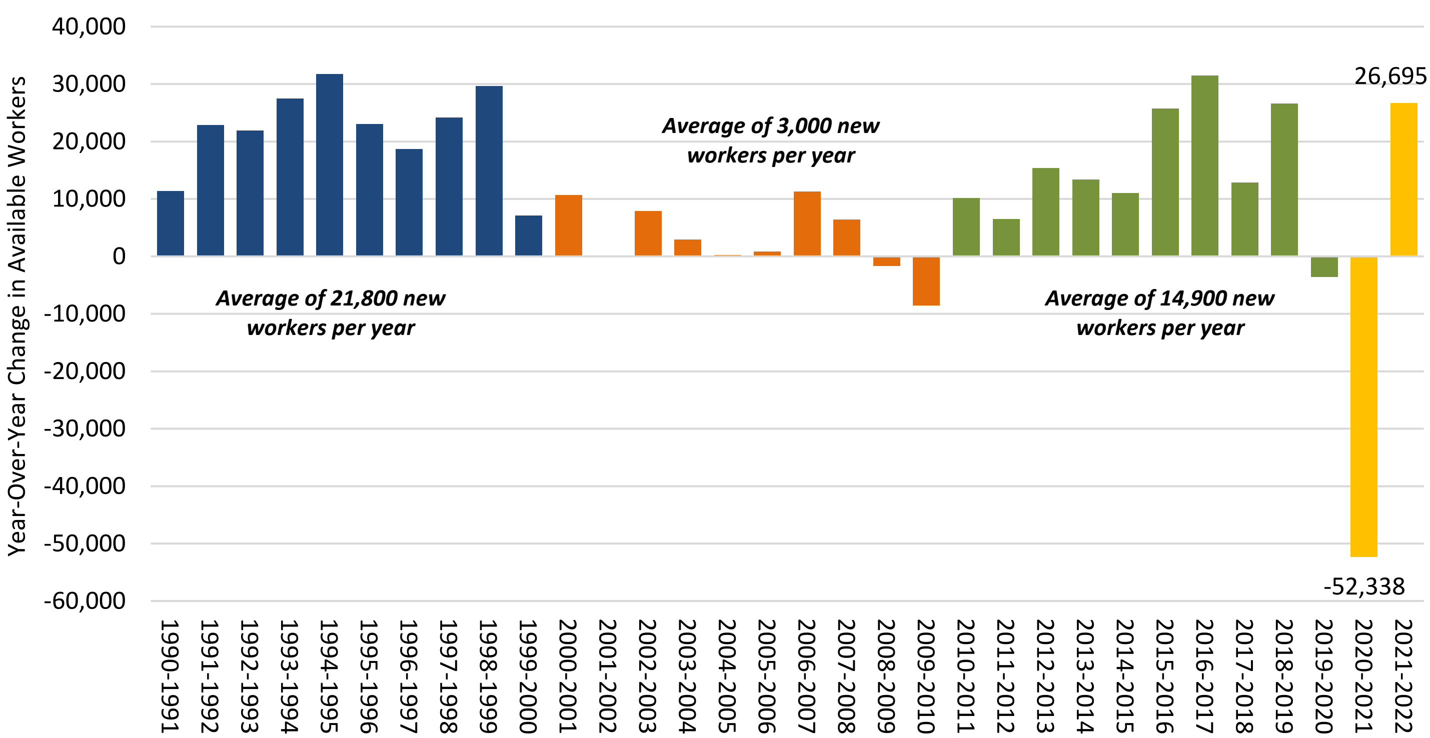
Figure 6. Annual Labor Force Estimates, 2002-2022



Source: DEED Local Area Unemployment Statistics (LAUS) program

Looking back over the past three decades, the Metro Area's labor force has witnessed longer-term expansions and contractions. Between 1990 and 2000, for example, the region's labor force added an average of nearly 21,800 people per year (1.6% average annual growth rate). Between 2000 and 2010, labor force growth barely managed 3,000 per year (0.2% average annual growth rate). Since 2010, labor force growth has picked up again, adding an average of about 10,300 people per year (0.6% average annual growth). This accounts, of course, for the large swings in the region's labor force between 2020 and 2022 (Figure 6 and Figure 7).

Figure 7. Region 11 Twin Cities Annual Change in Labor Force, 1990-2022



Source: DEED Local Area Unemployment Statistics (LAUS)

LABOR FORCE PROJECTIONS

If the Twin Cities Metro Area's population changes at the projected rates shown in Figure 4 above, the region would be expected to see a moderate increase in the labor force over the next decade. Applying current labor force participation rates to future population projections by age group creates labor force projections for the region, which show a steady 4.3% increase in workforce numbers between 2025 and 2035 (Table 5). This assumes the region's continued recovery from COVID-19's impact on its labor force size (Figure 6).

Table 5. Region 11 Labor Force Projections

	2025 Labor Force Estimate	2035 Labor Force Projection	*2025-2035 Change*	
			Numeric	*Percent*
16 to 19 years	83,076	82,146	*-930*	*-1.1%*
20 to 24 years	160,292	172,127	*+11,835*	*+7.4%*
25 to 44 years	828,595	846,582	*+17,988*	*+2.2%*
45 to 54 years	338,099	405,429	*+67,330*	*+19.9%*
55 to 64 years	287,008	262,150	*-24,857*	*-8.7%*
65 to 74 years	93,915	93,382	*-533*	*-0.6%*
75 years & over	14,978	21,126	*+6,147*	*+41.0%*
Total Labor Force	**1,805,962**	**1,882,942**	***+76,980***	***+4.3%***

Source: calculated from Minnesota State Demographic Center population projections and 2017-2021 American Community Survey 5-Year Estimates

In addition to the overall increase, the labor force will also see a significant shift over time, with large percentage gains in the number of workers aged 65 years and over. These gains will come as the share of workers between 55 and 64 years is anticipated to decrease. At the other end of the age spectrum, the region is expected to see significant gains in the number of workers between the ages of 25 and 54 years old. Currently, those workers between the ages of 25 and 54, or those in their "prime-working years" make up 64.6% of the Metro Area's total labor force. By 2035, this age cohort will account for about 66.5% of the region's total labor force. Employers in the area will need to respond to such shifts creatively.

EMPLOYMENT CHARACTERISTICS

With 71.6% of the working age population aged 16 years and over in the labor force, the Metro Area had a slightly higher labor force participation rate than the state's 69.2% rate. The labor force participation rate is the share of both the employed and unemployed over the civilian noninstitutional population. In terms of unemployment, the Metro Area's overall rate of 4.1% in 2021 was nearly equal to the state's respective rate of 4.0% (Table 6). At the time, this represented approximately 72,900 unemployed persons in the region.

Table 6. Employment Characteristics, 2021

	Region 11			Minnesota	
	In Labor Force	Labor Force Partic. Rate	Unemp. Rate	Labor Force Partic. Rate	Unemp. Rate
Total Labor Force	**1,777,042**	**71.6%**	**4.1%**	**69.2%**	**4.0%**
16 to 19 years	77,028	49.6%	12.7%	52.3%	10.7%
20 to 24 years	156,784	83.5%	7.3%	83.3%	6.7%
25 to 44 years	801,364	89.5%	3.5%	88.8%	3.6%
45 to 54 years	346,192	88.1%	2.9%	87.6%	3.0%
55 to 64 years	304,048	74.6%	3.5%	73.1%	3.2%
65 to 74 years	79,755	29.5%	3.4%	28.0%	3.2%
75 years & over	11,986	7.0%	3.3%	6.6%	2.9%
Employment Characteristics by Race & Hispanic Origin					
White alone	1,359,311	71.0%	3.4%	68.5%	3.4%
Black or African American	158,508	73.1%	8.2%	71.9%	8.6%
American Indian & Alaska Nat.	7,508	59.7%	8.4%	57.4%	12.9%
Asian or Other Pac. Islanders	133,630	73.1%	4.0%	72.7%	4.1%
Some Other Race	45,109	77.1%	6.6%	75.8%	6.2%
Two or More Races	73,000	76.5%	7.3%	74.1%	7.3%
Hispanic or Latino	108,544	78.3%	6.0%	77.0%	6.6%
Employment Characteristics by Veteran Status					
Veterans, 18 to 64 years	51,020	83.3%	3.9%	80.6%	3.9%
Employment Characteristics by Disability					
With Any Disability	85,732	55.5%	10.3%	53.6%	9.9%
Employment Characteristics by Educational Attainment					
Population, 25 to 64 years	1,451,321	85.6%	3.4%	84.4%	3.4%
Less than H.S. Diploma	67,144	67.1%	4.7%	66.6%	4.6%
H.S. Diploma or Equivalent	225,235	77.9%	2.8%	77.3%	2.5%
Some College or Assoc. Deg.	417,748	85.5%	4.1%	85.1%	3.6%
Bachelor's Degree or Higher	741,791	90.7%	2.2%	90.3%	2.1%

