EMPLOYMENT AND ECONOMIC DEVELOPMENT

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Healthcare Trends in Central Minnesota

More than one in six jobs in Central Minnesota is at a Health Care and Social Assistance establishment. This significant sector shapes the region's economy, communities, and the opportunities for workers. With nearly 50,000 jobs, Health Care and Social Assistance is easily the largest industry in Central Minnesota.

In the period 2007-2017 the Health Care and Social Assistance industry grew three times faster than the overall economy in Central Minnesota at 18 percent, compared to 6 percent overall. The faster growth since 2000 has increased the share of jobs in Health Care and Social Assistance from 13 percent then to 18 percent in 2017 (see Figure 1).

Starting in 2010, however, the rapid expansion of the Health Care and Social Assistance industry slowed to a point where it has actually lagged the overall economy in most years since with the exception of 2014 and 2016. This is a departure from statewide trends that still show Health Care and Social Assistance growing much faster than the overall economy.

Four Main Subsectors

Within the broad Health Care and Social Assistance industry there are four main subsectors:

- Ambulatory healthcare services
- Hospitals
- Nursing and residential care facilities
- Social assistance

The largest of the four subsectors is ambulatory healthcare services, with 14,105 jobs in 2017. Prior to 2012 hospitals had the largest number of jobs. Employment and average annual wages include many occupations at healthcare establishments that are removed from the delivery of care, such as cooks, building maintenance, grounds keeping, and housekeeping jobs.

Features:

Feature: Minnesota Job Outlook, 1st Q 2018 to 1st Q 2019

County Snapshots: *Nobles, Norman, Olmsted, Otter Tail*

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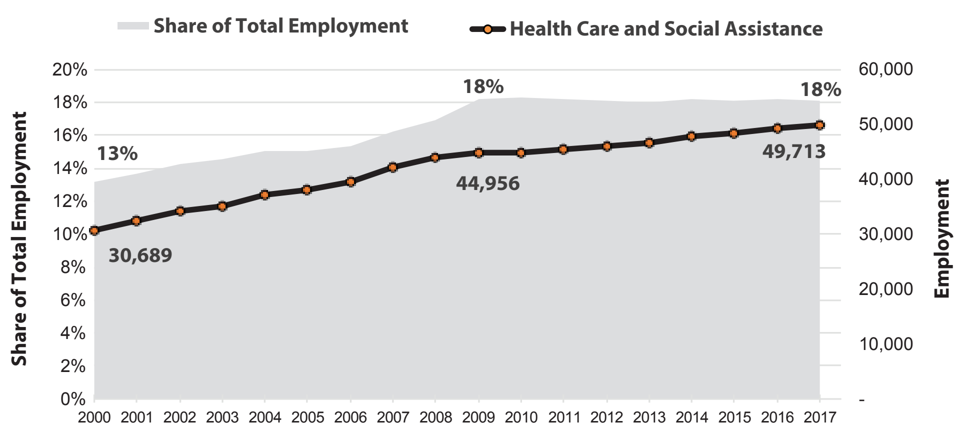
Figure 1. Healthcare and Social Assistance Employment in Central Minnesota



Source: DEED, Quarterly Census of Employment and Wages

Noteworthy is the drastically different average annual wages paid by each subsector. Both ambulatory health care and hospitals have higher than typical average wages, while nursing and residential care facilities and social assistance pay substantially less. Most of the wage differences can be attributed to the occupational mix within each industry, which will be covered in more detail later in this article.

Shift Share

Digging deeper into the industry reveals a shift occurring within the broad industry that is changing the future of health care. Since the slower growth trend started in 2011 for the overall Health Care and Social Assistance industry, the ambulatory health care services component grew 28.4 percent while nursing and residential care employment actually declined slightly, down 0.1 percent. Hospital employment also had lackluster employment growth at just 3.2 percent while social assistance grew a more typical 11.5 percent. In comparison, the overall economy grew jobs by 10.1 percent from 2011 to 2017.

Figure 2 illustrates how this shift in the location of jobs within the broader health care and social assistance industry is a direct reflection of the changing delivery of care. The rising costs of delivering care coupled with changing care practices is reflected by the decreasing share of employment at hospitals being offset by an increasing share in the ambulatory health care services sector. The slight decline in nursing and residential care facilities employment pushed its share of employment in the industry down two points from 2011 to 2017.

The shift in industry employment has a direct impact on the types of occupations health care providers need to fill. For instance, the shift from hospital employment to ambulatory health care services will change

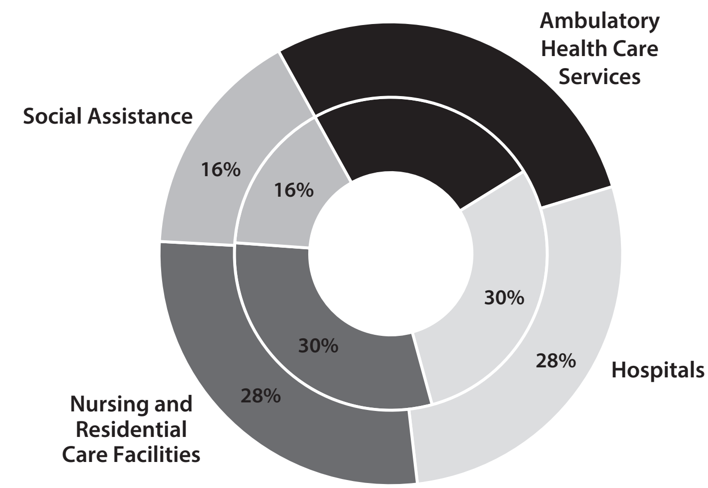
Table 1. Central Minnesota Healthcare and Social Assistance Employment Statistics, 2017

NAICS Code	Industry	Establishments	Employment	Location Quotient	Average Annual Wage	Total Industry Payroll
0	**Total, All Industries**	**17,263**	**274,862**	**1.0**	**$42,328**	**$11,639,999,915**
62	**Health Care and Social Assistance**	**1,564**	**49,713**	**1.1**	**$44,668**	**$2,222,594,359**
621	**Ambulatory Health Care Services**	**765**	**14,105**	**1.0**	**$60,892**	**$859,425,282**
6211	Offices of Physicians	157	5,240	0.8	$90,792	$475,841,609
6216	Home Health Care Services	50	2,928	1.2	$25,532	$74,845,403
6213	Offices of Other Health Practitioners	296	1,667	1.0	$36,244	$60,436,861
6212	Offices of Dentists	186	1,653	1.1	$53,560	$88,620,019
6214	Outpatient Care Centers	46	706	0.6	$53,768	$37,990,306
6219	Other Ambulatory Health Care Services	22	376	0.5	$44,356	$16,690,419
6215	Medical and Diagnostic Laboratories	9	1,533	4.2	$68,744	$105,000,665
622	**Hospitals**	**32**	**13,844**	**1.1**	**$58,032**	**$803,961,033**
623	**Nursing and Residential Care Facilities**	**321**	**13,760**	**1.3**	**$27,924**	**$384,693,538**
6231	Nursing Care Facilities (Skilled Nursing Facilities)	50	5,731	1.3	$28,080	$161,036,503
6232	Residential Intellectual and Developmental Disability, Mental Health and Substance Abuse Facilities	166	4,487	1.5	$31,564	$141,780,873
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	58	2,274	1.0	$23,556	$53,600,116
6239	Other Residential Care Facilities	47	1,268	1.2	$22,308	$28,276,046
624	**Social Assistance**	**447**	**8,003**	**0.9**	**$21,788**	**$174,514,506**
6241	Individual and Family Services	269	5,152	0.8	$21,996	$113,527,333
6244	Child Day Care Services	130	1,569	1.0	$18,148	$28,514,826
6243	Vocational Rehabilitation Services	27	1,096	0.9	$25,220	$27,635,709
6242	Community Food and Housing, and Emergency and Other Relief Services	21	185	0.6	$26,104	$4,836,638

Source: DEED, QCEW

the needs of healthcare employers, potentially impacting existing education systems. According to DEED's occupational staffing patterns data, roughly 30 percent of jobs at hospitals are registered nurses (RNs) while less than 8 percent of jobs in ambulatory health care services are RNs. So a migration of employment and services from hospitals to ambulatory health care services could signal a decrease in the future demand for RNs. However, things do not stay constant, and it's possible that the ambulatory health care services industry will need an increasing share of RNs to provide services that were historically provided by hospitals.

Figure 2. Healthcare and Social Assistance Employment Shift, 2007 - 2017, Central Minnesota

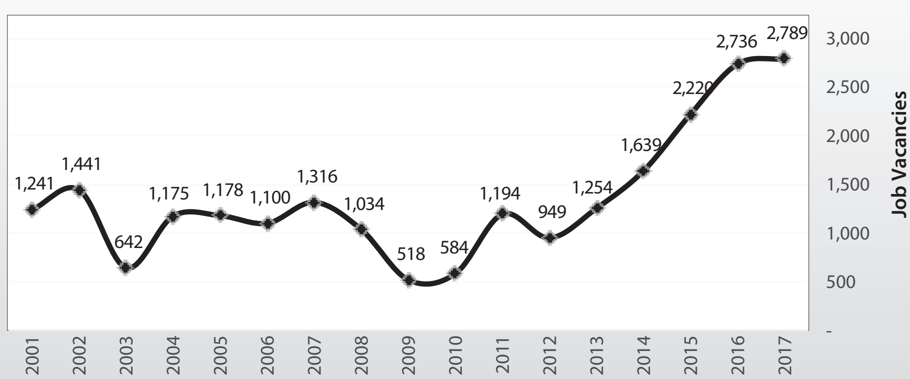


Source: DEED, Quarterly Census of Employment and Wages

Help Wanted

Job vacancy data also seem to point to large numbers of openings for occupations that are less common at hospitals. With almost 2,800 job openings in 2017, the Health Care and Social Assistance industry has twice as many openings compared to the historical norms (see Figure 3).

Figure 3. Healthcare and Social Assistance Job Vacancies in Central Minnesota



Source: DEED, Job Vacancy Survey

The most common healthcare opening is the personal care aide (PCA), with an average of 721 openings during 2017. Job vacancy data are collected during the second and fourth quarter, so averaging the median wage offer for the two quarters provides a typical starting wage of $11.47 per hour for PCAs, lower than the $13.82 median wage offer that's offered for all jobs in the area. About 28 percent of jobs in the social assistance industry are PCAs, making it the largest occupation in the subsector.

Another occupation with large numbers of vacancies is the certified nursing assistant (CNA), with almost 300 openings and an average median wage offer at $12.98 per hour. CNAs are the most common occupation at nursing and residential care facilities, accounting for 24 percent of all jobs in the subsector. Other occupations with many current job postings include RNs, licensed practical nurses (LPNs), and home health aides (HHAs), which are all employed in large numbers in multiple subsectors.

Education Opportunities

Opportunity abounds in health care for potential workers without a bachelor's degree. In fact, none of the top five occupations with the most openings require education beyond an associate's degree, despite accounting for roughly 58 percent of openings in the Health Care and Social Assistance industry. Only RN positions require a two- year associate degree, while CNAs and LPNs typically require vocational training, and PCA and HHA positions can be attained with a high school diploma or less.

The varying amount of educational requirements in the top five occupations with the most openings provide excellent ramps to move up the career ladder or laterally to explore different fields within the industry.

Man Up

The Health Care and Social Assistance industry is notoriously female dominated, more so than any other industry in Central Minnesota. Almost 85 percent of jobs in Health Care and Social Assistance are held by women. Men have been filling a larger share of jobs over time, but the rate of change is incredibly slow, amounting to a single point increase in the 13 years from 2003 to 2016. At that rate of change it would take 421 years to reach the ratio found in the region's overall economy (48.4% male and 51.6% female).

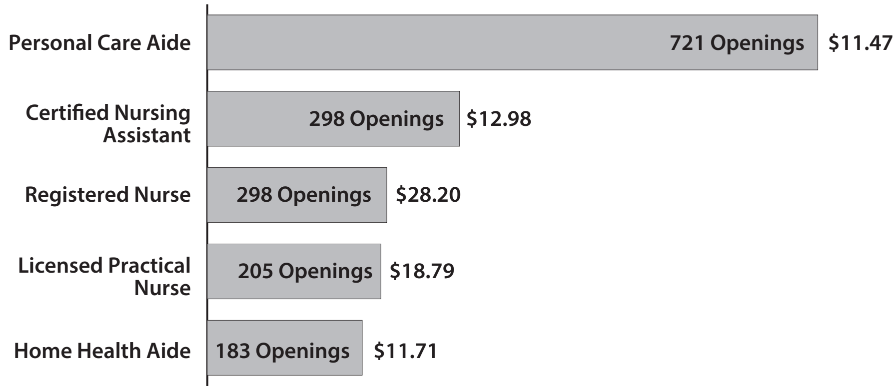
The occupations commonly pursued and held by men and women influence not only the share of employment for each gender, but also wages. While women have been the primary workers in Health Care and Social Assistance, the median hourly wage for men has been higher. The gap was 20 percent in 2003 but nearly reached parity by 2008. Most recently jobs held by men had median hourly wages that were only 0.3 percent more than jobs held by women.

Keep in mind that this is not comparing the same occupation, but reflects the median wage – 50 percent earn more, and 50 percent earn less – for all workers in the industry. For instance, 87 percent of lower-paying nursing, psychiatric, and home health aide jobs are held by women, but only 40 percent of higher-paying physician jobs are held by females. The large differences in the amount of jobs held by each gender and their respective wages explain a significant amount of the wage gap. Thus, the wage parity occurring could be from more women pursuing higher paid occupations like physicians, or it could be from men holding larger numbers of lower paid occupations such as PCAs, HHAs, or CNAs, or some combination of both scenarios (see Figure 5).

In conclusion, the Health Care and Social Assistance industry has an abundance of job openings at varying education levels. The shift within healthcare is placing high demand on a few select occupations with large numbers of openings. In spite of a finite amount of available labor, recruiting more men into healthcare occupations could not only help ease the difficulty in filling some of the most prevalent types of job openings, but would also better reflect the population that Health Care and Social Assistance organizations serve.

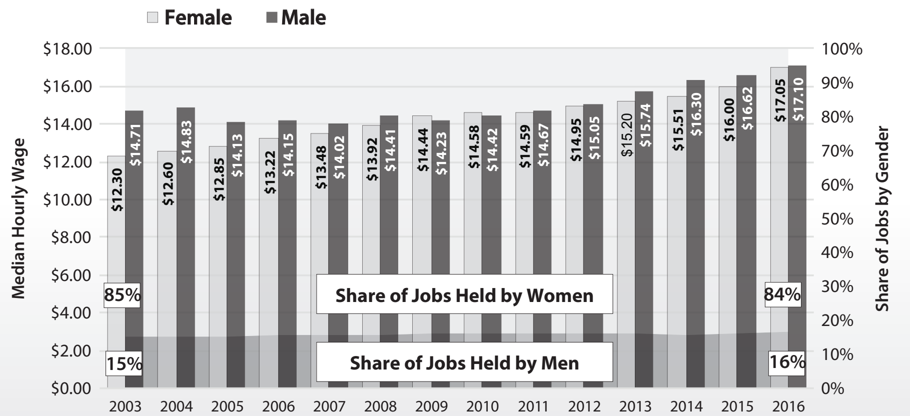
by Luke Greiner

Figure 4. Top Five Job Openings in Healthcare Fields in Central Minnesota



Source: DEED, Job Vacancy Survey

Figure 5. Wage and Share of Employment in Healthcare and Social Assistance Industry, Central Minnesota



Source: DEED, Quarterly Employment Demographics

Regional Spotlight CENTRAL MINNESOTA

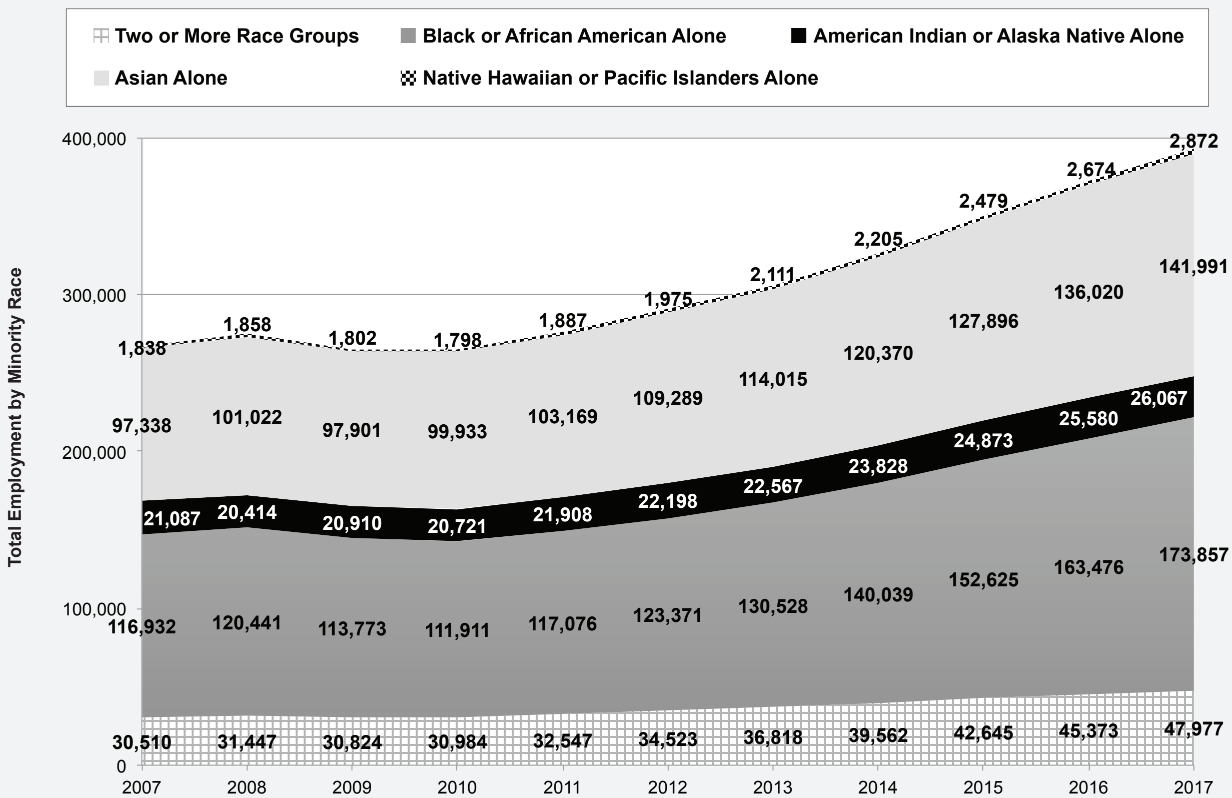
Workforce Diversity

As part of their regional planning efforts, the state's local Workforce Development Boards (WDBs) have been taking a much closer look at the racial and ethnic diversity of their regions. This includes analysis of each area's changing demographics, increasing labor force tightness, and industry employment trends. Data show that every region's population is becoming more racially and ethnically diverse over time which is also reflected in the workforce.