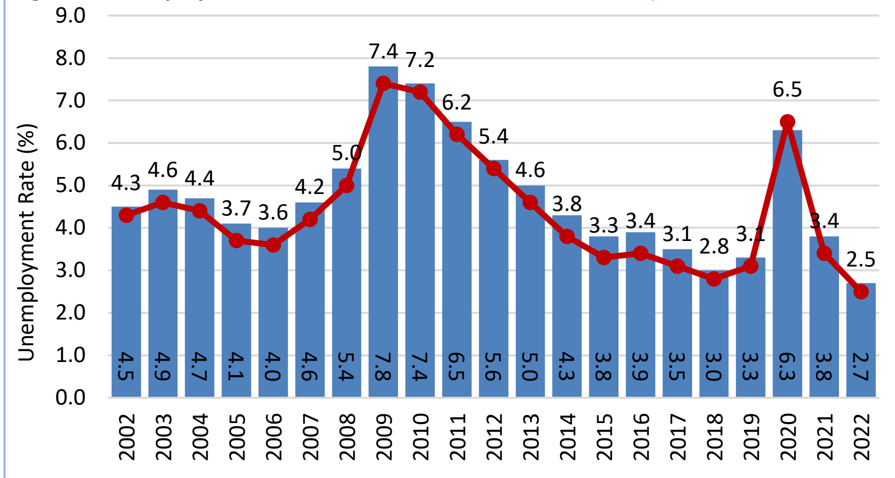
Source: 2017-2021 American Community Survey, 5-Year Estimates

Labor force participation and unemployment varies significantly by age, race and ethnicity, veteran status, disability status, and educational attainment in the Metro Area. For example, labor force participation for teenagers 16 to 19 years old is much lower (49.6%), along with having much higher unemployment (12.7%). Similarly, labor force participation for those with reported disabilities is much lower (55.5%), along with having much higher unemployment (10.3%). With the return of very tight labor market conditions across the region and state, these are two populations that employers can focus on more to fill workforce needs. The same goes for those with less educational attainment, where those with less than a high school diploma have lower labor force participation (67.1%), along with higher unemployment (4.7%). Unemployment is typically higher for populations of color as well.

UNEMPLOYMENT RATES

According to Local Area Unemployment Statistics, the Metro Area has had a historically lower unemployment rate than Minnesota and the nation, regardless of the state of the economy. As of annual 2022, the Metro Area's unemployment rate stood at 2.5%, which represented approximately 42,600 unemployed persons. Minnesota's unemployment rate of 2.7% during that time represented approximately 82,600 people (Figure 8). As such, just over half of the state's unemployed persons resided within the Twin Cities Metro Area in 2022. On a monthly basis, the Metro Area's unemployment rate spiked during the COVID-19 pandemic at 11.9% in May 2020. This represented approximately 204,100 unemployed persons. Unemployment since that time has gradually declined, reaching historic lows in the spring months of 2022. In April 2022, for example, the unemployment rate in the region dropped to 1.9%, which represented approximately 32,500 unemployed persons. This was the lowest unemployment the region has experienced since 1998, when the labor force size was about 166,600 persons smaller. Unemployment in the region rose to 3.1% through the summer months of 2023, representing approximately 54,800 unemployed persons.

Figure 8. Unemployment Rates, 2002-2022

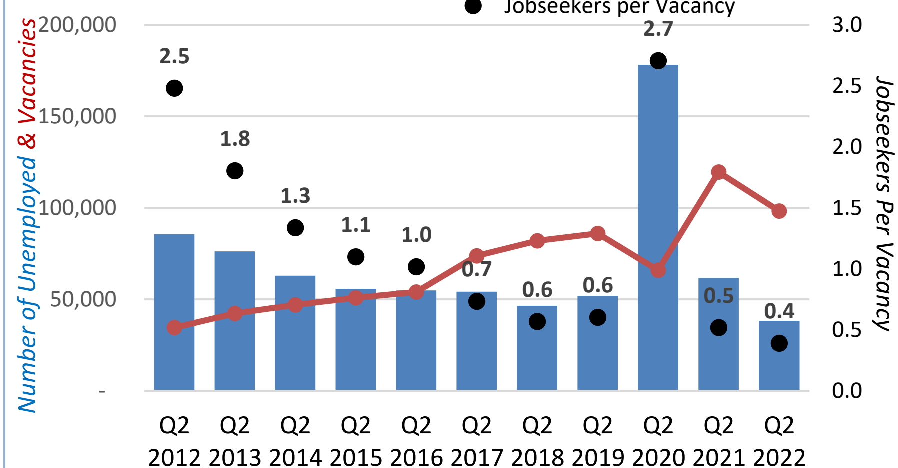


Source: DEED Local Area Unemployment Statistics (LAUS) program

JOBSEEKERS PER VACANCY

Recovering from the impacts of COVID-19, the Metro Area's labor market continues to tighten. One clear demonstration of this was how the region quickly reverted to 0.5 unemployed persons per job vacancy during Q2 2021 after spiking to 2.7 unemployed persons per job vacancy during Q2 2020. Job vacancies dipped slightly between 2021 and 2022, but the number of unemployed persons per job vacancy remained low, at 0.4 (Figure 9).

Figure 9. Jobseekers Per Vacancy, 2012-2022



Source: DEED Job Vacancy Survey, LAUS program

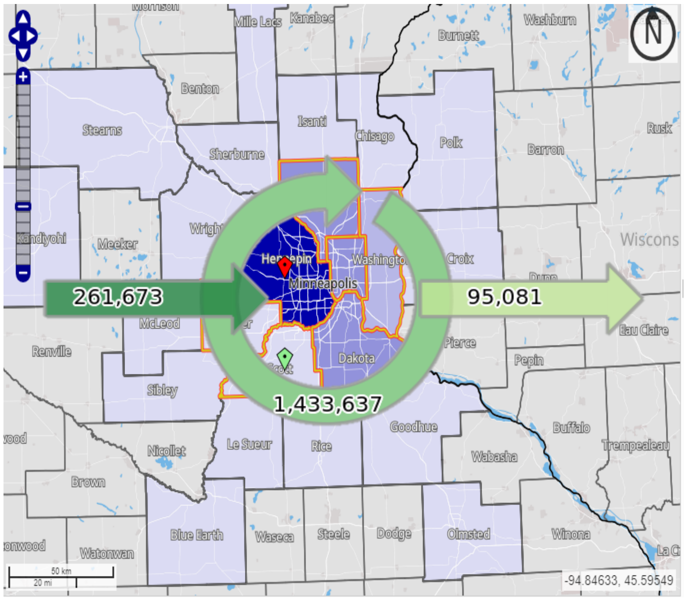
COMMUTE SHED AND LABOR SHED, 2020

According to commuting data from the U.S. Census Bureau, the vast majority – about 94% – of workers who live in the Twin Cities Metro Area also work within the region. There is no doubt that the Metro Area is a net importer of labor, having more jobs than available workers. In sum, about 1,433,600 workers both lived and worked in the Metro Area in 2020, while over 261,700 workers drove into the region for work, compared to about 95,100 workers who lived in the region but drove to surrounding counties for work (Table 7 and Figure 10).

Table 7. Region 11 Inflow/Outflow Job Counts (All Jobs), 2020	2020	
	Count	Share
Employed in the Selection Area	1,695,310	100.0%
Employed in the Selection Area but Living Outside	261,673	15.4%
Employed and Living in the Selection Area	1,433,637	84.6%
Living in the Selection Area	1,528,718	100.0%
Living in the Selection Area but Employed Outside	95,081	6.2%
Living and Employed in the Selection Area	1,433,637	93.8%

Source: U.S. Census Bureau, OnTheMap

Figure 10. Region 11 Labor and Commute Shed, 2020



Jobs Counts by Counties Where Workers Live - All Jobs

	2020 Count	2020 Share
All Counties	1,695,310	100.0%
Hennepin County, MN	582,082	34.3%
Ramsey County, MN	237,144	14.0%
Dakota County, MN	199,889	11.8%
Anoka County, MN	170,827	10.1%
Washington County, MN	121,638	7.2%
Scott County, MN	71,985	4.2%
Carver County, MN	50,072	3.0%
Wright County, MN	41,691	2.5%
Sherburne County, MN	26,340	1.6%
St. Croix County, WI	21,432	1.3%
Chisago County, MN	17,869	1.1%
Rice County, MN	11,890	0.7%
Isanti County, MN	11,389	0.7%
Stearns County, MN	8,625	0.5%
Olmsted County, MN	7,373	0.4%
Goodhue County, MN	7,088	0.4%
St. Louis County, MN	6,580	0.4%
Le Sueur County, MN	5,935	0.4%
Polk County, WI	5,518	0.3%
McLeod County, MN	5,041	0.3%
Crow Wing County, MN	3,643	0.2%
Blue Earth County, MN	3,466	0.2%
Kandiyohi County, MN	2,436	0.1%
Sibley County, MN	2,405	0.1%
Mille Lacs County, MN	2,270	0.1%
All Other Locations	70,682	4.2%

For those living in the Twin Cities Metro Area, top work destinations include Minneapolis, St. Paul, Bloomington, Eden Prairie, Plymouth, Eagan, Edina, and Minnetonka. Nearly one-in-five Metro Area residents work in Minneapolis alone, with about one-in-ten working in St. Paul. Zooming out, just over half (51.3%) of Twin Cities' residents work in Hennepin County, with nearly one-fifth (17.6%) working in Ramsey County (Figure 10). For those outside residents commuting into the region for work, top origins include Wright County, Sherburne County, and St. Croix County, WI.

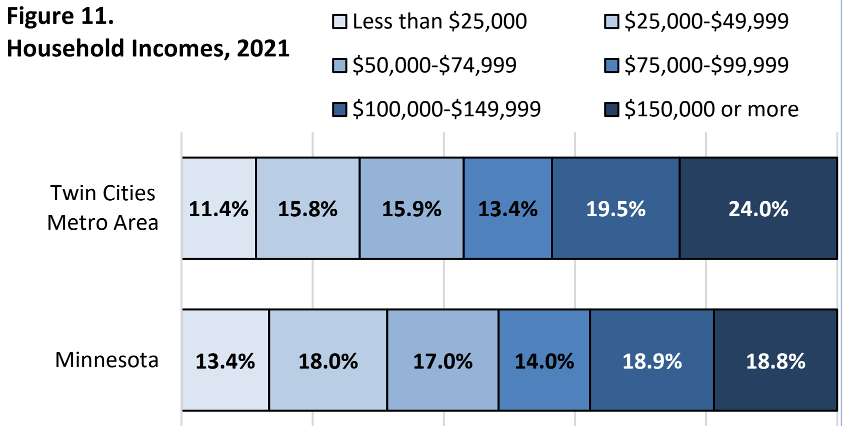
INCOMES, WAGES AND OCCUPATIONS

HOUSEHOLD INCOMES

As of 2021, household incomes were significantly higher in the Twin Cities Metro Area than they were for the rest of the state. The median household income in the Metro Area was $87,542 in 2021, which was 12.7% higher than Minnesota's median household income of $77,706. Even so, over one-quarter (27.2%) of the households in the region had incomes below $50,000 in 2021, compared to 31.4% of such households statewide (Figure 11). Median household incomes ranged from $71,494 in Ramsey County to over $100,000 in Washington, Carver, and Scott counties.

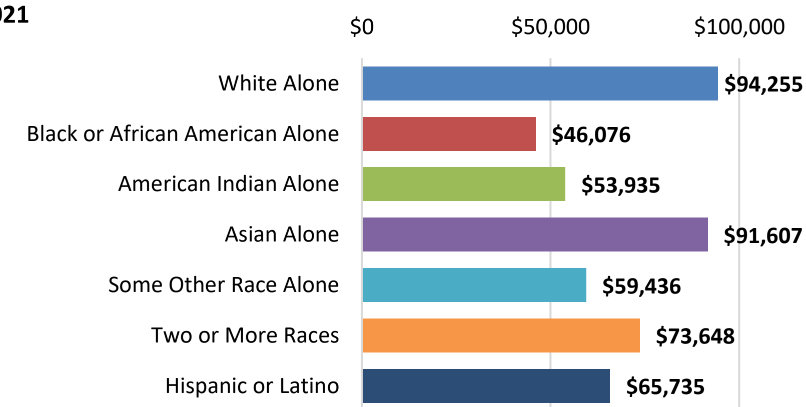
Median household incomes varied significantly by race and ethnicity in the region. Black or African American households reported the lowest incomes in the Metro Area, with a median household income ($46,076) that was about $48,200 lower than the respective median household income for white households ($94,255) (Figure 12). Only those reporting as white or Asian had median household incomes close to or above the median household income for the total of all households in the Twin Cities Metro Area.

Figure 11. Household Incomes, 2021



Source: 2017-2021 American Community Survey 5-Year Estimates

Figure 12. Region 11 Median Household Income by Race, 2021



Source: 2017-2021 American Community Survey
Note, American Indian for Minneapolis-St. Paul MSA

COST OF LIVING

According to DEED's Cost of Living tool, the basic needs budget for an average Minnesota family (which consists of two adults and one child, with one full-time and one part-time worker) was $60,720 in 2022. The cost of living for a similar family in the Twin Cities Metro Area was about $67,716 – which was the highest of the six planning regions in the state. The highest monthly costs were for housing, food, and transportation, with housing, childcare, and taxes significantly higher than the rest of the state. To meet the basic cost of living for the region, each worker in the family scenario described would need to earn $21.70 per hour, again one working part-time and one working full time.

DEED's Cost of Living tool provides different estimates for household compositions including single people, partnered couples, and up to four children. For a single person living alone and working full-time, the estimated yearly cost in the Metro Area would be about $37,536 which would require an hourly wage of $18.05 to meet the basic needs standard of living (Table 8).

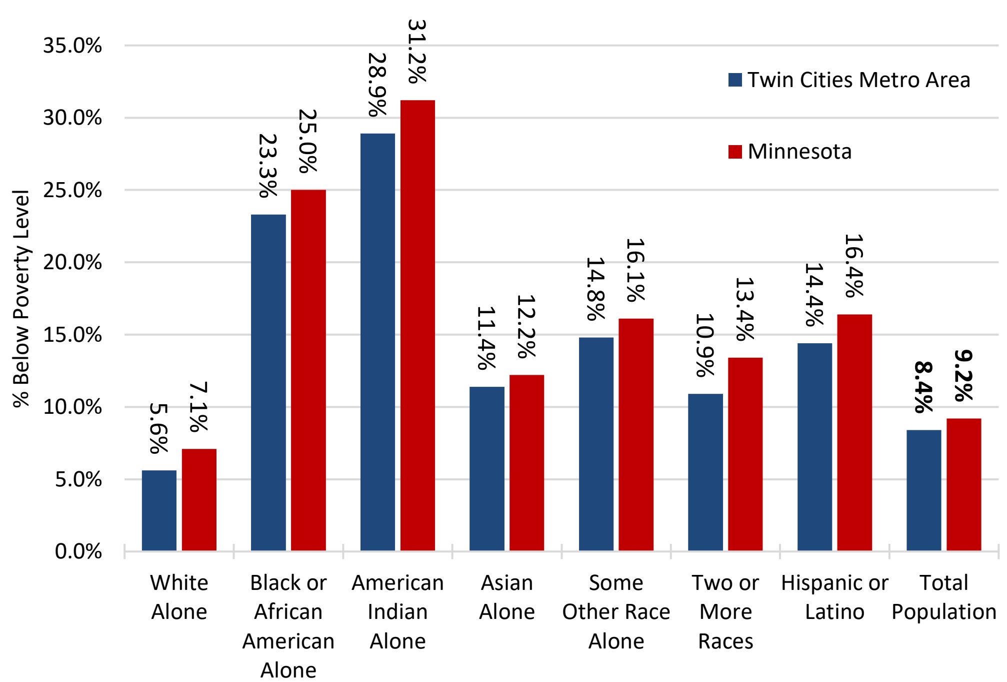
Table 8. Family Yearly Cost, Worker Hourly Wage, and Family Monthly Costs, 2022

Family Composition	Number of Workers	Yearly Cost of Living	Hourly Wage Required	Monthly Costs						
				Child Care	Food	Health Care	Housing	Trans-portation	Other	Taxes
Region 11										
Single, 0 children	1 FT	$37,536	$18.05	$0	$409	$156	$1,120	$732	$370	$341
Single, 1 child	1 FT	$69,444	$33.39	$1,560	$604	$359	$1,406	$736	$487	$635
2 parents, 1 child	**1 FT, 1 PT**	**$67,716**	**$21.70**	**$780**	**$936**	**$572**	**$1,406**	**$851**	**$567**	**$531**
2 parents, 2 children	2 FT	$105,684	$25.40	$2,318	$1,220	$583	$1,947	$897	$766	$1,076
State of Minnesota										
Single, 0 children	1 FT	$34,992	$16.82	$0	$403	$159	$961	$760	$330	$303
2 parents, 1 child	**1 FT, 1 PT**	**$60,720**	**$19.46**	**$574**	**$921**	**$555**	**$1,216**	**$886**	**$517**	**$391**

Source: DEED Cost of Living tool

Overall, the Metro Area's poverty rate was 8.4% in 2021, which was slightly below the statewide rate of 9.2%. Like incomes, poverty levels varied widely by race and origin. It was estimated that 28.9% of the region's American Indian or Alaska Native population was below the poverty level in 2021, compared to just 5.6% of the white population. About one-in-four (23.3%) of Black or African Americans in the region lived below the poverty level. Such levels were also higher for those reporting Some Other Race (14.8%), Hispanic or Latino origins (14.4%), Asian (11.4%), and Two or More Races (10.9%). In all cases, the region's poverty rate was lower than the state's poverty rate (Figure 13). The respective share of the population below the poverty level by county ranged from 3.8% in Carver County, 4.2% in Washington County, and 4.6% in Scott County to 13.2% in Ramsey County and 9.9% in Hennepin County.