The chart below shows employment growth by minority race since 2007. With the online version users can select their geography, industry, race, and ethnicity to see current data and recent trends.

https://public.tableau.com/profile/magda.olson#!/vizhome/QWI-Race_byWSA/Story1

Employment by Minority Race in All NAICS Sectors, Minnesota



Source: DEED, Census LEHD Quarterly Workforce Indicators

by Cameron Macht

Labor Force Estimates

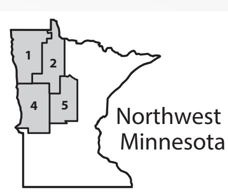
County/ Area	Labor Force			Employment			Unemployment			Rate of Unemployment		
	Apr 2018	Mar 2018	Apr 2017	Apr 2018	Mar 2018	Apr 2017	Apr 2018	Mar 2018	Apr 2017	Apr 2018	Mar 2018	Apr 2017
United States ('000s)												
(Seasonally adjusted)	161,527	161,763	160,181	155,181	155,178	153,161	6,346	6,585	7,021	3.9%	4.1%	4.4%
(Unadjusted)	161,280	161,548	159,817	155,348	154,877	153,262	5,932	6,671	6,555	3.7	4.1	4.1
Minnesota												
(Seasonally adjusted)	3,100,993	3,093,831	3,058,271	3,001,827	2,994,723	2,950,655	99,166	99,108	107,616	3.2	3.2	3.5
(Unadjusted)	3,100,740	3,100,350	3,051,011	3,003,974	2,983,284	2,946,439	96,766	117,066	104,572	3.1	3.8	3.4
Metropolitan Statistical Areas (MSA)*												
Mpls.-St. Paul MSA	2,011,274	2,011,713	1,957,763	1,956,091	1,946,260	1,892,410	55,183	65,453	65,353	2.7	3.3	3.3
Duluth-Superior MSA	146,258	146,916	141,994	140,258	139,895	134,555	6,000	7,021	7,439	4.1	4.8	5.2
Rochester MSA	121,045	122,235	119,297	117,697	118,088	115,626	3,348	4,147	3,671	2.8	3.4	3.1
St. Cloud MSA	114,805	114,709	111,110	110,994	109,975	106,946	3,811	4,734	4,164	3.3	4.1	3.7
Mankato-N Mankato MSA	62,672	62,866	60,382	61,132	60,978	58,660	1,540	1,888	1,722	2.5	3.0	2.9
Fargo-Moorhead MSA	138,783	139,587	138,159	135,039	135,295	134,952	3,744	4,292	3,207	2.7	3.1	2.3
Grand Forks MSA	56,195	56,701	56,357	54,565	54,833	54,769	1,630	1,868	1,588	2.9	3.3	2.8
Region One	**47,492**	**48,017**	**48,164**	**45,217**	**45,025**	**45,135**	**2,275**	**2,992**	**3,029**	**4.8**	**6.2**	**6.3**
Kittson	2,375	2,361	2,364	2,292	2,260	2,260	83	101	104	3.5	4.3	4.4
Marshall	5,510	5,628	5,632	5,121	5,072	5,132	389	556	500	7.1	9.9	8.9
Norman	3,355	3,354	3,437	3,192	3,156	3,258	163	198	179	4.9	5.9	5.2
Pennington	8,828	9,073	9,278	8,393	8,389	8,418	435	684	860	4.9	7.5	9.3
Polk	17,191	17,296	17,006	16,473	16,435	16,235	718	861	771	4.2	5.0	4.5
Red Lake	2,261	2,292	2,367	2,124	2,085	2,150	137	207	217	6.1	9.0	9.2
Roseau	7,972	8,013	8,080	7,622	7,628	7,682	350	385	398	4.4	4.8	4.9
Region Two	**44,206**	**44,106**	**43,066**	**41,772**	**41,153**	**40,507**	**2,434**	**2,953**	**2,559**	**5.5**	**6.7**	**5.9**
Beltrami	24,358	24,230	23,935	23,200	22,836	22,697	1,158	1,394	1,238	4.8	5.8	5.2
Clearwater	4,776	4,868	4,696	4,295	4,246	4,221	481	622	475	10.1	12.8	10.1
Hubbard	10,386	10,175	9,695	9,837	9,492	9,124	549	683	571	5.3	6.7	5.9
Lake of the Woods	2,255	2,401	2,317	2,137	2,304	2,174	118	97	143	5.2	4.0	6.2
Mahnomen	2,431	2,432	2,423	2,303	2,275	2,291	128	157	132	5.3	6.5	5.4
Region Three	**166,742**	**167,420**	**160,779**	**159,078**	**158,404**	**150,947**	**7,664**	**9,016**	**9,832**	**4.6**	**5.4**	**6.1**
Aitkin	7,391	7,406	6,998	6,883	6,794	6,460	508	612	538	6.9	8.3	7.7
Carlton	18,241	18,325	17,446	17,341	17,267	16,475	900	1,058	971	4.9	5.8	5.6
Cook	3,408	3,334	2,874	3,269	3,171	2,722	139	163	152	4.1	4.9	5.3
Itasca	21,875	22,065	21,268	20,521	20,450	19,377	1,354	1,615	1,891	6.2	7.3	8.9
Koochiching	6,048	6,099	6,033	5,583	5,657	5,445	465	442	588	7.7	7.2	9.7
Lake	5,677	5,662	5,115	5,497	5,427	4,859	180	235	256	3.2	4.2	5.0
St. Louis	104,102	104,529	101,045	99,984	99,638	95,609	4,118	4,891	5,436	4.0	4.7	5.4
City of Duluth	46,748	46,832	44,945	45,393	45,236	43,217	1,355	1,596	1,728	2.9	3.4	3.8
Balance of St. Louis County	57,354	57,697	56,100	54,591	54,402	52,392	2,763	3,295	3,708	4.8	5.7	6.6
Region Four	**129,842**	**129,105**	**125,770**	**125,234**	**123,349**	**121,018**	**4,608**	**5,756**	**4,752**	**3.5**	**4.5**	**3.8**
Becker	19,083	19,081	18,107	18,297	18,069	17,304	786	1,012	803	4.1	5.3	4.4
Clay	36,295	36,437	35,924	35,118	35,011	34,709	1,177	1,426	1,215	3.2	3.9	3.4
Douglas	21,063	20,831	19,928	20,403	20,026	19,211	660	805	717	3.1	3.9	3.6
Grant	3,345	3,280	3,256	3,180	3,081	3,113	165	199	143	4.9	6.1	4.4
Otter Tail	32,536	32,217	31,139	31,232	30,539	29,785	1,304	1,678	1,354	4.0	5.2	4.3
Pope	6,506	6,366	6,281	6,311	6,130	6,077	195	236	204	3.0	3.7	3.2
Stevens	5,560	5,511	5,588	5,428	5,333	5,447	132	178	141	2.4	3.2	2.5
Traverse	1,849	1,814	1,822	1,777	1,730	1,755	72	84	67	3.9	4.6	3.7
Wilkin	3,605	3,568	3,725	3,488	3,430	3,617	117	138	108	3.2	3.9	2.9
Region Five	**87,136**	**86,158**	**82,511**	**82,893**	**80,722**	**78,207**	**4,243**	**5,436**	**4,304**	**4.9**	**6.3**	**5.2**
Cass	15,409	15,076	14,129	14,569	13,989	13,242	840	1,087	887	5.5	7.2	6.3
Crow Wing	33,850	33,215	31,360	32,434	31,363	29,885	1,416	1,852	1,475	4.2	5.6	4.7
Morrison	18,084	18,113	17,814	17,094	16,814	16,783	990	1,299	1,031	5.5	7.2	5.8
Todd	13,904	13,869	13,058	13,298	13,141	12,485	606	728	573	4.4	5.2	4.4
Wadena	5,889	5,885	6,150	5,498	5,415	5,812	391	470	338	6.6	8.0	5.5
Region Six East	**68,128**	**67,973**	**64,869**	**65,540**	**64,778**	**62,171**	**2,588**	**3,195**	**2,698**	**3.8**	**4.7**	**4.2**
Kandiyohi	25,407	25,282	24,094	24,557	24,191	23,225	850	1,091	869	3.3	4.3	3.6
McLeod	19,686	19,651	19,163	18,966	18,765	18,362	720	886	801	3.7	4.5	4.2
Meeker	13,562	13,492	13,186	12,970	12,796	12,586	592	696	600	4.4	5.2	4.6
Renville	9,473	9,548	8,426	9,047	9,026	7,998	426	522	428	4.5	5.5	5.1

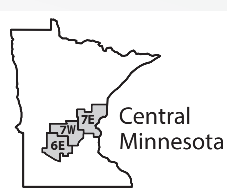
*Minneapolis-St. Paul Metropolitan Statistical Area (MSA) now includes Sherburne County in Minnesota and Pierce County in Wisconsin. St. Cloud MSA is now comprised of Benton and Stearns counties.

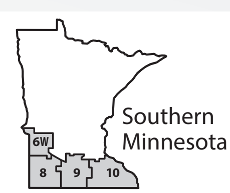
Labor Force Estimates

Numbers are unadjusted unless otherwise labeled.
Source: Department of Employment and Economic Development,
Local Area Unemployment Statistics, and North Dakota Job Service, 2018.

County/ Area	Labor Force			Employment			Unemployment			Rate of Unemployment		
	Apr 2018	Mar 2018	Apr 2017	Apr 2018	Mar 2018	Apr 2017	Apr 2018	Mar 2018	Apr 2017	Apr 2018	Mar 2018	Apr 2017
Region Six West	**23,600**	**23,536**	**23,774**	**22,675**	**22,360**	**22,756**	**925**	**1,176**	**1,018**	**3.9%**	**5.0%**	**4.3%**
Big Stone	2,682	2,683	2,680	2,570	2,525	2,554	112	158	126	4.2	5.9	4.7
Chippewa	6,946	6,970	7,016	6,681	6,639	6,687	265	331	329	3.8	4.7	4.7
Lac Qui Parle	3,557	3,528	3,624	3,411	3,348	3,487	146	180	137	4.1	5.1	3.8
Swift	5,127	5,066	5,083	4,890	4,788	4,838	237	278	245	4.6	5.5	4.8
Yellow Medicine	5,288	5,289	5,371	5,123	5,060	5,190	165	229	181	3.1	4.3	3.4
Region Seven East	**89,104**	**89,623**	**86,480**	**84,677**	**84,000**	**81,851**	**4,427**	**5,623**	**4,629**	**5.0**	**6.3**	**5.4**
Chisago	30,039	30,172	29,121	28,869	28,692	27,887	1,170	1,480	1,234	3.9	4.9	4.2
Isanti	21,338	21,475	20,559	20,426	20,318	19,601	912	1,157	958	4.3	5.4	4.7
Kanabec	9,263	9,353	9,007	8,608	8,521	8,352	655	832	655	7.1	8.9	7.3
Mille Lacs	13,167	13,309	12,813	12,382	12,306	12,033	785	1,003	780	6.0	7.5	6.1
Pine	15,297	15,314	14,980	14,392	14,163	13,978	905	1,151	1,002	5.9	7.5	6.7
Region Seven West	**242,411**	**242,692**	**234,336**	**234,225**	**232,539**	**225,401**	**8,186**	**10,153**	**8,935**	**3.4**	**4.2**	**3.8**
Benton	22,612	22,648	21,864	21,717	21,514	20,895	895	1,134	969	4.0	5.0	4.4
Sherburne	52,260	52,471	50,232	50,441	50,196	48,196	1,819	2,275	2,036	3.5	4.3	4.1
Stearns	92,193	92,061	89,246	89,277	88,461	86,051	2,916	3,600	3,195	3.2	3.9	3.6
Wright	75,346	75,512	72,994	72,790	72,368	70,259	2,556	3,144	2,735	3.4	4.2	3.7
Region Eight	**64,783**	**64,319**	**65,022**	**62,613**	**61,632**	**62,730**	**2,170**	**2,687**	**2,292**	**3.3**	**4.2**	**3.5**
Cottonwood	5,494	5,463	5,298	5,291	5,228	5,043	203	235	255	3.7	4.3	4.8
Jackson	5,662	5,679	5,966	5,497	5,471	5,769	165	208	197	2.9	3.7	3.3
Lincoln	3,362	3,324	3,359	3,240	3,158	3,237	122	166	122	3.6	5.0	3.6
Lyon	15,221	15,062	15,245	14,733	14,485	14,711	488	577	534	3.2	3.8	3.5
Murray	5,007	4,931	4,859	4,782	4,632	4,639	225	299	220	4.5	6.1	4.5
Nobles	11,411	11,396	11,284	11,102	11,015	10,930	309	381	354	2.7	3.3	3.1
Pipestone	5,102	4,989	4,841	4,914	4,738	4,653	188	251	188	3.7	5.0	3.9
Redwood	7,536	7,507	8,315	7,212	7,115	8,008	324	392	307	4.3	5.2	3.7
Rock	5,988	5,968	5,855	5,842	5,790	5,740	146	178	115	2.4	3.0	2.0
Region Nine	**136,019**	**136,198**	**132,861**	**131,414**	**130,470**	**127,905**	**4,605**	**5,728**	**4,956**	**3.4**	**4.2**	**3.7**
Blue Earth	41,423	41,592	39,891	40,367	40,285	38,690	1,056	1,307	1,201	2.5	3.1	3.0
Brown	14,807	14,750	14,817	14,222	14,003	14,189	585	747	628	4.0	5.1	4.2
Faribault	7,296	7,300	7,116	7,004	6,947	6,784	292	353	332	4.0	4.8	4.7
Le Sueur	16,154	16,235	15,816	15,280	15,173	14,951	874	1,062	865	5.4	6.5	5.5
Martin	10,436	10,354	10,347	10,101	9,948	9,975	335	406	372	3.2	3.9	3.6
Nicollet	21,249	21,274	20,491	20,765	20,693	19,970	484	581	521	2.3	2.7	2.5
Sibley	8,633	8,640	8,538	8,332	8,252	8,205	301	388	333	3.5	4.5	3.9
Waseca	9,584	9,595	9,305	9,155	9,038	8,912	429	557	393	4.5	5.8	4.2
Watonwan	6,437	6,458	6,540	6,188	6,131	6,229	249	327	311	3.9	5.1	4.8
Region Ten	**283,145**	**283,846**	**280,430**	**275,109**	**273,828**	**271,373**	**8,036**	**10,018**	**9,057**	**2.8**	**3.5**	**3.2**
Dodge	11,627	11,759	11,482	11,229	11,251	11,073	398	508	409	3.4	4.3	3.6
Fillmore	11,506	11,615	11,348	11,095	11,082	10,944	411	533	404	3.6	4.6	3.6
Freeborn	16,240	16,238	16,185	15,703	15,566	15,583	537	672	602	3.3	4.1	3.7
Goodhue	27,063	27,177	26,661	26,264	26,182	25,742	799	995	919	3.0	3.7	3.4
Houston	10,879	10,782	10,600	10,565	10,341	10,219	314	441	381	2.9	4.1	3.6
Mower	20,797	20,792	20,627	20,244	20,097	19,994	553	695	633	2.7	3.3	3.1
Olmsted	85,868	86,719	84,494	83,733	84,124	82,060	2,135	2,595	2,434	2.5	3.0	2.9
City of Rochester	63,246	63,853	61,937	61,756	62,044	60,229	1,490	1,809	1,708	2.4	2.8	2.8
Rice	37,507	37,376	36,624	36,422	36,051	35,435	1,085	1,325	1,189	2.9	3.5	3.2
Steele	20,029	19,975	20,935	19,345	19,146	20,207	684	829	728	3.4	4.2	3.5
Wabasha	12,044	12,142	11,973	11,640	11,631	11,549	404	511	424	3.4	4.2	3.5
Winona	29,585	29,271	29,501	28,869	28,357	28,567	716	914	934	2.4	3.1	3.2
Region Eleven	**1,718,141**	**1,717,358**	**1,672,400**	**1,673,536**	**1,665,025**	**1,618,125**	**44,605**	**52,333**	**54,275**	**2.6**	**3.0**	**3.2**
Anoka	197,403	197,693	192,574	191,688	190,771	185,742	5,715	6,922	6,832	2.9	3.5	3.5
Carver	57,926	57,892	55,897	56,415	56,095	54,151	1,511	1,797	1,746	2.6	3.1	3.1
Dakota	241,995	242,097	235,507	235,683	234,585	228,039	6,312	7,512	7,468	2.6	3.1	3.2
Hennepin	704,582	703,495	685,684	687,160	683,478	663,889	17,422	20,017	21,795	2.5	2.8	3.2
City of Bloomington	47,096	47,053	46,770	45,865	45,620	45,235	1,231	1,433	1,535	2.6	3.0	3.3
City of Minneapolis	240,526	240,143	234,505	234,536	233,280	226,826	5,990	6,863	7,679	2.5	2.9	3.3
Ramsey	290,069	289,954	283,233	282,326	280,871	273,635	7,743	9,083	9,598	2.7	3.1	3.4
City of St. Paul	159,078	159,015	155,297	154,745	153,947	149,912	4,333	5,068	5,385	2.7	3.2	3.5
Scott	83,220	83,267	80,282	81,034	80,638	77,823	2,186	2,629	2,459	2.6	3.2	3.1
Washington	142,946	142,960	139,223	139,230	138,587	134,846	3,716	4,373	4,377	2.6	3.1	3.1