Figure 13. Percent Below the Poverty Level by Race or Origin, 2021



Source: 2017-2021 American Community Survey

WAGES AND OCCUPATIONS

According to DEED's Occupational Employment & Wage Statistics program, the median hourly wage for all occupations in the Twin Cities Metro Area was $25.67 in the first quarter of 2023, which was the highest wage level of the six planning regions in the state. The Metro Area's median hourly wage was $1.42 above the state's median hourly wage, equaling about 105.9% of the statewide wage rate. Working full-time and year-round, a worker earning the median wage in the Metro Area would earn about $3,000 more than a worker earning the median wage in the state overall (Table 9). Zooming out, half of workers in the Metro Area earn between $18.46 and $40.42 per hour.

Table 9. Occupational Employment Statistics by Region, 1st Qtr. 2023	Median Hourly Wage	Estimated Regional Employment
EDR 1 - Northwest	$22.83	35,000
EDR 2 - Headwaters	$21.90	31,370
EDR 3 - Arrowhead	$22.57	136,490
EDR 4 - West Central	$21.88	87,550
EDR 5 - North Central	$19.98	62,060
EDR 6E - Southwest Central	$21.20	49,510
EDR 6W - Upper MN Valley	$20.82	16,160
EDR 7E - East Central	$22.48	48,210
EDR 7W - Central	$23.10	172,540
EDR 8 - Southwest	$21.23	51,900
EDR 9 - South Central	$22.61	99,520
EDR 10 - Southeast	$23.44	236,590
EDR 11 - 7-County Twin Cities	$25.67	1,718,290
State of Minnesota	**$24.25**	**2,827,310**

Source: DEED Occupational Employment & Wage Statistics

The top three-employing occupational groups in the Metro Area, being Office & Administrative Support Occupations, Business & Financial Operations Occupations, and Sales & Related Occupations, account for 29.5% of the region's total 1,718,290 jobs. With the impacts of COVID-19, Food Preparation & Serving Related Occupations dropped from the third most-employing occupational group to the sixth. The region stands out for having higher concentrations of Business & Financial Operations; Legal; Computer & Mathematical; Architecture & Engineering; and Arts, Design, Entertainment, & Media workers. When analyzing occupational data in Table 10, location quotients measure employment concentration within a specific area over a base economy, in this case the Metro Area over the State of Minnesota.

Table 10. Region 11 Occupational Employment & Wage Statistics, 1st Qtr. 2023

	Region 11				State of Minnesota		
	Median Hourly Wage	Estimated Regional Employment	*Share of Total Employment*	*Location Quotient*	Median Hourly Wage	Estimated Statewide Employment	*Share of Total Employment*
Total, All Occupations	$25.67	1,718,290	*100.0%*	*1.0*	$24.25	2,827,310	100.0%
Office & Administrative Support	$23.74	212,320	*12.4%*	*1.0*	$23.06	345,830	12.2%
Business & Financial Operations	$39.29	152,020	*8.8%*	*1.2*	$38.19	201,940	7.1%
Sales & Related	$19.61	142,400	*8.3%*	*1.0*	$18.14	239,500	8.5%
Transportation & Material Moving	$21.88	130,880	*7.6%*	*0.9*	$21.05	227,780	8.1%
Management	$60.18	128,450	*7.5%*	*1.1*	$51.58	193,760	6.9%
Food Preparation & Serving Related	$15.29	125,670	*7.3%*	*1.0*	$14.89	216,970	7.7%
Production	$22.67	109,650	*6.4%*	*0.9*	$22.07	209,380	7.4%
Healthcare Practitioners & Technical	$41.91	102,560	*6.0%*	*0.9*	$41.07	186,700	6.6%
Healthcare Support	$17.27	100,520	*5.9%*	*1.0*	$17.40	162,400	5.7%
Education, Training & Library	$25.35	89,460	*5.2%*	*0.9*	$24.82	158,830	5.6%
Computer & Mathematical	$51.41	78,440	*4.6%*	*1.3*	$49.73	99,250	3.5%
Construction & Extraction	$35.05	61,400	*3.6%*	*0.9*	$31.00	113,930	4.0%
Installation, Maintenance & Repair	$29.47	51,770	*3.0%*	*0.9*	$27.95	98,670	3.5%
Building, Grounds Cleaning & Maint.	$18.54	43,360	*2.5%*	*0.9*	$18.26	76,210	2.7%
Architecture & Engineering	$41.64	37,060	*2.2%*	*1.1*	$40.60	53,100	1.9%
Personal Care & Service	$17.34	36,850	*2.1%*	*1.0*	$16.96	58,120	2.1%
Community & Social Service	$26.00	30,510	*1.8%*	*0.9*	$25.82	54,820	1.9%
Arts, Design, Entertainment & Media	$30.59	26,520	*1.5%*	*1.2*	$28.80	37,630	1.3%
Protective Service	$25.28	23,310	*1.4%*	*0.9*	$25.83	40,620	1.4%
Life, Physical & Social Science	$41.34	19,160	*1.1%*	*1.1*	$39.37	29,070	1.0%
Legal	$51.41	14,890	*0.9%*	*1.3*	$47.87	18,730	0.7%
Farming, Fishing & Forestry	$19.21	1,090	*0.1%*	*0.4*	$19.84	4,060	0.1%

Source: DEED Occupational Employment & Wage Statistics, Qtr. 1 2023

When analyzing occupational groups by wage, the lowest-paying jobs are concentrated in Food Preparation & Serving; Building, Grounds Cleaning & Maintenance; Sales & Related; Personal Care & Service; and Healthcare Support, which tend to have lower educational and training requirements. In contrast, the highest paying jobs are found in Management; Computer & Mathematical; Legal; Architecture & Engineering; Healthcare Practitioners; Business & Financial Operations; and Life, Physical, & Social Science occupations, which all need higher levels of education and experience, including many that require postsecondary training. The pay gaps between the region and state are much bigger in these occupations (Table 10).

JOB VACANCY SURVEY

Employers in Twin Cities Metro Area reported a near record-high 98,330 job vacancies during 2022, which accounted for over half (53.3%) of the state's total 184,588 job vacancies. After dropping to about 65,900 job vacancies during the second quarter of 2020, job vacancies quickly rebounded during the fourth quarter of that year and beyond. While the region did witness a 22.5% decrease in the number of job vacancies from the 4th quarter of 2021, the 98,330 job vacancies in 2022 represented the 3rd-most job vacancies in the region since the survey began in 2001. The median hourly wage offer was $19.96 across all occupations but ranged from a low of $14.98 per hour for Personal Care & Service workers, to $40.00 per hour or more for Management, Legal, and Computer & Mathematical workers.

The largest number of vacancies were in Food Preparation & Serving Occupations, followed by Sales & Related Occupations, Healthcare Practitioners & Technical Occupations, Healthcare Support Occupations, and Office & Administrative Support Occupations. More than half (50.9%) of the vacancies in the region were in these five occupational groups. Overall, 36% of the openings were for part-time work, 38% required postsecondary education, and 54% required a year or more of experience (Table 11). It should be noted that the share of total job vacancies being for part-time work has dropped from 41% of total vacancies in 2017. This reveals that more and more employers are taking advantage of their current workforce and setting them up with full-time work.

Table 11. Region 11 Job Vacancy Survey Results, 2022

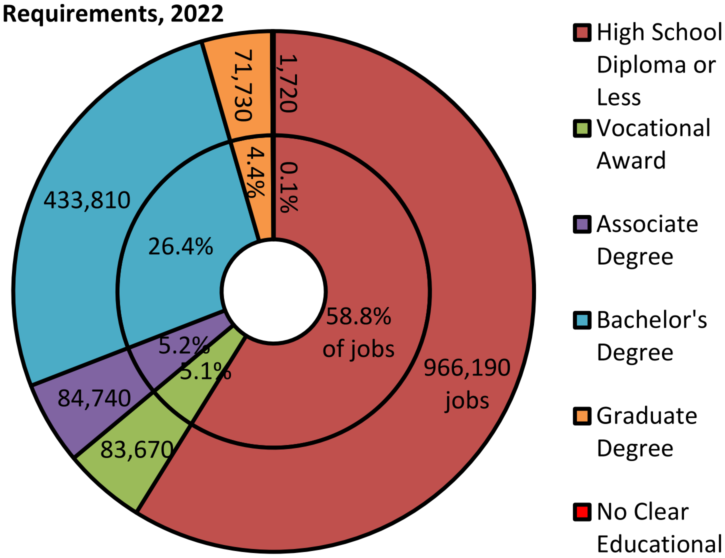
	Number of Total Vacancies	Percent Part-time	Percent Temporary or Seasonal	Requiring Post-Secondary Education	Requiring 1 or More Years of Experience	Requiring Certificate or License	Median Hourly Wage Offer
Total, All Occupations	98,330	36%	6%	38%	54%	39%	$19.96
Food Preparation & Serving Related	11,820	48%	7%	1%	32%	9%	$16.04
Sales & Related	11,574	46%	1%	12%	44%	9%	$15.78
Healthcare Practitioners & Technical	11,408	60%	3%	84%	68%	88%	$29.63
Healthcare Support	8,641	47%	2%	19%	20%	58%	$16.00
Office & Administrative Support	6,621	31%	2%	13%	63%	8%	$18.77
Transportation & Material Moving	6,509	21%	7%	3%	30%	66%	$19.73
Business & Financial Operations	5,826	16%	7%	71%	95%	25%	$31.83
Production	4,689	15%	1%	9%	52%	7%	$19.98
Management	4,490	11%	1%	83%	100%	37%	$43.43
Education, Training & Library	4,172	36%	22%	86%	70%	70%	$20.51
Computer & Mathematical	3,821	16%	3%	74%	98%	33%	$42.59
Building, Grounds Cleaning & Maint.	3,219	46%	10%	0%	10%	49%	$16.00
Installation, Maintenance & Repair	3,081	6%	6%	49%	70%	33%	$19.23
Community & Social Service	2,982	32%	13%	67%	82%	70%	$22.23
Personal Care & Service	2,319	56%	27%	16%	33%	32%	$14.98
Architecture & Engineering	2,143	9%	1%	81%	82%	43%	$35.24
Construction & Extraction	1,352	3%	15%	12%	31%	27%	$20.76
Arts, Design, Entertainment & Media	1,176	39%	13%	54%	79%	49%	$21.49
Protective Service	939	51%	20%	15%	36%	57%	$17.46
Life, Physical & Social Sciences	824	16%	2%	82%	84%	30%	$25.82
Legal	193	12%	1%	82%	89%	77%	$43.21

Source: DEED Job Vacancy Survey, 2022

EDUCATIONAL REQUIREMENTS

Typically, DEED's Job Vacancy Survey shows that about 40% of job vacancies in the Twin Cities Metro Area require some level of post-secondary education. This is similar to the share of jobs requiring post-secondary education as highlighted by DEED's Occupational Employment Statistics program. As of 2022, this program showed that 41% of all jobs in the region required post-secondary edcuation (Figure 14). In other words, the majority of jobs in the Metro Area, 59%, required a high school diploma or less.

Figure 14. Region 11 Share of Jobs by Educational Requirements, 2022



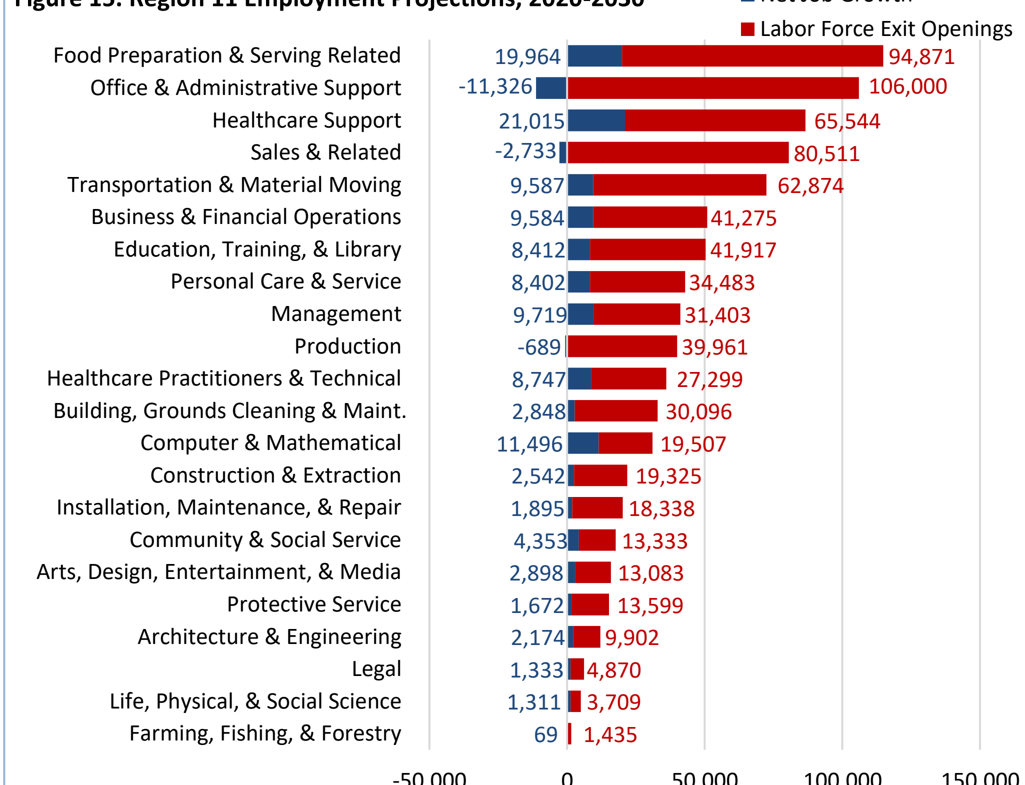
Source: DEED Occupational Employment Statistics (OES)

Certain careers – such as Dentists, Lawyers, and Teachers – require a college education, while other jobs – including Cost Estimators, Sales Representatives, and Correctional Officers – do not. College is an excellent way to move up career ladders and open windows of opportunity to fields that would otherwise be closed, such as nursing or engineering. Many of these occupations offer high wages and are in high demand in the marketplace. While education is typically a worthwhile investment, college can be expensive. According to the Minnesota Office of Higher Education, average annual expenses for a full-time resident undergrad can range from $20,570 at state colleges to $53,670 at private non-profit colleges. For those who go onto to higher education and college, choice of major matters – different programs lead to different jobs that earn different amounts of money.

EMPLOYMENT PROJECTIONS

Overall, the Metro Area is projected to grow 6.2% from 2020 to 2030, a gain of nearly 113,300 net new jobs. In addition, the region is also expected to need approximately 773,300 replacement openings to fill jobs left vacant by retirements and other career changers. Healthcare Support, Food Preparation & Serving, Computer & Mathematical, Management, and Transportation & Material Moving occupations are expected to see the most net new growth, but every occupational group will show some future demand either through new jobs or replacement openings (Figure 15).

Figure 15. Region 11 Employment Projections, 2020-2030



Source: DEED Employment Outlook

OCCUPATIONS IN DEMAND

According to DEED's Occupations in Demand tool, there are about 300 distinct occupations showing relatively high demand in the region, with training and education requirements ranging from short-term on-the-job training to postsecondary education to advanced degrees. These occupations are spread across different sectors but are also concentrated in the region's major industries. For example, Retail Salespersons, Personal Care Aides, Registered Nurses, Software Developers, Accountants, and Heavy and Tractor-Trailer Truck Drivers are among the top occupations in demand based on the consistent need for workers in these fields. Those occupational groups with the most occupations in the top-100 in-demand occupations include Food Preparation & Serving, Management, Office & Administrative Support, Sales & Related, and Transportation & Material Moving (Table 12).