Industrial Analysis

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

Overview

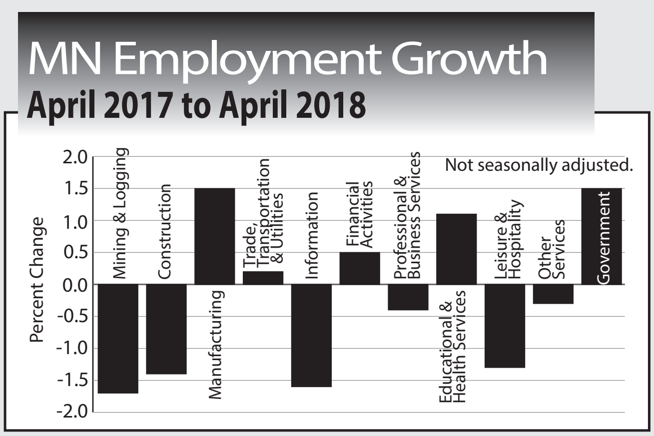
Minnesota employers lost 3,200 (0.1 percent) jobs in April on a seasonally adjusted basis. Private Service Providers drove the decline, off by 3,900 (0.2 percent), with notable losses in Leisure and Hospitality (down 3,600 or 1.3 percent) and Trade, Transportation, and Utilities (down 2,000 or 0.4 percent). It is likely that our uncommonly cold and snowy April had a hand in the seasonal job losses. On an over-the-year basis Minnesota employers added 11,659 jobs (0.4 percent). This is a marked decrease in over-the-year growth from March's 0.7 percent. Every month in 2017 showed over-the-year growth of 1 percent or more. Goods Producers added 2,981 jobs (0.7 percent) on the year, while Service Providers added 8,687 (0.4 percent).

Mining and Logging

Mining and Logging employment was flat in April, holding steady at 6,500 jobs. Annually the supersector lost 107 jobs (1.7 percent). It was the fourth consecutive month of over-the-year job losses in Mining and Logging.

Construction

Employment in Construction was off by 400 jobs (0.3 percent) in April, while March's estimate was revised down from a loss of 1,000 to a loss of 1,500. It is possible that the declines were caused in part by winter weather that continued further into spring than is usual. Annually the supersector lost 1,627 jobs (1.4 percent). Heavy and Civil Engineering construction saw the most notable declines, off by 1,963 jobs (13 percent), again likely from the inclement weather. Employment in the component sector grew by more than 40 percent in each of the previous three Aprils, while growing by just 23.1 percent in April 2018, accounting for the extreme drop in over-the-year growth this year. Similar if less extreme dynamics were present in other component sectors.



Source: Department of Employment and Economic Development, Current Employment Statistics, 2018.

Manufacturing

Employment in the Manufacturing supersector was up by 900 (0.3 percent) in April. Durable Goods Manufacturers added 800 jobs (0.4 percent), and Non-Durable Goods Manufacturers added 100 (0.1 percent). It was the fourth consecutive month of seasonally adjusted over-the-month growth in the supersector. Annually Manufacturers added 4,715 jobs (1.5 percent). Durable Goods Manufacturers added 2,787 jobs (1.4 percent), and Non-Durable Goods Manufacturers added 1,928 (1.7 percent), with 1,410 of those jobs coming in Food Manufacturing.

Trade, Transportation , and Utilities

Trade, Transportation, and Utilities employment was off by 2,000 (0.4 percent) in April. The lion's share of the decline came in the Retail Trade sector, which lost 1,800 jobs (0.6 percent). Wholesale Trade lost 300 jobs (0.2 percent) while Transportation, Warehousing, and Utilities added 100 (0.1 percent). On an annual basis the supersector added 1,254 jobs (0.2 percent). This was down sharply from March's 1.4 percent over-the-year growth, as the employment spike the industry group generally sees in April had yet to materialize. Wholesale Trade added 1,395 jobs (1.1 percent) on the year, and Transportation, Warehousing, and Utilities added 1,498 (1.4 percent). On the other side of the ledger, Retail Trade employers lost 1,639 jobs (0.6 percent).

Information

Employment in the Information supersector was flat in April, remaining at 49,500 jobs after March saw a 400-job increase. Annually the supersector lost 789 jobs (1.6 percent). It was the 10th consecutive month of over-the-year declines for the supersector.

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

Financial Activities

Employment in the Financial Activities supersector was up by 1,200 (0.7 percent) in April. Finance and Insurance added 1,000 jobs (0.7 percent), and Real Estate and Rental and Leasing added 200 (0.6 percent). On the year the supersector added 873 jobs (0.5 percent). Real Estate and Rental and Leasing added 824 jobs (2.4 percent), a majority of the supersector's growth. Employment in Finance and Insurance was largely unmoved on the surface, up by 39 jobs (0 percent), although that belied significant turbulence among its component industries. For instance, Credit Intermediation and Related Activities including Monetary Authorities lost 1,242 jobs (1.9 percent).

Professional and Business Services

Professional and Business Services employment was off by 700 (0.2 percent) in April. Administrative and Support and Waste Management and Remediation Services was responsible for the entirety of the decline, shedding 2,000 jobs (1.5 percent). The other two component sectors grew on the month, with Professional, Scientific, and Technical Services adding 900 jobs (0.6 percent) and Management of Companies and Enterprises adding 400 (0.5 percent). Annually the supersector lost 1,352 jobs (0.4 percent). Administrative and Support and Waste Management and Remediation Services lost 1,871 jobs (1.4 percent), accounting for most of the supersector's annual job loss.

Educational and Health Services

Educational and Health Services employment was off by 200 (0 percent) in April. Health Care and Social Assistance added 600 jobs, but Educational Services lost 800 (1.2 percent). On the year the supersector added 6,097 jobs (1.1 percent). Educational Services employment grew by 1,306 (1.9 percent) while Health Care and Social Assistance grew by 4,791 (1 percent).

Leisure and Hospitality

Leisure and Hospitality employment dropped precipitously in April as the supersector shed 3,600 jobs (1.3 percent). It was the largest decline, both in proportional and real job terms, in any supersector in the state. Component Arts, Entertainment, and Recreation shed 2,500 jobs (5.3 percent). Annually the supersector lost 3,314 jobs (1.3 percent). Arts, Entertainment, and Recreation lost 1,211 jobs (2.8 percent), while Accommodations and Food Services lost 2,103 (0.9 percent).

Other Services

The Other Services supersector added 1,400 jobs (1.2 percent) in April on a seasonally adjusted basis. This increase balanced the March decrease of 1,100 (1.0 percent), suggesting a later-than-expected spring increase. Annually the supersector lost 388 jobs (0.3 percent). Repair and Maintenance lost 575 jobs (2.6 percent), while Religious, Grantmaking, Civic, Professional, and Similar Organizations added 208 (0.3 percent).

Government

Government employment was mostly flat in April as the supersector added 200 jobs (0.0 percent). Federal employers added 100 jobs (0.3 percent), and State employers added 200 (0.2 percent), while Local Governments lost 100 jobs (0.0 percent). Annually Government employers added 6,297 jobs (1.5 percent). State Government Educational Services led the way, adding 3,161 jobs (5 percent). Federal employers lost 48 jobs (0.1 percent).

by Nick Dobbins

Seasonally Adjusted Nonfarm Employment

In 1,000's

Industry	Apr 2018	Mar 2018	Feb 2018
Total Nonagricultural	**2,945.6**	**2,948.8**	**2,948.4**
Goods-Producing	**448.8**	**448.3**	**448.3**
Mining and Logging	6.5	6.5	6.6
Construction	119.9	120.3	121.8
Manufacturing	322.4	321.5	319.9
Service-Providing	**2,496.8**	**2,500.5**	**2,500.1**
Trade, Transportation, and Utilities	542.1	544.1	542.6
Information	49.5	49.5	49.1
Financial Activities	180.3	179.1	178.5
Professional and Business Services	372.5	373.2	373.0
Educational and Health Services	538.2	538.4	538.6
Leisure and Hospitality	270.0	273.6	274.3
Other Services	115.8	114.4	115.5
Government	428.4	428.2	428.5

Source: Department of Employment and Economic Development Current Employment Statistics, 2018.

Regional Analysis

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

Employment in the Minneapolis-St. Paul MSA was up by 18,708 (0.9 percent) in April. While sizeable, this actually marked the lowest proportional April employment increase in the metro since 2013. As would be expected in the spring, Mining, Logging, and Construction employment was up by 6.8 percent (4,727 jobs), although this is also a smaller proportional increase than we have seen in recent Aprils, perhaps caused by our late snowfalls this year. Only three supersectors contracted on the month (Government, Information, and Trade, Transportation, and Utilities), and they combined to lose just 841 total jobs. Over the year the metro area added 13,676 jobs (0.7 percent). Mining, Logging, and Construction had the largest proportional decline, off by 3.2 percent (2,471 jobs) from April of 2017 from smaller-than-usual spring employment growth this year. Professional and Business Services lost 3,598 jobs (1.1 percent), with declines in all three major component sectors. The largest real and proportional job increase came from Government employers, which added 6,031 jobs (2.4 percent), with all of that coming at the state and local level (up 2,993 or 4.5 percent and 3,062 or 1.9 percent, respectively), as federal employers shed 24 jobs, 0.1 percent. Educational and Health Services added 5,530 jobs (1.7 percent), with 3,644 additional jobs in Health Care and Social Assistance and 1,886 in Educational Services.

Duluth-Superior MSA

The Duluth-Superior MSA added 684 jobs (0.5 percent) in April. This was the lowest April over-the-month growth in the MSA since 2009. Increases were driven by Mining, Logging, and Construction (up 279 or 3.3 percent), Leisure and Hospitality (up 514, 3.8 percent), and Professional and Business Services (up 179, 2.3 percent). The largest over-the-month decline came in Educational and Health Services, which was off by 288 jobs (0.9 percent). Annually the Duluth MSA added 607 jobs (0.4 percent), a notable decrease from March's 1.2 percent over-the-year growth. Government employers added 577 jobs (2.1 percent), Manufacturers added 238 (3.3 percent), and Mining, Logging, and Construction added 262 (3.1 percent). The largest real loss came in Professional and Business Services (off by 3 percent or 245 jobs) while the biggest proportional decline came in the small Information supersector, which was down 5.5 percent from April of 2017 or 76 total jobs.

Rochester MSA

The Rochester MSA added 190 jobs (0.2 percent) in April. This was noticeably behind the statewide over-the-month growth of 0.8 percent, perhaps owing to a decline of 554 jobs (1.1 percent) in regional stalwart Educational and Health Services. Mining, Logging, and Construction saw the most growth in the region, adding 358 jobs (9.4 percent). Leisure and Hospitality employment was up by 255 (2.4 percent). Annually Rochester lost 704 jobs (0.6 percent). It was the only MSA primarily in Minnesota to lose jobs on an over-the-year basis (both of the MSAs we share with North Dakota lost jobs as well). Mining, Logging, and Construction had the largest proportional decline, off by 4.9 percent (216 jobs), while Educational and Health Services lost the most jobs, down 1,391 (2.8 percent).

St. Cloud MSA

Employment in the Saint Cloud MSA was up by 1,084 (1 percent) in April. It was the largest proportional over-the-month growth of any MSA in the state. The only supersector to lose jobs on the month was, surprisingly, Leisure and Hospitality, which was off by 111 (1.3 percent). This was the only MSA primarily in Minnesota in which Leisure and Hospitality employment declined in April. The largest growth in the MSA came in Mining, Logging, and Construction which added 418 jobs (7.2 percent). Annually the Saint Cloud MSA added 462 jobs (0.4 percent). The Manufacturing supersector employers added 576 jobs (3.8 percent), and Educational and Health Services added 719 (3.3 percent). The largest decline came in Leisure and Hospitality, which was off by 881 jobs or 9.5 percent.

Mankato-North Mankato MSA

The Mankato-North Mankato MSA added 263 jobs (0.4 percent) in April. The gains all came in the private sector (up 295, 0.6 percent) as public sector employment was off by 32 (0.3 percent). Goods producers added 216 jobs (2.2 percent), and service providers added 47 (0.1 percent). Annually the MSA added 901 jobs (1.6 percent). This was the largest proportional over-the-year growth in the state. Most of the growth came from the private sector, which added 880 jobs (1.8 percent) to the government's 21 jobs (0.2 percent).

Fargo-Moorhead MSA

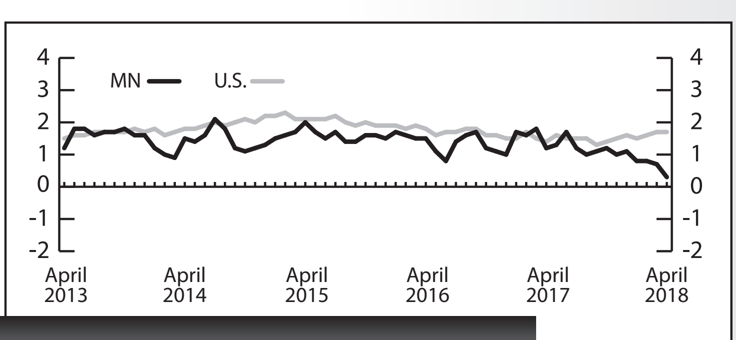
Employment in the Fargo-Moorhead MSA was up in April as the area added 785 jobs (0.6 percent). Mining, Logging, and Construction was the biggest driver of that growth, by a large margin, as the supersector added 605 jobs (7.9 percent). The next most notable gain came in Educational and Health Services, up 176 (0.7 percent). Annually the area lost 900 jobs (0.6 percent), in contrast to Minnesota's statewide Over-the-year growth of 0.4 percent. . Leisure and Hospitality employment was off by 775 (5.5 percent), and Professional and Business Services was down by 681 (4.3 percent).

Grand Forks-East Grand Forks MSA

The Grand Forks-East Grand Forks MSA added 178 jobs (0.3 percent) in April. As was the case in Fargo-Moorhead, the growth was led by Mining, Logging, and Construction employment (up 192 or 7.8 percent), with an assist from Trade, Transportation, and Utilities (up 150, 1.3 percent). Leisure and Hospitality employment dropped the farthest, both in total jobs and in proportional decline, off by 102 (1.9 percent). Annually the MSA lost 367 jobs (0.7 percent). Growth was strong in Manufacturing (up 279, 6.6 percent) and Professional and Business Services (up 219, 7.1 percent). However, those gains were more than erased by losses in other areas, including Government employment (down 353, 2.4 percent) and Leisure and Hospitality (down 650, 10.8 percent).

by Nick Dobbins

Source: Department of Employment and Economic Development, Current Employment Statistics, 2018; Bureau of Labor Statistics, U.S. Department of Labor, Current Employment Statistics, 2018.



Total Nonfarm Jobs
U.S. and MN over-the-year percent change

Employer Survey of Minnesota Nonfarm Payroll Jobs, Hours and Earnings

Numbers are unadjusted.