Table 12. Region 11 Occupations in Demand by Education Level, 2022

Less than High School	High School or Equivalent	Some College, Vocational Training, or Assoc. Degree	Bachelor's Degree or Higher
Home Health & Personal Care Aides ($33,154)	Nursing Assistants ($43,351)	Registered Nurses ($91,157)	Software Developers ($117,626)
Retail Salespersons ($33,769)	Licensed Practical & Licensed Vocational Nurses ($59,297)	Clinical Laboratory Technologists & Technicians ($64,938)	Accountants & Auditors ($80,271)
Cashiers ($30,580)	Medical Assistants ($51,083)	Veterinary Technologists & Technicians ($47,307)	Management Analysts ($101,561)
Customer Service Representatives ($47,638)	Machinists ($59,228)	Dental Hygienists ($87,968)	Financial Managers ($141,401)
First-Line Supervisors of Food Prep & Serving Workers ($41,302)	Computer User Support Specialists ($64,464)	Police & Sheriff's Patrol Officers ($87,344)	Marketing Managers ($167,023)
First-Line Supervisors of Retail Sales Workers ($49,618)	Automotive Service Technicians & Mechanics ($52,440)	Physical Therapists Assistants ($65,385)	Market Research Analysts & Marketing Specialists ($81,617)
Laborers & Freight, Stock, & Material Movers, Hand ($36,894)	Electricians ($82,047)	Radiologic Technologists & Technicians ($81,372)	General & Operations Managers ($102,232)
Stockers & Order Fillers ($44,689)	Dental Assistants ($64,757)	Industrial Engineering Technologists ($66,723)	Project Management Specialists ($88,309)
Heavy & Tractor-Trailer Truck Drivers ($61,872)	Hairdressers, Hairstylists, & Cosmetologists ($39,273)	Electrical & Electronic Engineering Technologists ($67,986)	Human Resource Specialists ($75,670)
Fast Food & Counter Workers ($31,619)	Web Developers ($90,321)	Mechanical Engineering Technologists ($69,851)	Industrial Engineers ($103,178)

Source: DEED Occupations in Demand

ECONOMY

INDUSTRY EMPLOYMENT

According to DEED's Quarterly Census of Employment & Wages (QCEW) program, the Metro Area was home to about 92,000 business establishments providing an average of nearly 1.73 million covered jobs through 2022 (Table 13). The average annual wage across all industries was $76,789 in the Twin Cities Metro Area, which was about 10.1% higher than the state's average annual wage across all industries (Table 13).

Table 13. Region 11 Industry Employment Statistics, 2022

Geography	Number of Firms	Number of Jobs	Total Payroll ($1,000s)	Average Annual Wage	2021-2022 Change in Jobs	2021-2022 Percent Change	2019-2022 Change in Jobs	2019-2022 Percent Change
Minnesota	199,603	2,851,778	$198,839,399	$69,725	+77,490	+2.8%	-49,854	-1.7%
Twin Cities Metro Area	91,945	1,726,710	$132,592,927	$76,789	+47,423	+2.8%	-49,729	-2.8%
Hennepin County	43,707	901,421	$77,528,375	$86,007	+22,822	+2.6%	-36,347	-3.9%
Ramsey County	15,064	319,353	$23,274,700	$72,881	+7,245	+2.3%	-16,013	-4.8%
Dakota County	11,467	185,225	$12,556,316	$67,790	+4,205	+2.3%	-6,274	-3.3%
Anoka County	8,434	129,457	$7,974,444	$61,599	+4,708	+3.8%	+1,494	+1.2%
Washington County	6,649	91,779	$5,220,459	$56,881	+3,301	+3.7%	+3,336	+3.8%
Scott County	3,846	59,015	$3,401,237	$57,633	+3,164	+5.7%	+4,204	+7.7%
Carver County	2,778	40,459	$2,637,396	$65,187	+1,978	+5.1%	-128	-0.3%

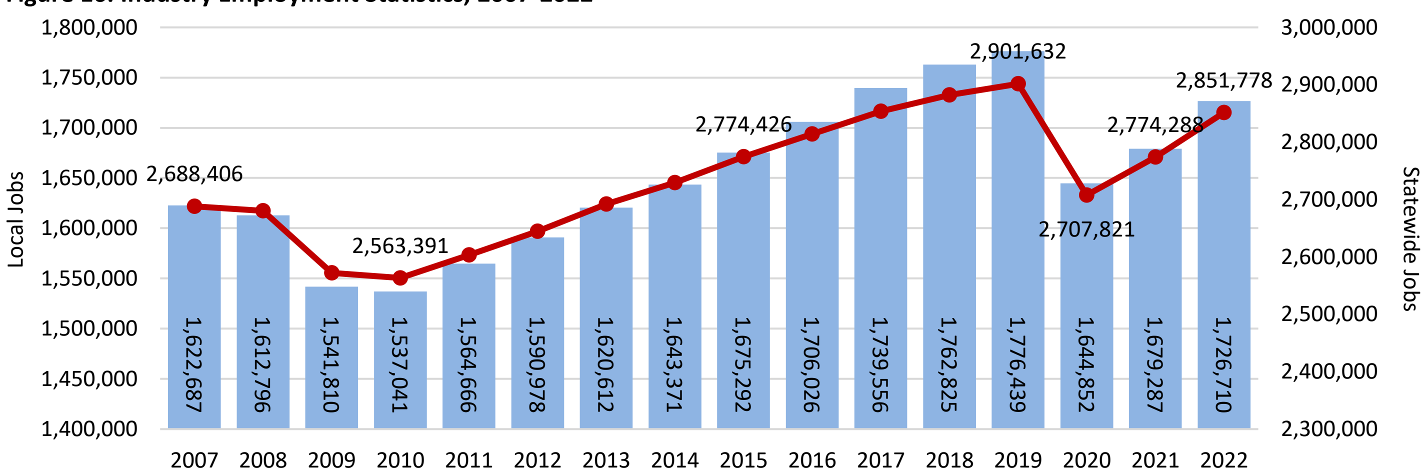
Source: DEED Quarterly Census of Employment & Wages (QCEW)

After losing over 85,600 jobs (-5.3%) during the Great Recession between 2007 and 2010, the Twin Cities Metro Area went on to gain nearly 239,400 jobs (+15.6%) between 2010 and 2019. The regional growth rate of 15.6% outpaced the respective statewide employment growth rate of 13.2% during that period. In fact, where the Metro Area accounted for 61.2% of Minnesota's total employment in 2019, it accounted for 70.8% of the state's total employment growth between 2010 and 2019 (Figure 16).

With the onset of COVID-19 in 2020, however, the Metro Area experienced significant industry employment loss. Between annual 2019 and 2020 the Metro Area's total employment plummeted by nearly 131,600 jobs. This 7.4% drop was slightly more severe than the state's respective 6.7% drop during that period. For the region, such employment loss was much more significant than losses experienced during the Great Recession. Zooming into quarterly trends, employment loss during COVID was most extreme between the second quarters of 2019 and 2020. During that period, Metro Area total employment dropped by 233,435 jobs (-13.1%).

Employment in the Metro Area began its recovery after the second quarter of 2020. Between the second quarters of 2020 and 2021 the Metro Area regained 131,611 jobs, growing by 8.5%. Growth continued through the next year, albeit slower, with the region gaining 56,033 jobs between the second quarters of 2021 and 2022 (+3.3%). Between annual 2020 and 2022, the Metro Area's industry employment rebounded by nearly 81,900 jobs (+5.0%). As such, the region was just under 50,000 jobs below its pre-COVID 2019 level of employment in 2022 (Figure 16).

Figure 16. Industry Employment Statistics, 2007-2022



Source: DEED QCEW program

Between annual 2019 and 2022, those Metro Area industry sectors losing the most jobs included Accommodation & Food Services (-14,494 jobs; -10.3%); Retail Trade (-11,044 jobs; -6.7%); Finance & Insurance (-8,840 jobs; -7.7%); Administrative & Support Services (-4,228 jobs; -4.3%); and Educational Services (-3,995 jobs; -3.0%). Overall, 12 of the region's 20 major industries were below their respective 2019 levels of employment in 2022. Those industries above their respective 2019 levels of employment in 2022 included Transportation & Warehousing (+2,885 jobs; +3.9%); Construction (+2,537 jobs; +3.4%); Manufacturing (+1,109 jobs; +0.6%); Wholesale Trade (+920 jobs; +1.2%); Professional & Technical Services (+749 jobs; +0.6%); Agriculture, Forestry, Fishing, & Hunting (+418 jobs; +13.6%); Utilities (+272 jobs; +4.4%); and Mining (+73 jobs; +13.7%) (Table 14).