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

Industry	Jobs* (Thousands)			Percent Change From**		Production Workers Hours and Earnings: Average Weekly Earnings		Average Weekly Hours		Average Hourly Earnings	
	Apr 2018	Mar 2018	Apr 2017	Mar 2018	Apr 2017	Apr 2018	Apr 2017	Apr 2018	Apr 2017	Apr 2018	Apr 2017
TOTAL NONFARM WAGE AND SALARY	**2,924.7**	**2,901.9**	**2,913.1**	**0.8%**	**0.4%**	—	—	—	—	—	—
						—	—	—	—	—	—
GOODS-PRODUCING	**437.9**	**428.3**	**435.0**	**2.3**	**0.7**	—	—	—	—	—	—
Mining, Logging, and Construction	**6.2**	**6.2**	**6.3**	**0.1**	**-1.7**	—	—	—	—	—	—
Mining and Logging	**118.2**	**110.7**	**120.0**	**6.8**	**-1.4**	—	—	—	—	—	—
Construction	**112.0**	**104.5**	**113.7**	**7.2**	**-1.4**	—	—	—	—	—	—
Specialty Trade Contractors	74.1	69.7	73.3	6.3	1.0	$1,158.61	$1,233.02	36.4	38.4	$31.83	$ 32.11
Manufacturing	**319.7**	**317.5**	**315.0**	**0.7**	**1.5**	**872.81**	**839.67**	**40.9**	**41.1**	**21.34**	**20.43**
Durable Goods	202.2	200.6	199.4	0.8	1.4	923.94	863.46	41.6	41.0	22.21	21.06
Wood Product Manufacturing	11.3	11.1	11.1	2.0	1.5	—	—	—	—	—	—
Fabricated Metal Production	42.4	42.2	42.2	0.5	0.5	—	—	—	—	—	—
Machinery Manufacturing	32.9	32.7	32.8	0.4	0.3	—	—	—	—	—	—
Computer and Electronic Product	45.0	45.1	44.6	-0.2	0.8	—	—	—	—	—	—
Navigational, Measuring, Electromedical and Control	26.2	26.2	25.7	-0.1	1.6	—	—	—	—	—	—
Transportation Equipment	10.6	10.3	10.3	3.2	2.8	—	—	—	—	—	—
Medical Equipment and Supplies Manufacturing	16.3	16.2	16.1	0.0	0.7	—	—	—	—	—	—
Nondurable Goods	117.5	117.0	115.6	0.5	1.7	792.81	802.87	39.9	41.3	19.87	19.44
Food Manufacturing	47.4	46.9	46.0	1.0	3.1	—	—	—	—	—	—
SERVICE-PROVIDING	**2,486.8**	**2,473.6**	**2,478.1**	**0.5**	**0.4**	—	—	—	—	—	—
Trade, Transportation, and Utilities	**534.4**	**534.6**	**533.1**	**0.0**	**0.2**	—	—	—	—	—	—
Wholesale Trade	133.3	133.0	131.9	0.2	1.1	957.88	959.00	38.5	39.4	24.88	24.34
Retail Trade	294.1	294.6	295.7	-0.2	-0.6	444.54	426.67	28.1	28.2	15.82	15.13
Motor Vehicle and Parts	35.6	35.1	35.5	1.6	0.4	—	—	—	—	—	—
Building Material and Garden Equipment	26.9	25.4	27.1	6.0	-0.8	—	—	—	—	—	—
Food and Beverage Stores	56.1	56.6	55.4	-0.9	1.4	—	—	—	—	—	—
Gasoline Stations	24.9	24.8	24.9	0.7	0.2	—	—	—	—	—	—
General Merchandise Stores	59.1	59.4	58.7	-0.6	0.6	389.13	381.19	28.3	29.3	13.75	13.01
Transportation,Warehouse, Utilities	107.0	107.1	105.5	0.0	1.4	—	—	—	—	—	—
Transportation and Warehousing	94.7	94.7	93.2	-0.1	1.6	741.59	733.24	33.3	35.1	22.27	20.89
Information	**49.6**	**49.7**	**50.4**	**-0.3**	**-1.6**	**1,060.85**	**1,007.73**	**35.0**	**34.3**	**30.31**	**29.38**
Publishing Industries	18.8	18.8	19.2	0.0	-2.1	—	—	—	—	—	—
Telecommunications	13.1	13.0	13.3	0.2	-1.7	—	—	—	—	—	—
Financial Activities	**179.9**	**178.0**	**179.0**	**1.0**	**0.5**	—	—	—	—	—	—
Finance and Insurance	145.0	143.9	144.9	0.8	0.0	1,260.08	1,170.81	38.0	38.1	33.16	30.73
Credit Intermediation	62.8	62.4	64.0	0.6	-1.9	848.24	817.91	36.8	36.4	23.05	22.47
Securities, Commodity Contracts, and Other	19.9	19.5	19.4	1.8	2.4	—	—	—	—	—	—
Insurance Carriers and Related	62.3	61.9	61.5	0.6	1.3	—	—	—	—	—	—
Real Estate and Rental and Leasing	34.9	34.1	34.1	2.2	2.4	—	—	—	—	—	—
Professional and Business Services	**370.2**	**365.0**	**371.6**	**1.4**	**-0.4**	—	—	—	—	—	—
Professional, Scientific, and Technical Services	160.2	158.0	159.6	1.4	0.4	—	—	—	—	—	—
Legal Services	18.2	18.1	18.1	0.3	0.5	—	—	—	—	—	—
Accounting, Tax Preparation	17.7	17.7	17.5	-0.1	1.3	—	—	—	—	—	—
Computer Systems Design	34.9	34.6	36.7	1.0	-5.0	—	—	—	—	—	—
Management of Companies and Enterprises	79.4	78.6	79.5	1.0	-0.2	—	—	—	—	—	—
Administrative and Support Services	130.6	128.3	132.4	1.7	-1.4	—	—	—	—	—	—
Educational and Health Services	**541.2**	**540.0**	**535.1**	**0.2**	**1.1**	—	—	—	—	—	—
Educational Services	71.3	70.7	70.0	0.9	1.9	—	—	—	—	—	—
Health Care and Social Assistance	469.9	469.3	465.1	0.1	1.0	—	—	—	—	—	—
Ambulatory Health Care	154.2	154.6	152.6	-0.3	1.1	1,359.96	1,390.80	37.3	36.6	36.46	38.00
Offices of Physicians	74.7	74.6	73.0	0.2	2.4	—	—	—	—	—	—
Hospitals	112.4	112.3	111.0	0.0	1.3	—	—	—	—	—	—
Nursing and Residential Care Facilities	105.9	106.5	107.6	-0.5	-1.6	500.15	484.11	29.7	29.7	16.84	16.30
Social Assistance	97.3	95.8	93.9	1.6	3.7	—	—	—	—	—	—
Leisure and Hospitality	**261.6**	**256.9**	**264.9**	**1.8**	**-1.3**	—	—	—	—	—	—
Arts, Entertainment, and Recreation	41.6	40.6	42.8	2.4	-2.8	—	—	—	—	—	—
Accommodation and Food Services	220.0	216.3	222.1	1.7	-0.9	—	—	—	—	—	—
Food Services and Drinking Places	193.2	190.5	196.0	1.4	-1.4	272.90	267.10	19.3	19.8	14.14	13.49
Other Services	**115.9**	**114.3**	**116.3**	**1.4**	**-0.3**	—	—	—	—	—	—
Religious, Grantmaking, Civic, Professional Organizations	64.6	63.7	64.4	1.4	0.3	—	—	—	—	—	—
Government	**434.1**	**435.1**	**427.8**	**-0.2**	**1.5**						
Federal Government	32.0	31.8	32.1	0.6	-0.1						
State Government	105.9	105.5	102.5	0.4	3.3						
State Government Education	66.1	65.8	62.9	0.4	5.0						
Local Government	296.1	297.8	293.1	-0.6	1.0						
Local Government Education	151.1	154.1	149.3	-2.0	1.2						

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

* Totals may not add because of rounding.

** Percent change based on unrounded numbers.

Source: Department of Employment and Economic Development, Current Employment Statistics, 2018.

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

Numbers are unadjusted.

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

Industry	Jobs* (Thousands)			Percent Change From**		Production Workers Hours and Earnings: Average Weekly Earnings		Average Weekly Hours		Average Hourly Earnings	
	Apr 2018	Mar 2018	Apr 2017	Mar 2018	Apr 2017	Apr 2018	Apr 2017	Apr 2018	Apr 2017	Apr 2018	Apr 2017
TOTAL NONFARM WAGE AND SALARY	**1,990.25**	**1,971.54**	**1,976.57**	**0.9%**	**0.7%**	—	—	—	—	—	—
GOODS-PRODUCING	**271.98**	**265.88**	**271.43**	**2.3**	**0.2**	—	—	—	—	—	—
Mining, Logging, and Construction	**74.26**	**69.54**	**76.74**	**6.8**	**-3.2**	—	—	—	—	—	—
Construction of Buildings	16.91	16.53	16.89	2.3	0.1	—	—	—	—	—	—
Specialty Trade Contractors	51.18	47.42	51.41	7.9	-0.5	$1,166.50	$1,286.33	34.8	37.9	$33.52	$33.94
Manufacturing	**197.71**	**196.35**	**194.70**	**0.7**	**1.5**	**926.79**	**896.13**	**42.3**	**41.7**	**21.91**	**21.49**
Durable Goods	134.36	133.47	132.47	0.7	1.4	970.57	902.11	42.7	41.4	22.73	21.79
Fabricated Metal Production	29.50	29.33	29.42	0.6	0.3	—	—	—	—	—	—
Machinery Manufacturing	20.15	20.05	20.03	0.5	0.6	—	—	—	—	—	—
Computer and Electronic Product	36.73	36.71	36.19	0.0	1.5	—	—	—	—	—	—
Navigational, Measuring, Electromedical and Control	24.56	24.61	24.15	-0.2	1.7	—	—	—	—	—	—
Medical Equipment and Supplies Manufacturing	15.53	15.51	14.92	0.2	4.1	—	—	—	—	—	—
Nondurable Goods	63.35	62.88	62.23	0.8	1.8	840.79	883.25	41.5	42.2	20.26	20.93
Food Manufacturing	15.09	14.89	14.39	1.3	4.8	—	—	—	—	—	—
Printing and Related	14.28	14.29	14.63	-0.1	-2.4	—	—	—	—	—	—
SERVICE-PROVIDING	**1,718.27**	**1,705.66**	**1,705.14**	**0.7**	**0.8**	—	—	—	—	—	—
Trade, Transportation, and Utilities	**360.78**	**361.02**	**357.96**	**-0.1**	**0.8**	—	—	—	—	—	—
Wholesale Trade	98.22	98.20	96.59	0.0	1.7	967.30	977.15	37.8	39.9	25.59	24.49
Merchant Wholesalers - Durable Goods	49.76	49.73	48.55	0.1	2.5	—	—	—	—	—	—
Merchant Wholesalers - Nondurable Goods	28.43	28.32	28.57	0.4	-0.5	—	—	—	—	—	—
Retail Trade	188.33	188.29	187.86	0.0	0.2	472.30	451.94	29.5	29.5	16.01	15.32
Food and Beverage Stores	34.81	34.81	34.23	0.0	1.7	—	—	—	—	—	—
General Merchandise Stores	37.58	37.77	36.00	-0.5	4.4	375.06	366.90	28.2	30.0	13.30	12.23
Transportation, Warehouse, Utilities	74.24	74.54	73.50	-0.4	1.0	—	—	—	—	—	—
Utilities	7.48	7.47	7.47	0.1	0.1	—	—	—	—	—	—
Transportation and Warehousing	66.76	67.07	66.03	-0.5	1.1	779.33	699.48	35.2	34.8	22.14	20.10
Information	**37.23**	**37.24**	**38.01**	**0.0**	**-2.0**						
Publishing Industries	15.03	14.97	15.15	0.4	-0.8	—	—	—	—	—	—
Telecommunications	8.29	8.31	8.68	-0.2	-4.6	—	—	—	—	—	—
Financial Activities	**146.48**	**144.84**	**144.55**	**1.1**	**1.3**	—	—	—	—	—	—
Finance and Insurance	117.76	117.05	117.21	0.6	0.5	1,270.03	1,263.57	37.9	38.5	33.51	32.82
Credit Intermediation	46.65	46.68	47.95	-0.1	-2.7	—	—	—	—	—	—
Securities, Commodity Contracts, and Other	17.74	17.48	17.37	1.5	2.1	—	—	—	—	—	—
Insurance Carriers and Related	53.37	52.89	51.88	0.9	2.9	—	—	—	—	—	—
Real Estate and Rental and Leasing	28.73	27.80	27.35	3.3	5.0	—	—	—	—	—	—
Professional and Business Services	**316.29**	**311.80**	**319.89**	**1.4**	**-1.1**	—	—	—	—	—	—
Professional, Scientific, and Technical Services	138.94	138.16	139.34	0.6	-0.3	—	—	—	—	—	—
Legal Services	15.61	15.59	15.49	0.1	0.8	—	—	—	—	—	—
Architectural, Engineering, and Related	19.05	18.79	18.51	1.4	2.9	—	—	—	—	—	—
Computer Systems Design	32.24	32.37	33.80	-0.4	-4.6	—	—	—	—	—	—
Management of Companies and Enterprises	71.44	70.84	72.83	0.8	-1.9	—	—	—	—	—	—
Administrative and Support Services	105.91	102.80	107.72	3.0	-1.7	—	—	—	—	—	—
Employment Services	47.08	46.15	49.78	2.0	-5.4	—	—	—	—	—	—
Educational and Health Services	**336.24**	**334.17**	**330.71**	**0.6**	**1.7**	—	—	—	—	—	—
Educational Services	47.76	46.67	45.87	2.3	4.1	—	—	—	—	—	—
Health Care and Social Assistance	288.49	287.50	284.84	0.3	1.3	—	—	—	—	—	—
Ambulatory Health Care	91.16	91.59	90.81	-0.5	0.4	—	—	—	—	—	—
Hospitals	67.32	67.21	66.01	0.2	2.0	—	—	—	—	—	—
Nursing and Residential Care Facilities	59.51	59.27	59.94	0.4	-0.7	—	—	—	—	—	—
Social Assistance	70.50	69.43	68.10	1.5	3.5	—	—	—	—	—	—
Leisure and Hospitality	**184.61**	**179.51**	**184.70**	**2.8**	**0.0**	—	—	—	—	—	—
Arts, Entertainment, and Recreation	34.17	31.64	34.28	8.0	-0.3	—	—	—	—	—	—
Accommodation and Food Services	150.44	147.87	150.42	1.7	0.0	299.53	298.83	20.7	21.0	14.47	14.23
Food Services and Drinking Places	137.92	135.43	136.22	1.8	1.2	291.00	290.90	20.0	20.5	14.55	14.19
Other Services	**81.44**	**81.30**	**80.17**	**0.2**	**1.6**	—	—	—	—	—	—
Repair and Maintenance	14.76	14.77	14.73	-0.1	0.2	—	—	—	—	—	—
Religious, Grantmaking, Civic, Professional Organizations	43.26	43.34	42.41	-0.2	2.0	—	—	—	—	—	—
Government	**255.18**	**255.78**	**249.15**	**-0.2**	**2.4**						
Federal Government	21.34	21.24	21.37	0.5	-0.1						
State Government	69.13	69.19	66.14	-0.1	4.5						
State Government Education	42.49	42.62	39.80	-0.3	6.8						
Local Government	164.70	165.36	161.64	-0.4	1.9						
Local Government Education	94.25	95.93	91.62	-1.7	2.9						

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

* Totals may not add because of rounding.

** Percent change based on unrounded numbers.

Source: Department of Employment and Economic Development, Current Employment Statistics, 2018.