More recently, between annual 2021 and 2022, industry growth in the Metro Area was led by Accommodation & Food Services (+14,243 jobs; +12.7%); Manufacturing (+6,119 jobs; +3.6%); Transportation & Warehousing (+6,054 jobs; +8.6%); Arts, Entertainment, & Recreation (+5,542 jobs; +20.3%); and Professional & Technical Services (+4,131 jobs; +3.4%). Overall, 17 of the region's 20 major industries added jobs between annual 2021 and 2022. Those three industries losing jobs during that period included Finance & Insurance (-5,669 jobs; -5.1%); Retail Trade (-1,144 jobs; -0.7%); and Management of Companies (-494 jobs; -0.6%).

Table 14. Region 11 Industry Employment Statistics, 2022									
NAICS Industry Title	2022 Annual Data				Avg. Annual Wage	2021-2022		2019-2022	
	Number of Firms	Number of Jobs	Percent of Jobs	Total Payroll ($1,000s)		Change in Jobs	Percent Change	Change in Jobs	Percent Change
Total, All Industries	91,945	1,726,710	100.0%	$132,592,927	$76,789	+47,423	+2.8%	-49,729	-2.8%
Health Care & Social Assistance	13,204	278,895	16.2%	$17,408,008	$62,418	+1,833	+0.7%	-52	-0.0%
Manufacturing	4,046	174,170	10.1%	$15,163,383	$87,061	+6,119	+3.6%	+1,109	0.6%
Retail Trade	8,199	153,774	8.9%	$6,230,182	$40,515	-1,144	-0.7%	-11,044	-6.7%
Educational Services	2,383	131,161	7.6%	$8,256,499	$62,949	+2,897	+2.3%	-3,995	-3.0%
Professional & Technical Services	11,989	126,722	7.3%	$15,020,411	$118,530	+4,131	+3.4%	+749	+0.6%
Accommodation & Food Services	6,374	126,600	7.3%	$3,539,304	$27,957	+14,243	+12.7%	-14,494	-10.3%
Finance & Insurance	5,059	106,236	6.2%	$14,505,693	$136,542	-5,669	-5.1%	-8,840	-7.7%
Administrative & Support Srvc.	4,594	93,057	5.4%	$4,879,797	$52,439	+3,291	+3.7%	-4,228	-4.3%
Construction	7,068	78,250	4.5%	$6,800,682	$86,910	+2,307	+3.0%	+2,537	+3.4%
Wholesale Trade	5,220	78,051	4.5%	$8,104,797	$103,840	+2,584	+3.4%	+920	+1.2%
Transportation & Warehousing	2,163	76,682	4.4%	$5,220,120	$68,075	+6,054	+8.6%	+2,885	+3.9%
Management of Companies	979	76,265	4.4%	$11,265,960	$147,721	-494	-0.6%	-2,643	-3.3%
Public Administration	806	71,805	4.2%	$5,499,751	$76,593	+1,433	+2.0%	-1,300	-1.8%
Other Services	11,148	53,436	3.1%	$2,532,354	$47,390	+2,511	+4.9%	-3,909	-6.8%
Arts, Entertainment, & Recreation	1,850	32,854	1.9%	$1,786,051	$54,363	+5,542	+20.3%	-3,673	-10.1%
Information	1,993	31,305	1.8%	$3,404,533	$108,754	+702	+2.3%	-3,917	-11.1%
Real Estate & Rental & Leasing	4,420	26,855	1.6%	$1,903,648	$70,886	+591	+2.3%	-593	-2.2%
Utilities	110	6,494	0.4%	$848,033	$130,587	+248	+4.0%	+272	+4.4%
Agriculture, Forestry, Fish & Hunt	303	3,491	0.2%	$152,587	$43,709	+162	+4.9%	+418	+13.6%
Mining	39	606	0.0%	$71,134	$117,383	+82	+15.6%	+73	+13.7%
Source: DEED Quarterly Census of Employment & Wages (QCEW)									

According to DEED's Quarterly Employment Demographics (QED) program, the workforce in the Twin Cities Metro Area has aged over the past 10 years. For example, in 2012, 17.2% of the region's workforce was 55 years of age and older. By 2022, 21.3% of the workforce was 55 years of age and older.

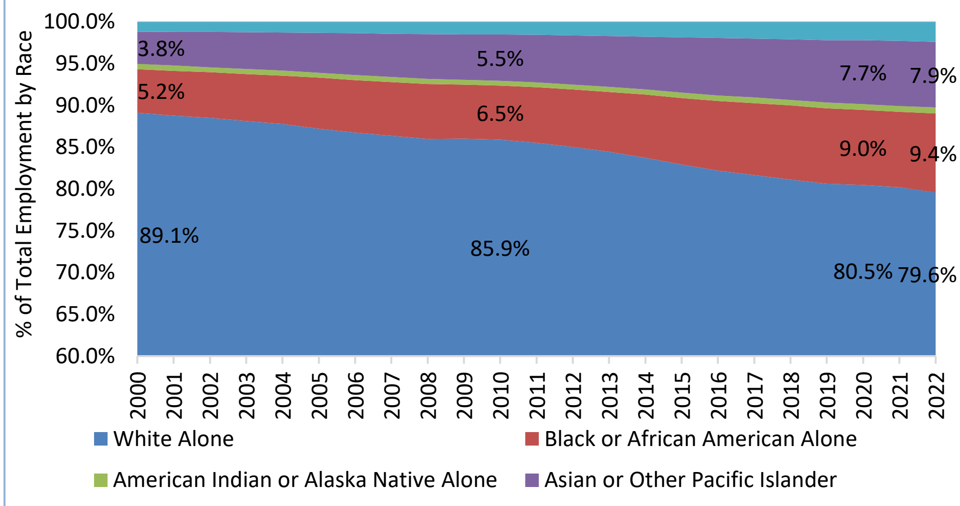
With rising demand and tight labor market conditions, wages have been climbing across the board for all workers. While wages were still lowest for the youngest and oldest workers who tend to fill lower-skilled, less-than-fulltime jobs in industries like Retail Trade and Accommodation and Food Services, these two age groups enjoyed the fastest percentage increase in wages from 2012 to 2022 (Table 15).

Table 15. Region 11 Workforce Demographics by Age Group and Gender, Total of All Industries, 2012-2022								
Region 11	Percentage of Workers		Minnesota		Median Hourly Wage		Median Hours Worked (Per Qtr.)	
	2022	2012	2022	2012	2022	2012	2022	2012
Total, all ages	100.0%	100.0%	100.0%	100.0%	$25.54	$18.24	431	442
19 years & under	5.8%	5.3%	6.6%	6.3%	$15.14	$8.03	113	113
20 to 24 years	8.9%	10.9%	9.2%	11.3%	$19.24	$11.09	270	252
25 to 44 years	45.2%	44.4%	43.6%	42.3%	$28.87	$19.96	463	476
45 to 54 years	18.9%	22.2%	18.4%	21.9%	$33.74	$24.28	486	480
55 to 64 years	16.4%	14.1%	16.7%	14.7%	$30.85	$23.41	482	480
65 years & over	4.9%	3.1%	5.4%	3.5%	$21.54	$15.60	297	269
Male	49.0%	49.5%	49.1%	49.1%	$29.17	$20.38	475	480
Female	51.0%	50.5%	50.9%	50.9%	$24.81	$17.31	398	400
Source: DEED Quarterly Employment Demographics								

Employment Diversity

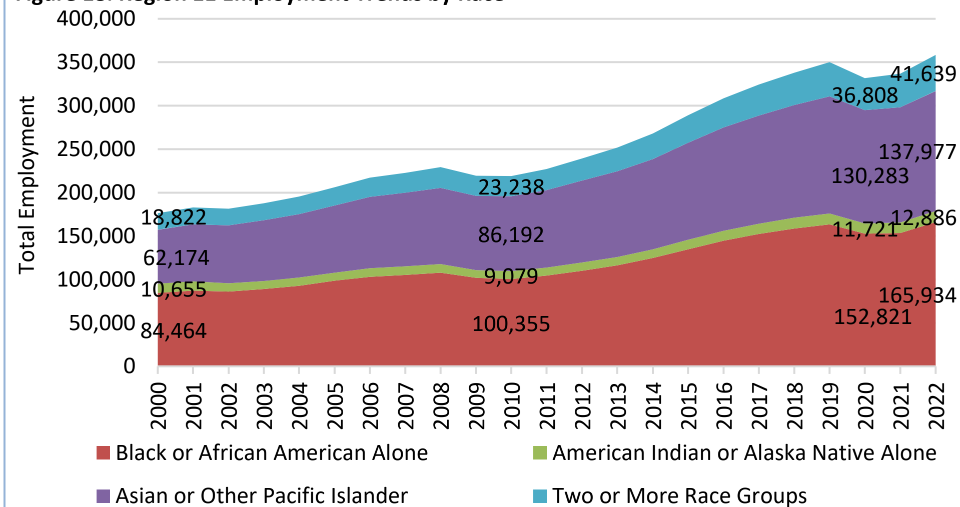
According to the U.S. Census Bureau's American Community Survey and the Quarterly Workforce Indicators program, where those reporting as a race other than white make up 23.5% of the overall labor force in the Metro Area, they held 20.4% of total jobs in the region. Through annual 2022, that equaled 358,436 workers of color, compared to 1,397,521 white alone workers. Workers of color held just 10.9% of total jobs in the region in 2000 (Figure 17). Further, there were nearly 104,300 workers with Hispanic and Latino origins in the Metro Area in 2022, accounting for 5.9% of the region's total jobs. This was up from 2.9% in 2000.