Employer Survey

Industry	Duluth-Superior MSA Jobs Apr 2018	Jobs Mar 2018	Jobs Apr 2017	% Chg. From Mar 2018	% Chg. From Apr 2017	Rochester MSA Jobs Apr 2018	Jobs Mar 2018	Jobs Apr 2017	% Chg. From Mar 2018	% Chg. From Apr 2017
TOTAL NONFARM WAGE AND SALARY	**137,253**	**136,569**	**136,646**	**0.5%**	**0.4%**	**118,123**	**117,933**	**118,827**	**0.2%**	**-0.6%**
GOODS-PRODUCING	**16,187**	**15,936**	**15,687**	**1.6**	**3.2**	**14,579**	**14,124**	**14,634**	**3.2**	**-0.4**
Mining, Logging, and Construction	8,633	8,354	8,371	3.3	3.1	4,161	3,803	4,377	9.4	-4.9
Manufacturing	7,554	7,582	7,316	-0.4	3.3	10,418	10,321	10,257	0.9	1.6
SERVICE-PROVIDING	**121,066**	**120,633**	**120,959**	**0.4**	**0.1**	**103,544**	**103,809**	**104,193**	**-0.3**	**-0.6**
Trade, Transportation, and Utilities	24,518	24,523	24,735	0.0	-0.9	17,672	17,641	17,667	0.2	0.0
Wholesale Trade	3,199	3,202	3,233	-0.1	-1.1	2,675	2,634	2,650	1.6	0.9
Retail Trade	15,277	15,257	15,262	0.1	0.1	12,062	12,134	12,271	-0.6	-1.7
Transportation, Warehouse, Utilities	6,042	6,064	6,240	-0.4	-3.2	2,935	2,873	2,746	2.2	6.9
Information	1,312	1,315	1,388	-0.2	-5.5	1,883	1,864	1,876	1.0	0.4
Financial Activities	5,889	5,898	5,776	-0.2	2.0	2,765	2,761	2,757	0.1	0.3
Professional and Business Services	8,008	7,829	8,253	2.3	-3.0	5,336	5,248	5,471	1.7	-2.5
Educational and Health Services	32,571	32,859	32,546	-0.9	0.1	47,668	48,222	49,059	-1.1	-2.8
Leisure and Hospitality	13,977	13,463	14,000	3.8	-0.2	10,964	10,709	10,390	2.4	5.5
Other Services	6,587	6,570	6,634	0.3	-0.7	4,012	4,001	4,013	0.3	0.0
Government	28,204	28,176	27,627	0.1	2.1	13,244	13,363	12,960	-0.9	2.2

Employer Survey

Industry	St. Cloud MSA Jobs Apr 2018	Jobs Mar 2018	Jobs Apr 2017	% Chg. From Mar 2018	% Chg. From Apr 2017	Mankato MSA Jobs Apr 2018	Jobs Mar 2018	Jobs Apr 2017	% Chg. From Mar 2018	% Chg. From Apr 2017
TOTAL NONFARM WAGE AND SALARY	**110,602**	**109,518**	**110,140**	**1.0%**	**0.4%**	**58,813**	**58,550**	**57,912**	**0.4**	**1.6%**
GOODS-PRODUCING	**21,927**	**21,504**	**21,457**	**2.0**	**2.2**	**10,253**	**10,037**	**10,029**	**2.2**	**2.2**
Mining, Logging, and Construction	6,248	5,830	6,354	7.2	-1.7	--	--	--	--	--
Manufacturing	15,679	15,674	15,103	0.0	3.8	--	--	--	--	--
						--	--	--	--	--
SERVICE-PROVIDING	**88,675**	**88,014**	**88,683**	**0.8**	**0.0**	**48,560**	**48,513**	**47,883**	**0.1**	**1.4**
Trade, Transportation, and Utilities	22,014	21,811	22,280	0.9	-1.2	--	--	--	--	--
Wholesale Trade	4,773	4,695	4,635	1.7	3.0	--	--	--	--	--
Retail Trade	13,100	13,059	13,670	0.3	-4.2	--	--	--	--	--
Transportation, Warehouse, Utilities	4,141	4,057	3,975	2.1	4.2	--	--	--	--	--
Information	1,515	1,512	1,573	0.2	-3.7	--	--	--	--	--
Financial Activities	5,306	5,284	5,367	0.4	-1.1	--	--	--	--	--
Professional and Business Services	8,921	8,649	8,769	3.1	1.7	--	--	--	--	--
Educational and Health Services	22,726	22,649	22,007	0.3	3.3	--	--	--	--	--
Leisure and Hospitality	8,388	8,499	9,269	-1.3	-9.5	--	--	--	--	--
Other Services	3,963	3,905	3,870	1.5	2.4	--	--	--	--	--
Government	15,842	15,705	15,548	0.9	1.9	9,766	9,798	9,745	-0.3	0.2

Employer Survey

Industry	Fargo-Moorhead MSA Jobs Apr 2018	Jobs Mar 2018	Jobs Apr 2017	% Chg. From Mar 2018	% Chg. From Apr 2017	Grand Forks-East Grand Forks MSA Jobs Apr 2018	Jobs Mar 2018	Jobs Apr 2017	% Chg. From Mar 2018	% Chg. From Apr 2017
TOTAL NONFARM WAGE AND SALARY	**140,908**	**140,123**	**141,808**	**0.6%**	**-0.6%**	**41,869**	**41,590**	**41,883**	**0.7%**	**0.0%**
GOODS-PRODUCING	**18,075**	**17,453**	**18,076**	**3.6**	**0.0**	**7,184**	**6,927**	**6,942**	**3.7**	**3.5**
Mining, Logging, and Construction	8,295	7,690	8,520	7.9	-2.6	2,645	2,453	2,682	7.8	-1.4
Manufacturing	9,780	9,763	9,556	0.2	2.3	4,539	4,474	4,260	1.5	6.6
SERVICE-PROVIDING	**122,833**	**122,670**	**123,732**	**0.1**	**-0.7**	**49,074**	**49,153**	**49,683**	**-0.2**	**-1.2**
Trade, Transportation, and Utilities	29,982	29,912	30,351	0.2	-1.2	11,633	11,483	11,666	1.3	-0.3
Wholesale Trade	8,990	8,901	9,082	1.0	-1.0	1,801	1,781	1,863	1.1	-3.3
Retail Trade	15,294	15,337	15,678	-0.3	-2.5	7,579	7,424	7,576	2.1	0.0
Transportation, Warehouse, Utilities	5,698	5,674	5,591	0.4	1.9	2,253	2,278	2,227	-1.1	1.2
Information	3,068	3,081	3,177	-0.4	-3.4	555	562	575	-1.3	-3.5
Financial Activities	11,357	11,300	11,137	0.5	2.0	1,911	1,923	1,879	-0.6	1.7
Professional and Business Services	15,021	15,090	15,702	-0.5	-4.3	3,297	3,348	3,078	-1.5	7.1
Educational and Health Services	24,945	24,769	24,248	0.7	2.9	9,879	9,870	9,683	0.1	2.0
Leisure and Hospitality	13,212	13,334	13,987	-0.9	-5.5	5,394	5,496	6,044	-1.9	-10.8
Other Services	5,580	5,554	5,469	0.5	2.0	2,016	1,981	2,016	1.8	0.0
Government	19,668	19,630	19,661	0.2	0.0	14,389	14,490	14,742	-0.7	-2.4

Source: Department of Employment and Economic Development, Current Employment Statistics, and North Dakota Job Service, 2018.

Minnesota Economic Indicators

Highlights

The **Minnesota Index** advanced for the 20th straight month in April, but the pace of growth slowed to 0.1 percent. That is the lowest monthly gain since August 2016. The U.S. index jumped 0.3 percent in April. Declining wage and salary employment along with waning average weekly manufacturing hours slowed the Minnesota Index. Minnesota's index was up 3.1 percent over the year, beating the 2.8 percent annual increase for the national index.

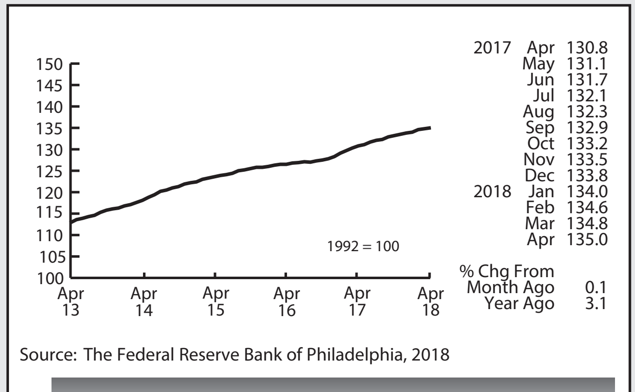
Minnesota's adjusted **Wage and Salary Employment** slipped in April with 3,200 jobs lost. Job growth has been weak so far this year with 1,900 jobs created since last December compared to 18,400 jobs created over the same period in 2017. Winter-like weather in April may have delayed some of the usual spring hiring uptick. All of the job loss was in the private sector which cut 3,400 jobs while government jobs increased by 200. Job cutbacks were highest in Leisure and Hospitality and Trade, Transportation, and Utilities. Hiring was strong in Other Services and Financial Activities. Manufacturing payroll numbers were up for the fourth consecutive month.

Minnesota's unadjusted over-the-year job growth inched down to 0.4 percent, the lowest annual rate since August 2010. The U.S. over-the-year rate stayed at 1.7 percent for the second month in a row. The 0.4 percent unadjusted over-the-year job growth rate is usually seen going into or out of a recession. This time around though the low rate may just be a product of a tightening job market. Other nearby states with as low or lower unemployment rates are also experiencing low over-the-year job growth.

Online Help-Wanted Ads zigzagged down to 134,300 in April. The decline was a 0.6 drop compared to the 1.4 percent drop nationwide. Minnesota's share of U.S. online job postings remains at 2.8 percent which continues to be higher than the state's 2.0 percent share of wage and salary employment. The state's unemployed workers to online-help-wanted ads ratio in April was 0.73, the third lowest state ratio and almost half as low as the 1.37 national ratio.

Minnesota's **Purchasing Managers' Index (PMI)** jumped for the third straight month to 63.6 in April. That is the highest reading since last July and another indicator that Minnesota's economy remains solid even though job growth has slowed. The comparable national index moderated for the second consecutive month in April, falling to 57.3. The Mid-America Business Conditions Index, where Minnesota's PMI comes from, rose to 64.5 in April. Minnesota is one of nine states included in the Mid-America index.

Adjusted average weekly **Manufacturing Hours** inched down in April to 40.7. Weekly factory hours nationally averaged 42.4 hours in April. Since the industrial classification system was revised in 2001, Minnesota and U.S. weekly manufacturing hours have averaged 40.6 and 41.1 hours respectively. Average weekly **Manufacturing Earnings**, adjusted for inflation, dipped slightly in April to $872.28. Real manufacturing paychecks, unadjusted for seasonality, were up 3.9 percent from a year ago. Real manufacturing earnings have been higher than a year ago since November 2016.



Minnesota Index

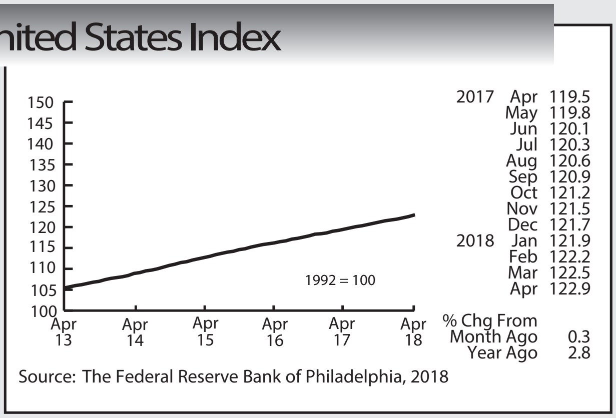
The **Minnesota Leading Index** slipped in April for the second straight month, declining to 1.1. The index has been headed in a downward direction for about a year now as the tightening labor market slows business expansion and economic growth. The 1.1 reading, however, points to further expansion of the state's economy over the next six months.

Adjusted **Residential Building Permits**, after getting off to a strong start in January, have dipped since falling for the third consecutive month in April to 1,870, the lowest level since last July. Home-building permits through the first four months of 2018 were down 12.6 percent from the same period a year ago. Annual home-building permits were up 15 percent in 2015 and 10 percent in 2016 but only 2 percent in 2017.

Adjusted **Initial Claims for Unemployment Benefits (UB)** climbed in April for the second month in a row and for the fifth time over the last six months. April's 17,519 initial claims were just a tad higher than in March but the level of initial claims, after having decreased since 2010, have started to inch up over the last six months. Initial claim numbers, however, remain substantially below historical norms, suggesting that employers have continued to keep layoffs low in light of the tight job market.

by Dave Senf

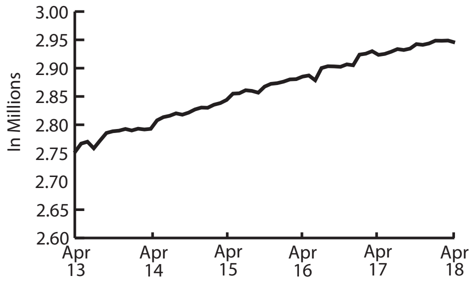
United States Index



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

Minnesota Economic Indicators

Wage and Salary Employment



seasonally adjusted

2017	Nov	2.9412
	Dec	2.9437
2018	Jan	2.9486
	Feb	2.9484
	Mar	2.9488
	Apr	2.9456

% Chg From Month Ago -0.1

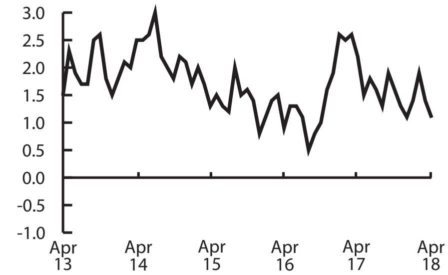
unadjusted

2017	Apr	2,913.1
2018	Apr	2,924.7

% Chg From Year Ago 0.4

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2018

Minnesota Leading Index

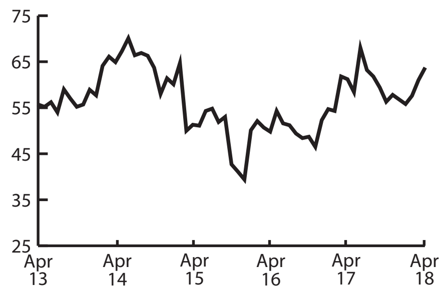


2017	Apr	2.2
	May	1.5
	Jun	1.8
	Jul	1.6
	Aug	1.3
	Sep	1.9
	Oct	1.6
	Nov	1.3
	Dec	1.1
2018	Jan	1.4
	Feb	1.9
	Mar	1.4
	Apr	1.1

% Chg From Month Ago -21.4
Year Ago -50.0

Source: The Federal Reserve Bank of Philadelphia, 2018

Purchasing Managers' Index

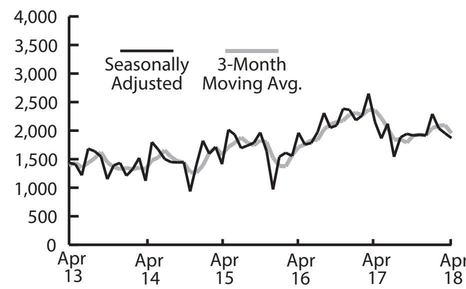


2017	Apr	61.2
	May	58.4
	Jun	68.0
	Jul	63.2
	Aug	61.8
	Sep	59.4
	Oct	56.3
	Nov	57.8
	Dec	56.8
2018	Jan	55.8
	Feb	57.6
	Mar	61.0
	Apr	63.6

% Chg From Month Ago 4.3
Year Ago 3.9

Source: Creighton University, Mid-America Survey of Business Conditions, 2018

Residential Building Permits



seasonally adjusted

2017	Nov	1,928
	Dec	1,916
2018	Jan	2,293
	Feb	2,043
	Mar	1,953
	Apr	1,870

% Chg From Month Ago -4.2

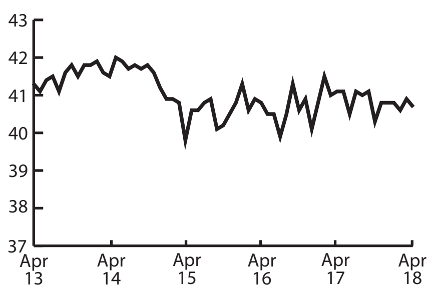
unadjusted

2017	Apr	1,973
2018	Apr	1,860

% Chg From Year Ago -5.7%

Source: Residential Building Permits, Census Bureau, U.S. Department of Commerce, 2018

Average Weekly Manufacturing Hours



seasonally adjusted

2017	Nov	40.8
	Dec	40.8
2018	Jan	40.8
	Feb	40.6
	Mar	40.9
	Apr	40.7

% Chg From Month Ago -0.4

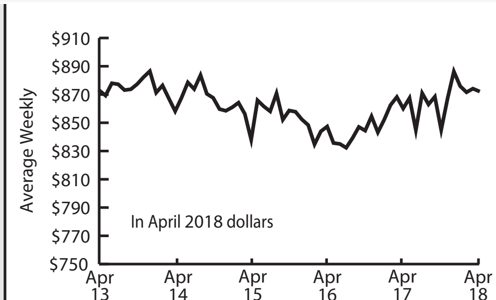
unadjusted

2017	Apr	41.1
2018	Apr	40.9

% Chg From Year Ago -0.5%

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2018

Manufacturing Earnings



seasonally adjusted

2017	Nov	867.04
	Dec	886.29
2018	Jan	875.91
	Feb	871.59
	Mar	874.14
	Apr	872.28

% Chg From Month Ago -0.2

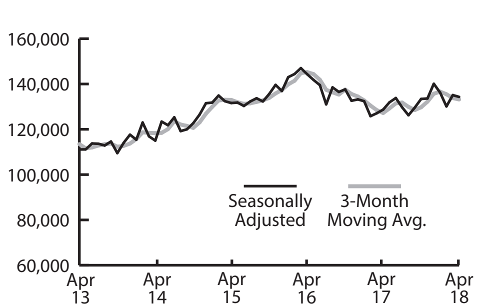
unadjusted

2017	Apr	839.67
2018	Apr	872.81

% Chg From Year Ago 3.9%

Source: Department of Employment and Economic Development, Current Employment Statistics Program, 2018

Online Help-Wanted Advertising

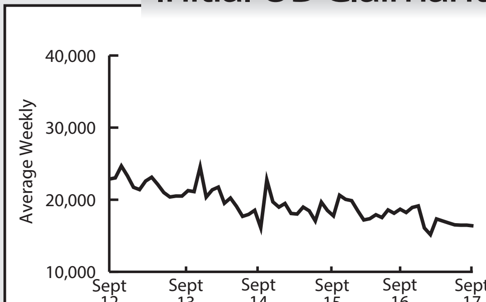


2017	Apr	128,700
	May	131,900
	Jun	133,800
	Jul	129,700
	Aug	126,200
	Sep	129,600
	Oct	133,400
	Nov	133,600
	Dec	140,100
2018	Jan	136,200
	Feb	130,100
	Mar	135,100
	Apr	134,300

% Chg From Month Ago -0.6
Year Ago 4.4

Source: The Conference Board Inc., 2018

Initial UB Claimants



seasonally adjusted

2017	Nov	16,753
	Dec	17,040
2018	Jan	17,651
	Feb	17,203
	Mar	17,515
	Apr	17,579

% Chg From Month Ago 0.4

unadjusted

2017	Apr	12,516
2018	Apr	14,416

% Chg From Year Ago 15.2%

Source: Department of Employment and Economic Development, Unemployment Insurance Program, 2018

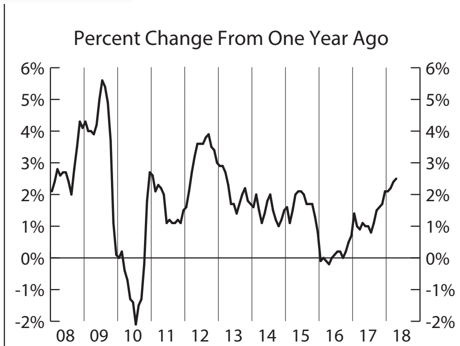
Minnesota Employment Review

DEED
Labor Market Information Office
1st National Bank Building
332 Minnesota Street, Suite E200
St. Paul, MN 55101-1351
651.259.7400 (voice)
1.888.234.1114 (toll free)
651.296.3900 (TTY)
1.800.657.3973 (TTY toll free)
e-mail :
DEED.lmi@state.mn.us
Internet :
mn.gov/deed/lmi

Labor Market Information Help Line:
651.259.7384

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

The Consumer Price Index for All Urban Consumers (CPI-U) increased 0.2 percent in April on a seasonally adjusted basis after falling 0.1 percent in March the U.S. Bureau of Labor Statistics reported today. The indices for gasoline and shelter were the largest factors in the seasonally adjusted increase in the all items index, although the food index increased as well. The indices for household furnishings and operations, personal care, tobacco, medical care, and apparel all increased in April, while those for used cars and trucks, new vehicles, recreation, and airline fares all declined.



The all items index rose 2.5 percent for the 12 months ending April; this figure has been mostly trending upward since it was 1.6 percent for the period ending June 2017.

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

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

The Last Word

All states are required under the federal Workforce Innovation and Opportunity Act (WIOA) to maintain a list of educational institutions, programs, and courses: the Eligible Training Providers List (ETPL). The list ensures that Minnesotans and customers in WIOA programs (i.e., Adult, Dislocated Worker, or Youth) can find quality training programs that provide credentials upon completion, credentials that can lead to successful careers. DEED maintains the ETPL, which is available through the interactive Career and Education Explorer tool at **mn.gov/deed/careers**.

Minnesota Job Outlook for First Quarter 2018 to First Quarter 2019

U.S. Economic Outlook

U.S. job growth over the first four months of 2018 has matched the first four months of 2017, averaging 1.6 percent on a year-over-year basis. That rate is on par with last year's annual average 1.5 percent job growth which was down slightly from the 1.7 percent in 2016. Nonfarm payroll numbers have expanded by an average of 1.7 percent since 2011, peaking in 2015 with 2.1 percent growth (see Figure 1). U.S. job growth is expected by most forecasts to inch up to 1.7 or 1.8 percent in 2018 as the U.S. economy is expected to remain solid over the next 12 months.

The current expansion is now the second-longest on record, having passed the 1962-69 expansion in May. If growth continues through July 2019 this expansion will replace the 1991-2001 expansion to become the longest on record. This expansion has been steady but unspectacular with GDP growth subpar compared to past expansion levels. Real GDP growth picked up in 2017 to 2.3 percent from 1.5 percent in 2016 and is expected to climb to 2.7 or 2.8 percent this year with the tailwinds from fiscal stimulus – the tax cut and increased federal spending – and stronger economic growth across most of the world.

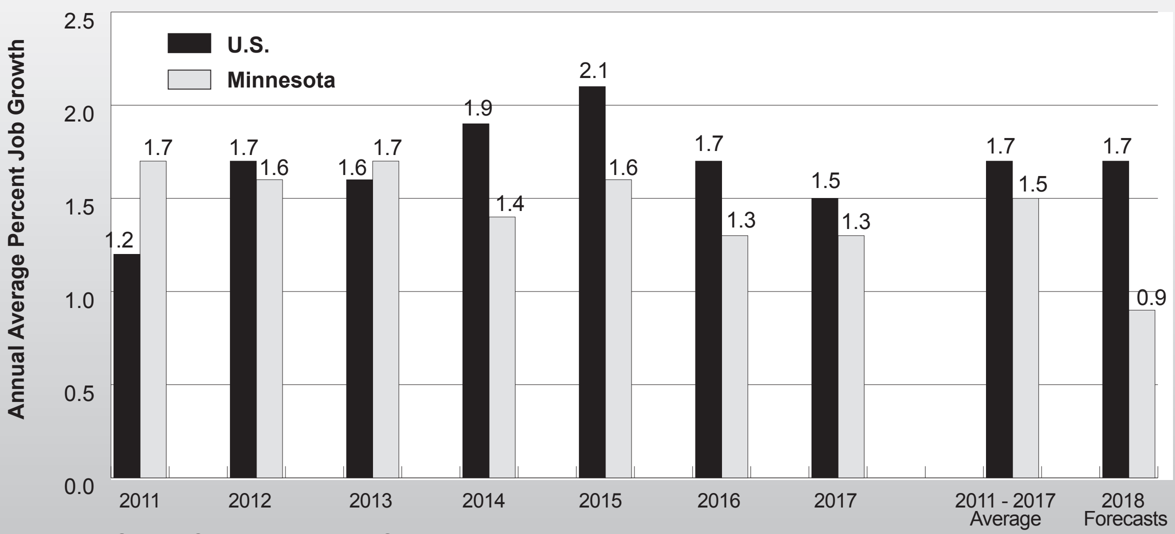
The key question is if there is enough slack in the labor market to support an acceleration in GDP growth. GDP growth arises from productivity gains and/or increases in employment. The U.S. unemployment rate dipped to 3.9 percent in April, the lowest level since late 2000. Other indicators are also pointing to a rapidly tightening labor market. A broader measure of unemployment, U6, that includes workers who say they want a job but didn't look for one last month dipped to 7.8 percent in April, its lowest level in 17 years.

And for the first time in the 20-year history of job openings data the number of unemployed workers virtually equaled the total of unfilled jobs in March. At the peak of the recession there were nearly seven unemployed workers for every job opening, now there is one unemployed worker for each job vacancy. Initial claims for unemployment, usually consider a reliable indicator of the layoff rate, are running at levels not seen in 40 years and are another indicator of a labor market that is tightening as employers are less likely to let workers go if they think they will have a hard time hiring new workers.

There are a few signs that the labor market may still have some slack left that will allow economic growth to accelerate this year and boost job growth. Labor force participation rates, which plunged during the recession, have nudged up over the last year but remain well below pre-recession level. There is an ongoing debated on how much of the labor force participation decline since 2008 is caused by retiring baby boomers versus workers remaining out of the labor force for a variety of other reasons. If the tightening labor market can draw some of the sidelined workers back into the labor force, then job growth may be boosted a notch or so.

The subpar real increase in wages during this recovery may explain at least some of why working-age population labor force participation is still 2 percentage points below 2008

Figure 1. Annual Average Job Growth in Minnesota and U.S., 2011-2017



Source: Current Employment Statistics

levels. A skills gap between what employers want and what sidelined workers have is another reasons offered as to why labor force participation rates have not bounced back more quickly. As the labor market remains strong, wage growth may start to pick up and the skills gap may lessen as employers moderate their skill demands and out-of-the-labor-force workers improve their skills. Both developments would boost labor force numbers and keep national job growth in the 1.7 to 1.8 percent range at least through the next year.

Minnesota Job Outlook

Job growth in Minnesota during the first four months of 2018 has gotten off to a slow start, averaging just 0.7 percent on a year-over-year basis. That in nearly half the rate of the 1.3 percent annual average experienced in both 2016 and 2017 and less than half the national rate. Job growth has been tailing off since the middle of last year as job growth, after averaging 1.6 percent over the first half of last year, slipped to 1.1 during the second half. Minnesota job growth has topped U.S. job growth in 37 of the last 67 years (consistent job numbers are available back to 1950) but in only eight of the last 18 years. Job growth in the state has lagged behind national growth for the last four years. Between 2014 and 2017 employment in Minnesota increased 4.3 percent compared to 5.4 percent nationwide.

Minnesota's lagging job growth is most likely related to labor supply problems rather than labor demand problems. Most labor market measures support the notion that Minnesota's labor market is much tighter than in most states and is limiting job growth in Minnesota relative to the pace of U.S. job growth. The first indicator is Minnesota's low 3.2 unemployment rate compared to the 3.9 U.S. unemployment rate in April.

When the Great Recession started in December 2007, Minnesota's unemployment rate was 4.7 percent while the U.S. rate was 5.0. Minnesota's rate peaked at 8.0 percent in the middle of 2009 and dropped below 4.7 percent in early 2014. The U.S. rate peaked at 10.0 percent in late 2009 and did not drop below 5.0 percent until early 2016. Minnesota's pool of unemployed workers resulting from the recession was smaller and was reduced faster compared to the national unemployment picture. Minnesota's unemployment rate has been 4.0 percent or lower since the middle of 2014 while the U.S. rate just fell below the 4.0 percent mark in April. U.S. employers are just starting to deal with trying to fill job vacancies with unemployment below 4 percent. Minnesota employers have been struggling with the same problem since 2014.

Another measure of unemployment, the U-6 unemployment rate, also points to Minnesota's labor market being tighter than the U.S. market. The U-6 is the broadest measure of unemployed including discouraged workers who have quit looking for a job and part-time workers who want to work full-time. The U-6 rate provides a wider measure of the pool of the individuals that are potentially available to fill job openings. Minnesota's U-6 rate stood at 6.1 percent in April compared to 7.8 nationally. Minnesota's pool of possible hires as indicated by the lower U-6 rate is significantly smaller than nationwide.

Minnesota's low unemployment rate over the last few years isn't, however, unique to Minnesota. The state's 3.2 percent unemployment rate in April was the thirteen lowest state rate. Nearby states with unemployment rates at 3.2 percent or lower have also experienced slow growth so far in 2018. The average over-the-year job growth in those states during the first four months of 2018 were 0.7 percent in Indiana, 0.7 percent in Iowa, 0.5 percent in Nebraska, -1.3 percent in North Dakota, and 0.9 percent in Wisconsin. The pool of unemployed workers willing to take a job in these states has dried up just as in Minnesota.

Minnesota's labor force growth over the last year (from April 2017 to April 2018) has, surprisingly, been higher than U.S. labor force growth, 1.4 percent to 0.8 percent. The state's labor force growth, rather than showing declining unemployed workers, has supported recent job growth and kept the unemployment rate from falling faster. The higher than expected labor force growth has in part been fueled by individuals coming back into the labor force. Both labor force participation and the employment-to-population ratio

Table 1. Minnesota and U.S. Labor Force Measures

	Minnesota	U.S.	Source
U-3 Unemployment Rate (Seasonally Adjusted April 2018)	3.2	3.9	*Local Area Unemployment Statistics*
U-6 Unemployment Rate (Seasonally Adjusted April 2018)	6.1	7.4	*Local Area Unemployment Statistics*
Labor Force Growth (Seasonally Adjusted April 2017 - April 2018)	1.4	0.8	*Local Area Unemployment Statistics*
Labor Force Partipcation (Seasonally Adjusted April 2017 - April 2018)	70.2 -70.5	62.9 - 62.8	*Local Area Unemployment Statistics*
Employment-to-Population Ratio (Seasonally Adjusted April 2017 - April 2018)	67.7 - 68.2	60.2 - 60.3	*Local Area Unemployment Statistics*
Conference Board's Supply/Demand Ratio (Seasonally Adjusted April 2018)	0.7	1.4	*Conference Board Online Help-Wanted Ads*

have climbed in Minnesota over the last year while remaining flat nationwide.

Increasing labor force participation rates and employment-to-population ratios are usually associated with tightening labor markets when all other factors are constant. Minnesota's labor force participation rate and employment-to-population ratio are already significantly above the U.S., suggesting that the state's future labor force growth will be limited as the labor force participation rate and employment-to-population ratio may be rapidly approaching their upper limits in Minnesota.

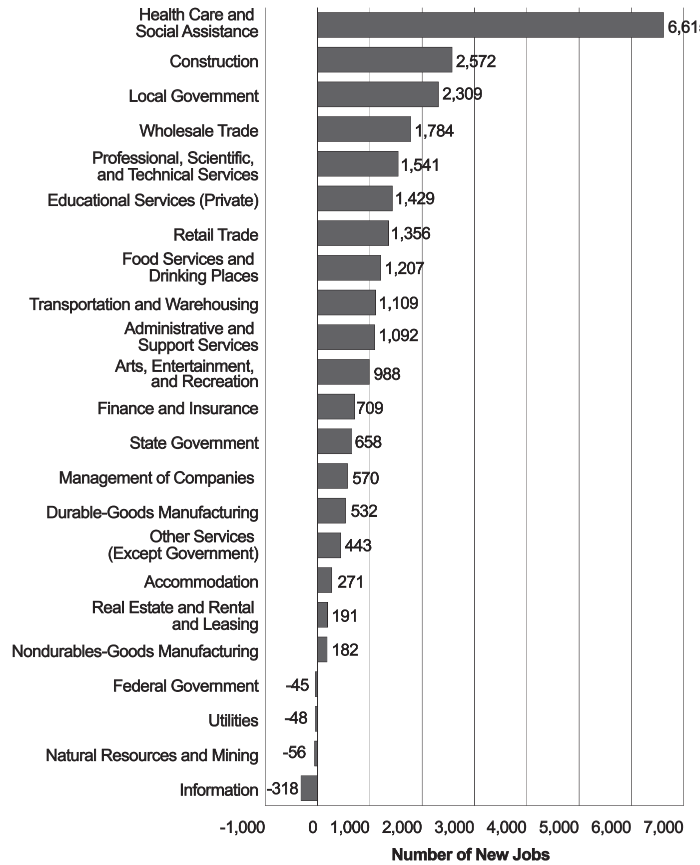
Another indicator of just how tight Minnesota's labor market has become is the state's Labor Supply/Labor Demand ratio published by the Conference Board, Inc. The Conference Board uses the monthly number of unemployed workers for labor supply and monthly online help-wanted ads for labor demand. Minnesota's ratio in April was the fourth lowest at 0.7. In other words, there are more online help-wanted ads in Minnesota than there are unemployed workers. Only North Dakota, Hawaii, and Colorado had lower ratios. Twelve states had a ratio below one while nationally the ratio was 1.4 in April. Nationally there were still more unemployed workers than online help-wanted ad.

Industry Outlook

Minnesota's expected gain of 25,000 jobs between the 1st quarter of 2018 and the 1st quarter of 2019 will be slightly higher than the 22,700 jobs added over the 1st quarter 2017 to 1st quarter 2018 period. Job growth in percentage terms is predicted to be 0.9 percent over the next 12 months compared to 0.8 percent over the previous 12 months. The health care and social assistance sector is once again expected to add the most jobs. All but four of the 23 sectors will add jobs but jobs growth will be below 1.0 percent in 15 sectors. Slight job decline is anticipated in federal government, Utilities, Information, and Natural Resources and Mining. The expanding sectors will add around 25,500 new positions but job cutbacks in the four sectors expected to experience declining workforces will bring net job growth down to 25,000.

Half of the sectors are expected to add more jobs than last year with Food Services and Drinking Places having the largest positive turnaround from 2017. Other sectors expected to have increased hiring in 2018 relative to 2017 are Management of Companies, Finance and Insurance, and Professional, Scientific, and Technical Services. Forecasts for job growth across 23 Minnesota sectors between the 1st quarter of 2018 and 1st quarter of 2019 are displayed in Figure 2.

Figure 2. Minnesota's Industry Employment Forecast 1st Quarter 2018 to 1st Quarter 2019



Source: Minnesota Department of Employment and Economic Development

Natural Resources and Mining (excluding Agriculture)

After adding over 600 jobs two years ago, Natural Resources and Mining employment slipped slightly last year. Small job loss is expected again in 2018 as taconite mining is expected to remain flat as world steel demand remains restrained. Several new mines may eventually open in the Iron Range but the anticipated job boost is still a number of years into the future. Employment in this sector has average 6,800 since 2012 but is expected to be remain below that average in 2018.

Construction

Construction jobs increased by 4,500 in 2016 and 3,000 in 2017. The downward trend in Construction job growth is expected to continue into 2018 with 2,600 jobs expected to be added this year. This sector continues a slow and uneven recovery from the 2005 – 2006 home-building bust. Construction job gains this year will push Construction employment to the highest level since 2007 but still 5 percent below the peak levels of 2004 – 2006.

Durable Goods Manufacturing

Payroll numbers at Minnesota's Durable Goods Manufacturers slipped two years ago but rose slightly last year. The slight upswing is expected to continue in 2018, but job growth will be around only 0.3 percent. Job loss in the state's Computer and Electronic Product and Transportation Equipment Manufacturing sectors will offset expanded payrolls numbers in other durable manufacturing industries. Minnesota employment growth in this sector is likely to trail U.S. growth for the second year in a row.

NOTES

The Minnesota Department of Employment and Economic Development (DEED) produces two sets of employment projections or forecasts. One set, long-term employment projections, looks 10 years into the future and is aimed at young adults planning a career or older workers considering a career change.

Other jobseekers, such as dislocated workers or labor force re-entrants, need information on what the job market will look like next month or nine months down the road. Short-term forecasts strive to fill that need. This report provides a forecast for the state's job market from the 1st quarter of 2018 to the 1st quarter of 2019. Short-term forecasts are updated each quarter to account for recent economic developments. These short-term job forecasts, combined with DEED's Job Vacancy Survey and Occupations in Demand (OID), help jobseekers identify occupations that are currently in demand as well as occupations that will be in demand over the next year.