Figure 17. Region 11Employment Share Trends by Race



Source: Quarterly Workforce Indicators

Figure 18. Region 11 Employment Trends by Race



Source: Quarterly Workforce Indicators

In sum, workers of color filled an additional 182,321 jobs in the Metro Area between 2000 and 2022, accounting for a growth rate of 103.5%. With 165,934 jobs, Black or African Americans are the largest population of color in the regional economy, gaining 81,470 jobs between 2000 and 2022 (+96.5%). Asian or Other Pacific Islanders in the workforce more than doubled (+75,803 jobs; +121.9%) between 2000 and 2022, accounting for 137,977 jobs in 2022. Workers reporting Two or More Races held 41,639 jobs in 2022, also more than doubling (+22,817 jobs; +121.2%) since 2000. With 12,886 jobs in 2022, American Indian or Alaska Natives added 2,231 jobs (+20.9%) between 2000 and 2022. The white workforce in the region declined by 3.2% (-46,428 jobs) between 2000 and 2022 (Figure 17 and 18).

The Quarterly Workforce Indicators data can reveal more recent employment trends by race and ethnicity. Between annual 2019 and 2020, the region's total employment dropped by 6.0%, or 108,154 jobs. By race, jobs held by American Indian or Alaska Natives declined by 6.9% (-875 jobs), jobs held by Black or African Americans dropped by 6.4% (-10,426 jobs), and jobs held by those reporting Two or More Races dropped by 6.0% (-2,366 jobs). Jobs held by Asian or Other Pacific Islanders dropped by a less severe 3.5% (-4,749 jobs) during that period, while jobs held by White workers dropped by 6.2% (-89,738 jobs). Jobs held by Hispanic or Latino workers decreased by 5.3% (-18,416 jobs).

More recently, between annual 2020 and 2022, total employment in the Metro Area increased by 3.4% (+57,440 jobs). Growth rates by race and origin were as follows: Two or More Races at +13.1% (+4,831 jobs), American Indian or Alaska Natives at +9.9% (+1,165 jobs), Black or Afircan Americans at +8.6% (+13,113 jobs), Asian or Other Pacific Islanders at +5.9% (+7,694 jobs), and white at +2.2% (+30,637 jobs). Jobs held by Hispanic or Latino workers increased by 8.1% (+26,803) during this period.

INDUSTRY PROJECTIONS

Total employment in the Twin Cities Metro Area is anticipated to grow by 6.2% between 2020 and 2030. This is equivalent to approximately 113,300 net new jobs. The most extensive growth is expected to be in Health Care and Social Assistance, where its total employment is projected to increase by over 38,300 net new jobs. The region is also expected to see significant employment growth in Accommodation and Food Services (+20,600 jobs), Professional and Technical Services (+14,900 jobs), Arts and Entertainment (+9,700 jobs), and Other Services (+7,800 jobs). It should be noted that in addition to net new job growth, the Twin Cities region is anticipated to have over 773,300 labor market exit openings between 2020 and 2030. These are job openings largely due to workers leaving an occupation and exiting the labor market entirely (retirements making up the most of these exits). Even industries that are projected to lose total net employment, sch as Manufacturing, will still have labor market exit openings (Table 16).

Table 16. Region 11 Industry Projections, 2020-2030

Industry	Estimated Employment 2020	Projected Employment 2030	*Percent Change 2020-2030*	*Numeric Change 2020-2030*
Total, All Industries	**1,817,290**	**1,930,563**	***+6.2%***	***+113,273***
Health Care & Social Assistance	263,959	302,212	*+14.5%*	*+38,253*
Accommodation & Food Services	99,983	120,548	*+20.6%*	*+20,565*
Professional & Technical Services	130,777	145,663	*+11.4%*	*+14,886*
Arts, Entertainment & Recreation	24,795	34,447	*+38.9%*	*+9,652*
Other Services	66,176	73,930	*+11.7%*	*+7,754*
Admin. Support & Waste Mgmt.	92,297	99,818	*+8.1%*	*+7,521*
Educational Services	137,141	144,455	*+5.3%*	*+7,314*
Transportation & Warehousing	66,965	71,507	*+6.8%*	*+4,542*
Finance & Insurance	129,919	134,057	*+3.2%*	*+4,138*
Construction	71,168	74,189	*+4.2%*	*+3,021*
Manufacturing	166,580	168,309	*+1.0%*	*+1,729*
Public Administration	100,458	101,195	*+0.7%*	*+737*
Wholesale Trade	84,618	85,349	*+0.9%*	*+731*
Management of Companies	77,977	78,634	*+0.8%*	*+657*
Information	31,984	32,510	*+1.6%*	*+526*
Agriculture, Forestry, Fish & hunt	3,241	3,352	*+3.4%*	*+111*
Mining	545	577	*+5.9%*	*+32*
Real Estate & Rental & Leasing	26,725	26,712	*0.0%*	*-13*
Utilities	5,640	4,863	*-13.8%*	*-777*
Retail Trade	153,655	147,205	*-4.2%*	*-6,450*

Source: DEED 2020-2030 Employment Outlook

NONEMPLOYER ESTABLISHMENTS

The Metro Area was home to nearly 245,300 self-employed businesses or "nonemployers" in 2019, which are defined by the U.S. Census Bureau as "businesses without paid employees that are subject to federal income tax, originating from tax return information of the Internal Revenue Service (IRS)." The region did witness healthy growth in the number of nonemployers over the past decade, with the number of such firms increasing by 17.7%. Most growth was in Hennepin and Ramsey counties, with rapid growth also in Carver County. These non-employers generated sales receipts of nearly $12.3 billion in 2019 (Table 17).

Table 17. Nonemployer Statistics, 2019

	2019		*2009-2019*	
	Number of Firms	Receipts ($1,000s)	*Change in Firms*	*Percent Change*
Region 11	**245,279**	**$12,276,926**	***+36,938***	***+17.7%***
Anoka Co.	24,387	$1,105,552	*+2,891*	*+13.4%*
Carver Co.	8,615	$459,154	*+1,525*	*+21.5%*
Dakota Co.	30,927	$1,502,759	*+3,876*	*+14.3%*
Hennepin Co.	110,209	$5,926,376	*+17,388*	*+18.7%*
Ramsey Co.	39,984	$1,725,500	*+6,330*	*+18.8%*
Scott Co.	11,606	$607,770	*+1,987*	*+20.7%*
Washington Co.	19,551	$949,815	*+2,941*	*+17.7%*
Minnesota	**418,080**	**$20,377,253**	***+39,926***	***+10.6%***

Source: U.S. Census, Nonemployer Statistics program

CENSUS OF AGRICULTURE

Unlike other regions of Minnesota, agriculture is not a key industry in the Metro Area. Despite this, there were over 3,700 farms producing just over $610 million in the market value of products sold in 2017, according to the U.S. Department of Agriculture. All the counties in the planning region ranked in the bottom half of the state's 87 counties for the market value of product sold in Agriculture, expect for Dakota County (Table 18).

Table 18. Census of Agriculture, 2017

	Number of Farms	Market Value of Products Sold	*State Rank*
Region 11	**3,743**	**$611,422,000**	***10***
Anoka Co.	360	$67,759,000	*63*
Carver Co.	689	$111,378,000	*58*
Dakota Co.	820	$235,415,000	*37*
Hennepin Co.	467	$58,570,000	*67*
Ramsey Co.	55	$2,951,000	*85*
Scott Co.	740	$75,570,000	*61*
Washington Co.	612	$59,779,000	*66*
Minnesota	**68,822**	**$18,395,390,000**	

Source: 2017 Census of Agriculture