Short-term forecasts of industry-based employment are based on monthly Current Employment Statistics (CES) employment data from January 1990 through March 2018. CES employment data cover only wage and salary employment or about 92 percent of total jobs in Minnesota. Estimates and forecasts of agricultural jobs, self-employed farmers, self-employed nonagricultural workers, and domestic workers employed by households are not included.

Employment forecasts are carried out for 70 industries, mostly at the 2-digit North American Industry Classification System (NAICS) level, using five alternative statistical methodologies. National and Minnesota leading indicators are incorporated in the models. Projected industrial employment is converted to occupational employment forecasts using occupational staffing data from the Occupational Employment Statistics (OES) survey.

Job opening forecasts for occupations are the sum of job openings arising from employment growth, from workers exiting the labor force entirely, and from workers transferring occupations. Job openings from employment growth, the 25,000 jobs forecasted to be added over the next year, will be the smallest source of job openings over the next year, accounting for roughly 7 percent of openings.

Workers retiring or leaving the labor force for other reasons will account for 134,000 job openings or about 40 percent of total openings. Job openings from workers transferring occupations will total 178,000 over the year or 53 percent of all job openings. Job openings related to a worker switching employer but staying in the same occupation are excluded from the 339,000 job openings forecasted to occur over the next 12 months. Exit and transfer jjob opening estimates are based on national rates of job separation developed the Bureau of Labor Statistics using Current Population Survey (CPS) data.

Nondurable Goods Manufacturing

Nondurable goods manufacturing employment will expand for the third straight year in 2018, but the gain will be slower than in recent years. Job growth this year will be 0.3 percent down from last year's 1.0 percent growth as Food Manufacturing hiring is expected to cool.

Wholesale Trade

Wholesale trade payrolls climbed by 1.7 percent last year and are expected to continuing to increase this year, jumping 1.3 percent. Just like last year a majority of the hiring is expected to occur at durable goods wholesaler firms.

Retail Trade

Retail trade employment increased by 1,500 jobs last year and is predicted to add an additional 1,400 jobs this year. Employment gains at Building Material and Garden Equipment stores and at Food and Beverage Stores will offset job losses in General Department Stores.

Utilities

Minnesota's utilities have been gradually reducing their workforces over the last five years, and a slight decrease this year will extend that streak to six straight years. Minnesota utilities are expected to trim employment by 0.4 percent in 2018 after a 0.3 percent decrease last year. Utilities have cut their workforces by an average of 0.9 percent since 2014.

Transportation and Warehousing

After adding 5,700 jobs in 2016, this sector added 1,300 jobs last year. A large share of the job gains two years ago was in Warehousing. About 1,100 jobs are expected to be created in this sector this year with the hiring expected to be spread across the Truck Transportation, Couriers and Messengers, and Warehousing industries. Transportation and Warehousing employment has been strong since 2010, leading to employment in this sector being roughly 14 percent higher now than in 2007 before the recession hit and employment dropped for three consecutive years.

Information

The information sector has been losing jobs since 2002 and will continue to shed jobs in 2018. Job loss this year is anticipated to slip another 300 jobs which is smaller than the 800 cutbacks two years ago. Minnesota Publishing firms have cut payroll numbers by 8,000 since 2002 while Telecommunication employment has shrunk by 4,000 jobs.

Finance and Insurance

Employment in Minnesota's Finance and Insurance sector dropped by 1,000 jobs last year but is expected to add 700 jobs this year. Job growth in the sector has averaged 1.5 percent annually since 2011 but is expected to add jobs at a 0.5 percent clip in 2018. More jobs have been added in the Insurance industry than in the Credit Intermediation and Related Activities industry since 2011 in Minnesota.

Real Estate and Rental and Leasing

Real Estate and Rental and Leasing employment was down slightly last year, slipping 0.4 percent, but is expected to rebound slightly in 2018 with job growth predicted to be 0.6 percent. Job growth in this sector in Minnesota has lagged behind national job growth in four of the last five years.

Professional, Scientific, and Technical Services

Employment in Professional, Scientific, and Technical Services companies was basically flat last year after having grown by 4,200 positions in 2017. Hiring is expected to pick up in 2018 with 1,500 new hires anticipated. Job growth in this sector has been slightly stronger in Minnesota than nationally with employment in Minnesota up 22 percent since 2011 versus 20 percent nationwide.

Management of Companies

This sector is composed of employment at corporate, subsidiary, and regional headquarters offices and holding companies. Employment decline by 0.8 percent (600 jobs) last year but is predicted to increase by 0.7 percent (570 jobs) this year. The sector saw strong job growth over the 2011 – 2014 period but has seen job cutbacks since. This sector's workforce is down about 1.5 percent or 1,200 positions since 2015.

Administration, Support, Waste Management, and Remediation Services

Employment in the Administration and Support sector, which plunged during the Great Recession, has regained all employment lost in 2008 and 2009 and then some and is now 5 percent higher than in 2007. Employment Services employment has declined over the last few years while Services to Buildings Employment has expanded. Last year the sector lost 630 jobs but is expected to add 570 over the next 12 months.

Educational Services

Private Educational Services payrolls have increased every years since 2015 despite payroll reductions at private colleges, universities, and professional schools. Increasing employment at private elementary and secondary schools has fueled a large share of the job growth. Employment was up by 980 last year and is expected to increase by 1,100 this year.

Health Care and Social Assistance

Employment growth in the huge Health Care and Social Assistance sector slowed last year but still added 5,800 jobs in 2017. Job growth in this sector is expected to inch up from 1.2 percent last year to1.4 percent this year, adding roughly 6,600 new positions.

Arts, Entertainment, and Recreation

Employment in Arts, Entertainment, and Recreation, after increasing by an average of 2.5 percent per year between 2011 and 2015, accelerated in 2016 (6.5 percent) and in 2017 (6.0 percent). The pace of job growth is anticipated to wane in 2018 to 2.4 percent, adding about 1,000 jobs.

Accommodation

Accommodation jobs grew by less than 1 percent annually between 2011 and 2016 but jumped to 4.7 percent in 2016 before again falling below 1 percent in 2017. Job growth is predicted to be slightly higher in 2018, increasing to 1.1 percent or about 270 jobs.

Food Services and Drinking Places

Job growth was consistently around or above 2 percent between 2011 and 2016 before slowing to 1.7 percent in 2017. Job growth in the sector turned negative last year, falling 1.6 percent. A slight rebound is expected this year with jobs increasing 0.6 percent in 2018. The 0.6 percent growth translates into 1,200 additional jobs as this sector employed roughly 196,000 in 2017, up from 159,000 in 2000.

All Other Services

After adding 1,400 jobs in 2016, All Other Services jobs dropped by 500 in 2017. Almost all the jobs lost last year are expected to be regained in 2018 with payrolls numbers increasing by 440. Most of the job gain is expected in Personal and Laundry Services and Religious, Grantmaking, Civic, Professional, and Similar Organizations.

Government

Public sector employment, after having increased by 2,000 jobs in 2016, jumped by 7,300 positions in 2017 with half of the expansion occurring in state government and the other half in local government. Public sector job additions in 2018 are expected to be about half as large as last year with most of the 2018 expansion occurring at the local government level.

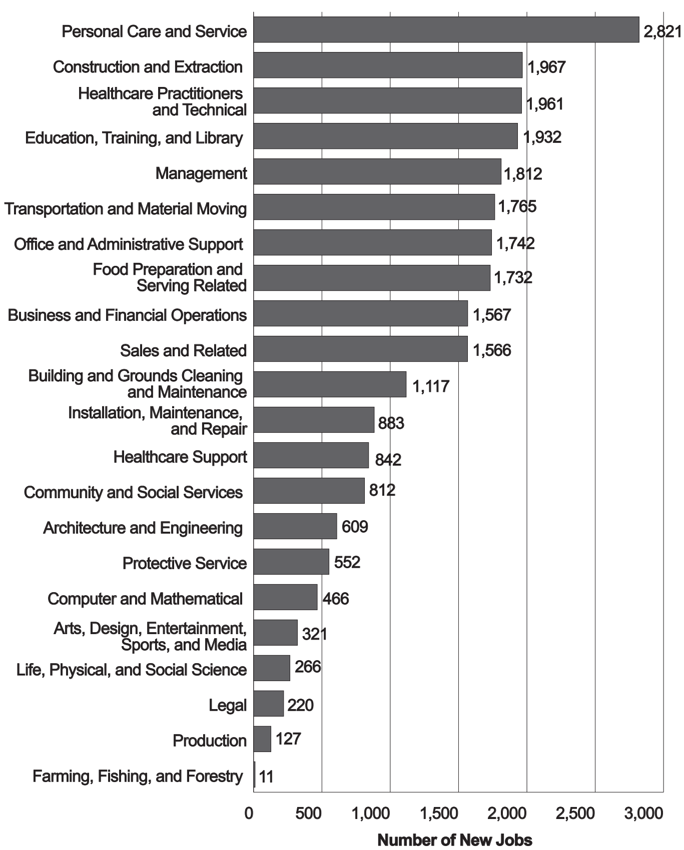
Occupational Outlook

The 25,000 new jobs forecast between the first quarters of 2018 and 2019 represent the net gain in quarterly average employment. Many more jobs will actually be created, and almost as many jobs will be eliminated. But when all the jobs created are weighed against the jobs destroyed, the state will end up with roughly 25,000 more nonfarm payroll jobs in the first quarter of 2019 compared to a year earlier.

All major occupational groups are predicted to gain jobs over the year, but job growth will be minimal, below 0.5 percent in three occupational groups: office and administrative support, production, and farming, fishing, and forestry occupations. Even though job growth will be slow in office and administrative support occupations, an additional 1,700 jobs are expected to be added in the state's largest occupational group. Construction and personal care and service occupations are expected to grow the fastest over the next 12 months. These two occupational groups will add the most jobs followed by healthcare practitioners and technical and education, training, and library occupations (see Figure 3).

Eleven of the 22 occupational groups are expected to add more than 1,000 jobs each the next 12 months (see Figure 3). Fifteen occupational groups are expected to grow faster than the 0.9 percent overall job growth. Building and grounds

Figure 3. Minnesota's Occupational Employment Forecast 1st Quarter 2018 to 1st Quarter 2019



Source: Minnesota Department of Employment and Economic Development

cleaning and maintenance occupations and community and social service occupations are predicted to grow relatively fast in 2018.

Approximately 77 percent of Minnesota's 805 occupations are expected to experience employment growth over the next 12 months, but for many occupations the increase will be small. Most of the increasing occupations, 554 of the 681 occupations predicted to increase, will see employment gains of less than 100 jobs. These occupations combined accounted for roughly 40 percent of jobs in 2018 and are predicted to account for almost the same percent of employment growth.

Just over 10 percent of occupations, 102 occupations to be precise, are expected to see little change in employment totals over the next year. These occupations are employed mostly in industries predicted to show little workforce growth in the short-term. Only 85 occupations will shrink over the next 12 months. Job losses in these occupations will add up to roughly 1,460 positions. Team assemblers, executive secretaries and administrative assistants, and electrical and electronic equipment assemblers are expected to lose the most jobs.

The fastest growing occupations will add employees at a rate two or three times faster than the 0.9 percent total employment expansion. Self-enrichment teachers, couriers and messengers, plumbers, pipefitters, personal care aides, and physician assistants are the predicted fastest growing jobs that already have employment of 500 or more in 2018 (see Table 2). The 20 fastest growing occupations combined will account for 3,300 new jobs or roughly 13 percent of forecasted job growth. The bulk of those jobs will be personal care aide positions.

Many of the occupations that are expected to add the most jobs are familiar, having made the top 20 list in past years (see Table 3). These occupations are either concentrated in industries that are expanding faster than the overall job growth like construction or health care or are large sized occupations that add workers even when job growth is moderate. Personal care aides, home health aides, and registered nurses are examples of occupations adding significant levels of new workers as a result of relatively strong health care and social assistance sector employment growth. Stock clerks and order fillers, customer service representatives, and all other business operations specialists are median to large size occupations that can be counted on to add sizable number of jobs even when overall job growth is moderate. Almost 38 percent of employment growth expected between the first quarters of 2018 and 2019 will likely be in one of the 20 occupations listed in Table 3.

Job openings related to employment growth, while an important component of the job market, account for a fairly small slice of all job openings available to jobseekers, especially as job growth slows and the number of retirements swells. Most job openings are created by employee turnover. A nurse working at a hospital job hops over to a health clinic for better hours. An engineer switches careers becoming a high school math teacher. A 20-something waitress leaves

Table 2. Top 20 Fastest Growing Occupations

	Estimated 1st Quarter 2018 Empoyment	Forecast 1st Quarter 2019 Empoyment	Forecast Percent Change	Forecast Numerical Change
Self-Enrichment Education Teachers	6,554	6,786	3.5	232
Couriers and Messengers	1,054	1,089	3.3	35
Plumbers, Pipefitters, and Steamfitters	7,932	8,189	3.2	257
Personal Care Aides	70,092	72,182	3.0	2,090
Physician Assistants	2,015	2,074	2.9	59
Construction and Related Workers, All Other	486	500	2.9	14
Structural Iron and Steel Workers	1,365	1,404	2.9	39
Tour Guides and Escorts	667	686	2.8	19
Brickmasons and Blockmasons	1,201	1,235	2.8	34
Roofers	2,018	2,074	2.8	56
Septic Tank Servicers and Sewer Pipe Cleaners	736	756	2.7	20
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	2,620	2,691	2.7	71
Crane and Tower Operators	891	915	2.7	24
Insulation Workers, Mechanical	863	886	2.7	23
Cement Masons and Concrete Finishers	4,562	4,683	2.7	121
Statisticians	924	948	2.6	24
Security and Fire Alarm Systems Installers	1,054	1,081	2.6	27
Dental Laboratory Technicians	747	766	2.5	19
Telecommunications Line Installers and Repairers	1,068	1,095	2.5	27
Coaches and Scouts	4,152	4,257	2.5	105

Table 3. Top 20 Occupations Adding the Most Jobs

		Estimated 1st Quarter 2018 Empoyment	Forecast 1st Quarter 2019 Empoyment	Forecast Percent Change	Forecast Numerical Change
1	Personal Care Aides	70,092	72,182	3.0	2,090
2	Combined Food Preparation and Serving Workers, Including Fast Food	64,403	65,148	1.2	745
3	Registered Nurses	62,261	62,902	1.0	641
4	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	45,128	45,754	1.4	626
5	Heavy and Tractor-Trailer Truck Drivers	33,637	34,110	1.4	473
6	General and Operations Managers	42,727	43,192	1.1	465
7	Home Health Aides	25,716	26,139	1.6	423
8	Laborers and Freight, Stock, and Material Movers, Hand	37,569	37,962	1.0	393
9	Teacher Assistants	34,810	35,196	1.1	386
10	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	32,401	32,767	1.1	366
11	Stock Clerks and Order Fillers	33,368	33,713	1.0	345
12	Accountants and Auditors	28,807	29,120	1.1	313
13	Light Truck or Delivery Services Drivers	15,214	15,526	2.1	312
14	Retail Salespersons	81,203	81,489	0.4	286
15	Elementary School Teachers, Except Special Education	30,854	31,129	0.9	275
16	Landscaping and Groundskeeping Workers	14,730	14,995	1.8	265
17	Financial Managers	15,281	15,542	1.7	261
18	Customer Service Representatives	57,454	57,714	0.5	260
19	Plumbers, Pipefitters, and Steamfitters	7,932	8,189	3.2	257
20	Business Operations Specialists, All Other	26,406	26,648	0.9	242

her job at a restaurant for a database administrator job after completing her computer science degree. Or a 60-year old machinist retires from his manufacturing firm after working there for 30 years.

Current Population Survey data, which track occupational changes by workers, can be used to estimate two main sources of job openings. Exit openings occur when a person holding a job leaves that job by exiting the labor force. Such exits arise when workers retire, leave a job to take care of family members, or leave a job to return to school. The other main source of openings is transfer openings which are created when workers switch occupations. Over the next 12 months roughly 178,000 transfer openings are expected, with 134,000 exit openings and the 25,000 openings created by employment growth.

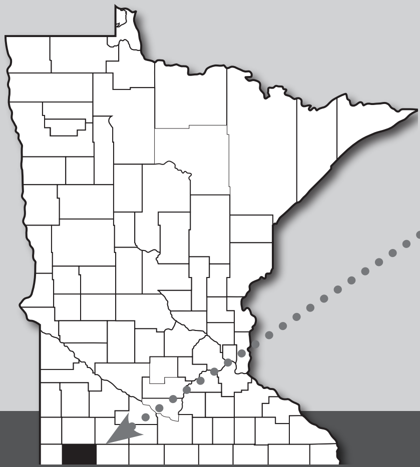
In all, an estimated 339,000 occupational openings will need to be filled over the next 12 months in Minnesota when the three types of job openings above are combined. Only a handful of occupations are expected to have no openings this year. These occupations are small in size with less than 20 positions. All other occupations will have some job openings even if the number of jobs in the occupation are decreasing since openings from exiting and transferring will be occurring.

For example, the number of workers employed as team assemblers is expected to fall to 22,300 during the first quarter of 2019 from 22,500 during the first quarter of 2018. Despite the loss of 200 team assembler position during the year, there will be an estimated 2,600 openings for team assemblers. Exit openings will create 1,000 of the openings while openings from transfers will created another 1,600 openings. Table 4 lists the Top 20 occupations when ranked by total job openings. The occupations expected to have the most total job openings over the next year tend to be occupations that already employ a large number of workers and have high turnover rates. Leading the most job openings list are combined food preparation and serving workers, cashiers, and personal care aides.

by Dave Senf

Table 4. Top Occupations with Most Total Job Openings

		Estimated 1st Quarter 2018 Empoyment	Forecast 1st Quarter 2019 Empoyment	Forecast Percent Change	Forecast Numerical Change	Forecast Total Job Openings
1	Combined Food Preparation and Serving Workers	64,403	65,148	1.2	745	12,480
2	Cashiers	63,901	64,106	0.3	205	12,079
3	Personal Care Aides	70,092	72,182	3.0	2,090	12,044
4	Retail Salespersons	81,203	81,489	0.4	286	11,892
5	Waiters and Waitresses	48,158	48,381	0.5	223	9,270
6	Customer Service Representatives	57,454	57,714	0.5	260	7,524
7	Office Clerks, General	55,514	55,692	0.3	178	6,620
8	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	45,128	45,754	1.4	626	6,443
9	Laborers and Freight, Stock, and Material Movers, Hand	37,569	37,962	1.1	393	5,493
10	Stock Clerks and Order Fillers	33,368	33,713	1.0	345	4,565
11	Heavy and Tractor-Trailer Truck Drivers	33,637	34,110	1.4	473	4,037
12	Bookkeeping, Accounting, and Auditing Clerks	34,778	34,888	0.3	110	3,941
13	General and Operations Managers	42,727	43,192	1.1	465	3,919
14	Teacher Assistants	34,810	35,196	1.1	386	3,904
15	Registered Nurses	62,261	62,902	1.0	641	3,794
16	Sales Representatives, Wholesale and Manufacturing	32,401	32,767	1.1	366	3,623
17	Cooks, Restaurant	24,488	24,686	0.8	198	3,606
18	Nursing Assistants	31,265	31,249	-0.1	-16	3,463
19	Secretaries and Administrative Assistants	31,278	31,306	0.1	28	3,354
20	Bartenders	19,160	19,341	0.9	181	3,316



CountySnapshot Nobles

This month of County Snapshots starts us off in the extreme southwest corner of Minnesota with Nobles County. Bordered by Rock, Pipestone, Murray, Cottonwood, and Jackson counties, Nobles County also shares its southern border with Iowa. The county was named for William H. Nobles, a member of the Territorial Legislature.

Nobles County was first occupied by the Sisseton Indians, with new settlers first coming to the area in 1842. Organized in 1849, Nobles County was officially created by the Minnesota Legislature in May, 1857. It wasn't until 1870, however, that a county government was set up. One year later, in 1871, the first railroad, which traveled through Worthington, was built. Soon afterwards, the county's population began to boom. Between 1870 and 1900, the county's population skyrocketed by 12,662 percent (yes, that much), essentially going from non-existent to 15,000 people over 30 years. Over the next 70 years, the county added an additional 8,300 people, before contracting by 3,100 people through 1990. Between 1990 and 2016, Nobles County's population resumed growing, albeit at a much more gradual pace.

Nobles County's largest city and the county seat is Worthington, with 13,136 people, Adrian being the only other city with more than 1,000 people. Altogether, just over 77 percent of the county's total population live within one of 11 cities The remaining residents make their homes within the county's 20 townships.

Economy

Estimates	Nobles County	Minnesota
Population	21,848	5,519,952
Labor Force	11,386	3,100,406
Average Unemployment	3.3% (374 people)	3.8% (117,059 people)
Per Capita Income	$24,188	$33,225
Cost of Living, Individual	$25,891 ($12.45 per hour)	$31,656 ($15.22 per hour)
Cost of Living, Average Family	$44,214 ($14.17 per hour)	$57,624 ($18.47 per hour)

Source: DEED Local Area Unemployment Statistics March 2018; DEED Cost of Living in Minnesota 2018; U.S. Census Bureau, 2016 American Community Survey Estimates:

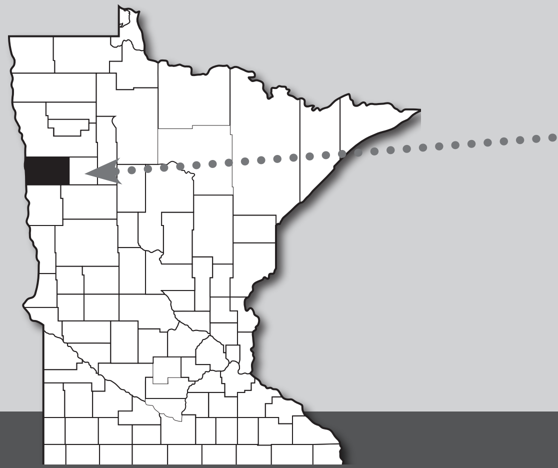
As of annual 2017, Nobles County had 614 establishments supplying 10,451 jobs. 63.1 percent of these jobs were in Manufacturing, Educational and Health Services, and Retail Trade. Within the past five years, between 2012 and 2017, most employment growth was in Manufacturing, Financial Activities, Educational and Health services, and Agriculture. Nobles County's total employment has fluctuated quite a bit since 2000. For example, between 2002 and 2006, the county gained about 530 jobs. After no change between 2006 and 2009, the county lost about 300 jobs between 2009 and 2013. Since 2013, the county has regained those 300 jobs, growing by an annual average of 0.7 percent during that time.

According to the U.S. Census of Agriculture, Nobles County had 995 farms in 2012, with an average farm size of 382 acres. With the market value of products sold approaching $478 million in 2012, the county is especially known for cattle, hogs and pigs, corn for silage, and soybeans.

Industry

	2017 Annual Data			2012 – 2017 Percent Change	
Top Industries of Employment	Number of Firms	Number of Jobs	Average Wage	Employment	Average Wage
Total, All Industries	**614**	**10,451**	**$41,600**	**265 (2.6%)**	**18.5%**
Manufacturing	33	3,008	$52,312	183 (6.5%)	15.9%
Educational and Health Services	64	2,222	$42,016	141 (6.8%)	20.4%
Trade, Transportation, and Utilities	170	2,156	$32,916	-204 (-8.6%)	7.5%
Leisure and Hospitality	43	612	$14,768	-184 (-23.1%)	33.3%

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



CountySnapshot Norman

With 1,629 people, Ada is Norman County's largest city and also the county seat. Other larger cities include Twin Valley (784 people), Halstad (568 people), and Hendrum (298 people). Altogether, Norman County's eight cities account for just about 60 percent of the county's total population of 6,579 people. The remaining 40 percent reside in the county's 24 townships, with Wild Rice Township being the largest (334 people). Flom, Fossum, McDonaldsville, and Home Lake townships all have over 180 people.

Norman County was organized in February, 1881. In 1890 the county had an estimated population of 10,618 people. Over the next decade the population spiked by nearly 42 percent, reaching just over 15,000 people. Through the 1940s the county's population swayed back and forth, essentially staying around 14,400 people. Since 1940, however, the county's population has been in continuous decline. Between 1940 and 2010, Norman County's total population declined by about 54 percent or nearly 7,900 people. Population loss has started to level off recently, with just 273 people exiting between 2010 and 2016.

Economy

Estimates	Norman County	Minnesota
Population	6,579	5,519,952
Labor Force	3,352	3,100,406
Average Unemployment	5.9% (197 people)	3.8% (117,059 people)
Per Capita Income	$26,270	$33,225
Cost of Living, Individual	$27,464 ($13.20 per hour)	$31,656 ($15.22 per hour)
Cost of Living, Average Family	$46,703 ($14.97 per hour)	$57,624 ($18.47 per hour)

Source: DEED Local Area Unemployment Statistics March 2018; DEED Cost of Living in Minnesota 2018; U.S. Census Bureau, 2016 American Community Survey Estimates

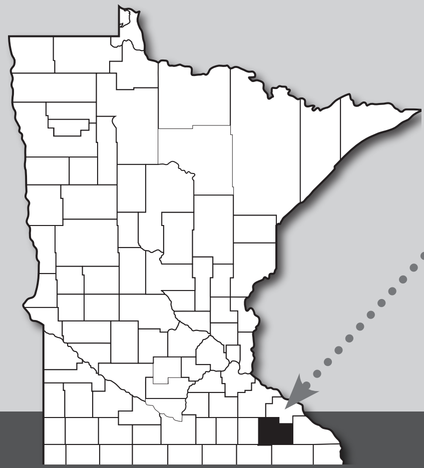
As of 2017 Norman County had 236 establishments supplying 1,694 jobs. Over one-third of these jobs, 36.5 percent, were in Educational and Health Services with 383 jobs in Health Care and Social Assistance and 234 jobs in Educational Services. Other industries with significant employment in Norman County include Public Administration (189 jobs), Retail Trade (188 jobs), and Agriculture (148 jobs). Total employment in Norman County has been steadily declining since the turn of the century. More specifically, between 2000 and 2017, the county shed 362 jobs, declining by 17.6 percent. In recent years, between 2015 and 2017, total employment bumped up slightly by 2.5 percent or approximately 40 jobs.

Mention should also be made of Norman County's agriculture, especially because of the rich soil of the Red River Valley. According to the U.S. Census of Agriculture, the county had 610 farms in 2012, with an average farm size of 873 acres. With the market value of products sold north of $281 million in 2012, the county is especially known for soybeans, spring wheat, and sugarbeets.

Industry

	2017 Annual Data			2012 – 2017 Percent Change	
Top Industries of Employment	Number of Firms	Number of Jobs	Average Wage	Employment	Average Wage
Total, All Industries	**236**	**1,694**	**$36,764**	**-47 (-2.7%)**	**16.3%**
Educational and Health Services	28	618	$35,776	24 (4.0%)	15.8%
Trade, Transportation, and Utilities	67	364	$36,504	-26 (-6.7%)	3.2%
Public Administration	11	189	$32,084	+1 (0.5%)	24.1%
Natural Resources and Mining	42	148	$39,104	22 (17.5%)	20.4%

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



CountySnapshot Olmsted

The Olmsted County region was originally home to the Dakota, Ojibwa, and Winnebago, with French and English explorers arriving in the area beginning in the 1660s. It wasn't until 1855 that Olmsted County was created from parts of Winona, Fillmore, and Wabasha counties. The county is named after David Olmsted, a newspaper publisher, fur trader, and fourth mayor of St. Paul. Ironically, David Olmsted never lived in Olmsted County.[1]

Interestingly, Olmsted County is one of four Minnesota counties not to have any natural lakes, the other three being Mower, Pipestone, and Rock counties. While there are no natural lakes, there are six reservoirs for residents of the county to enjoy.

Passing along U.S. Highways 52, 14, or 63 one is bound to come to the City of Rochester, the county seat. With a population of over 114,000 people, Rochester is Olmsted County's most populous city and Minnesota's third most populous city. Rochester is well known for being home to the Mayo Clinic, recently ranked first on the U.S. News & World Report's list of "Best Hospitals in the United States."[2] Olmsted County's other cities include Stewartville, Byron, Pine Island (partly), Chatfield (partly), Eyota, Oronoco, and Dover.

Economy

Estimates	Olmsted County	Minnesota
Population	153,102	5,519,952
Labor Force	86,640	3,100,406
Average Unemployment	3.0% (2,601 people)	3.8% (117,059 people)
Per Capita Income	$36,143	$33,225
Cost of Living, Individual	$29,182 ($14.03 per hour)	$31,656 ($15.22 per hour)
Cost of Living, Average Family	$52,803 ($16.92 per hour)	$57,624 ($18.47 per hour)

Source: DEED Local Area Unemployment Statistics March 2018; DEED Cost of Living in Minnesota 2018; U.S. Census Bureau, 2016 American Community Survey Estimates

As of 2017 Olmsted County had 3,412 establishments supplying 97,295 jobs. Over half of these jobs, 51.3 percent, were in Educational and Health Services with 44,246 jobs in Health Care and Social Assistance and 5,487 jobs in Educational Services. Other industries with significant employment in Olmsted County include Retail Trade (10,463 jobs), Accommodation and Food Services (7,935 jobs), and Manufacturing (6,666 jobs). Within Manufacturing, Olmsted County is especially known for Computer and Electronic Product Manufacturing (2,780 jobs) and Food Manufacturing (1,665 jobs). The county is also home to an estimated 1,150 farms.

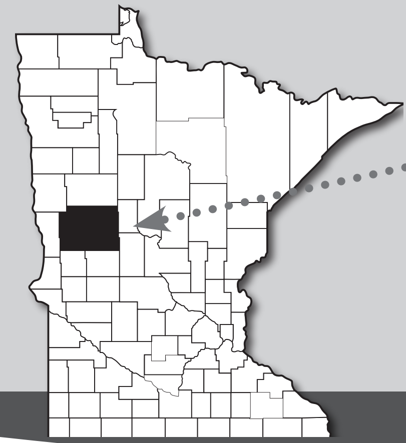
Total employment in Olmsted County has been steadily increasing since the end of the Great Recession in 2010. More specifically, the county gained over 9,970 jobs between 2010 and 2017, growing by 11.4 percent. This increase was on pace with statewide growth during that period of time, which was 11.3 percent.

Industry

	2017 Annual Data			2012 – 2017 Percent Change	
Top Industries of Employment	Number of Firms	Number of Jobs	Average Wage	Employment	Average Wage
Total, All Industries	**3,412**	**97,295**	**$59,800**	**6,275 (6.9%)**	**14.1%**
Educational and Health Services	411	49,867	$73,944	4,862 (10.8%)	14.3%
Trade, Transportation, and Utilities	742	13,953	$32,500	241 (1.8%)	11.0%
Leisure and Hospitality	400	8,930	$19,344	947 (11.9%)	24.0%
Manufacturing	107	6,666	$80,444	-1,109 (-14.3%)	9.3%

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

[1]History of Olmsted County, County of Olmsted, https://www.co.olmsted.mn.us/yourgovernment/Pages/HistoryofOlmstedCounty.aspx.
[2]U.S. News Hospitals Rankings and Ratings, U.S. News & World Report, https://health.usnews.com/best-hospitals. Accessed 14 May 2018.



CountySnapshot
Otter Tail

Otter Tail County has more than 1,000 lakes, more lakes than any other single county in the United States, among them five Round Lakes, 12 Long Lakes, 13 Mud Lakes, and, of course, Otter Tail Lake. NOTE: the county is spelled as two words, the city as one.

As with Olmsted County, Otter Tail County was originally home to the Dakota and Ojibwa. French and English fur traders began exploring the area more and more in the 19th century, with trading posts established on Leaf Lake and Otter Tail Lake. Otter Tail County was officially established in March, 1858. Shortly thereafter, the County's population exploded, going from 240 people in 1860 to 45,375 people in 1900.[1]

For most of the 20th century Otter Tail County's population remained largely unchanged. After rising gradually through 1940, the population decreased slightly through 1970. Between 1900 and 1970 the county's population only increased by 1.6 percent or just over 700 people. Since 1970, however, the county's population has grown by 26.0 percent, adding about 12,000 people. The word on all of the lakes in the area must have gotten out.

Economy

Estimates	Otter Tail County	Minnesota
Population	58,085	5,519,952
Labor Force	32,207	3,100,406
Average Unemployment	5.2% (1,676 people)	3.8% (117,059 people)
Per Capita Income	$28,781	$33,225
Cost of Living, Individual	$27,589 ($13.26 per hour)	$31,656 ($15.22 per hour)
Cost of Living, Average Family	$46,600 ($14.94 per hour)	$57,624 ($18.47 per hour)

Source: DEED Local Area Unemployment Statistics March 2018; DEED Cost of Living in Minnesota 2018; U.S. Census Bureau, 2016 American Community Survey Estimates

As of 2017 Otter Tail County had 1,752 establishments supplying 23,002 jobs. Health Care and Social Assistance is Otter Tail County's largest-employing industry with 4,578 jobs. Manufacturing, with 4,260 jobs, and Retail Trade, with 2,748 jobs, round out the county's top-three employing industries.

After losing 664 jobs (3.0 percent) between 2008 and 2009, Otter Tail County's total employment has increased at an average annual rate of 1.0 percent through 2017. This is equivalent to more than 1,700 jobs gained between 2009 and 2017. Within the last year of available data, between 2016 and 2017, the county added over 430 jobs, growing by 1.9 percent. Recently employment growth in Otter Tail County has been led by Manufacturing, Educational Services, Health Care and Social Assistance, Construction, and Administrative and Support Services.

Industry

	2017 Annual Data			2012 – 2017 Percent Change	
Top Industries of Employment	Number of Firms	Number of Jobs	Average Wage	Employment	Average Wage
Total, All Industries	**1,752**	**23,002**	**$38,480**	**1,122 (5.1%)**	**16.7%**
Educational and Health Services	199	6,208	$39,104	225 (3.8%)	14.8%
Trade, Transportation, and Utilities	387	4,470	$37,076	-82 (-1.8%)	16.5%
Manufacturing	94	4,260	$46,228	472 (12.5%)	18.5%
Leisure and Hospitality	192	2,176	$14,664	61 (2.9%)	27.0%

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

by Tim O'Neill

[1]"History and Settlement." , County of Otter Tail, https://web.archive.org/web/20090625185421/www.co.otter-tail.mn.us/gis/soilsurvey03history.php. Accessed 14 May 2018.