The EDACENTER

at the University of Minnesota Crookston

Economic Composition of Southwest Minnesota: Industries and Performance

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UNIVERSITY OF MINNESOTA | EXTENSION

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About The EDA Center

The EDA Center at the University of Minnesota Crookston is one of more than 40 university centers nationwide, supported by the Economic Development Administration, U.S. Department of Commerce. The EDA Center conducts applied research, provides direct technical assistance and delivers educational programs to economic development agencies that support the economy of economically-distressed communities throughout Minnesota.

Our Mission:
Our mission is to engage university faculty, staff and students with local, county tribal and regional economic development agencies in support of our Minnesota economy. Our focus is to utilize the capacity of the University of Minnesota Crookston in partnership with the broader U of M system and economic development agencies to support job creation, capital investment, business recruitment, and job retention.

To learn more about The EDA Center go to: www.edacenter.org.

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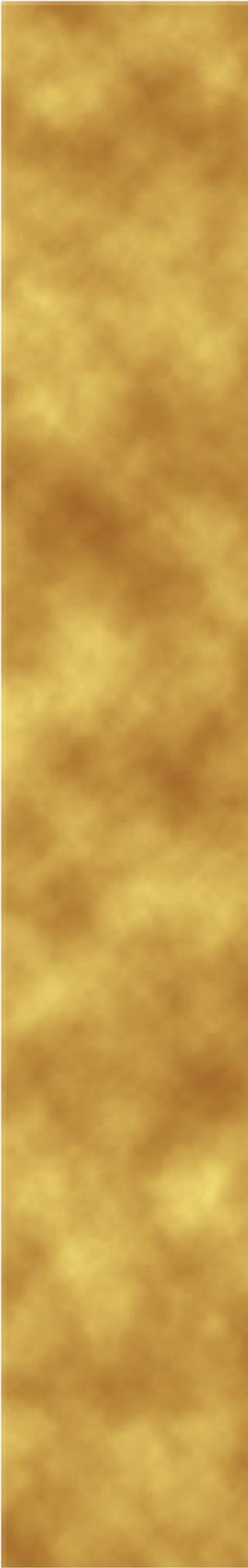
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ECONOMIC COMPOSITION OF SOUTHWEST MINNESOTA: KEY FINDINGS

To analyze the economic composition of Southwest Minnesota, University of Minnesota Extension conducted an analysis of industry outputs, employment and wages, and interdependencies. Following is a report of key findings. This report is presented in partnership with the EDA Center at the University of Minnesota, Crookston.

Three main industries – manufacturing; agriculture and forestry; and professional and business services – drive Southwest Minnesota's economy. Two of the driving industries – agriculture and manufacturing- have been growing in the past 10 years and have outperformed national and industry expectations. This provides a strong platform for continued growth. Southwest Minnesota's agricultural and manufacturing industries are integrated, with the largest manufacturing sector (food) purchasing from local farm operations. A caution, as of the time of this publication, there are predictions for relatively low grain prices for the 2014 harvest. This could significantly impact the strength of the agricultural industry.

REGIONAL STRENGTHS:

- **Agriculture.** Agriculture is the industry with the highest share of employment in the region (15 percent) and contributes the second highest share of output (25 percent). In addition to being a strong base in the region, agriculture has been a growth sector that has performed above national and industry averages, making Southwest a competitive region in agriculture. The Southwest region has a higher concentration of both crop farmers and livestock producers than other regions of the state. Hog farming and cattle production are two primary livestock sectors in the region. Crop production is driven primarily by corn and soybeans.
- **Manufacturing.** Manufacturing is the industry with highest share of output in the region (30 percent) and contributes the third highest share of employment (12 percent). Food manufacturing, machinery manufacturing, and wood product manufacturing are leading the region. Southwest Minnesota is competitive in these sectors, posting positive job gains while the industry at the national level suffered job losses. Manufacturing wages are relatively high and stable in the region. The leading manufacturing sectors in the Southwest area are animal slaughtering, rendering, and processing; farm machinery and equipment manufacturing; and wet corn milling.

REGIONAL CONCERNS:

The analysis also revealed areas of potential concerns for the region, from an economic standpoint. Areas of regional concern may warrant additional attention and understanding.

- **Management of companies and enterprises.** Management of companies and enterprises (essentially corporate headquarters) is one of the major sectors in the professional and business services industry in the region. While the other sectors in the industry grew during the time period, the sector called management of companies and enterprises declined, and at a rate higher than predicted given industry and national trends. This is a high wage sector, so job losses can lead to greater effects on the economy.
- **Retail trade.** Retail trade shed jobs between 2003 and 2013. Most of those jobs losses were in non-store retailers and gasoline stations.
- **Health care.** Health care and social assistance added the most jobs in the region in the period. However, the industry grew at a slower pace than anticipated given gains in the health care industry at the national level.

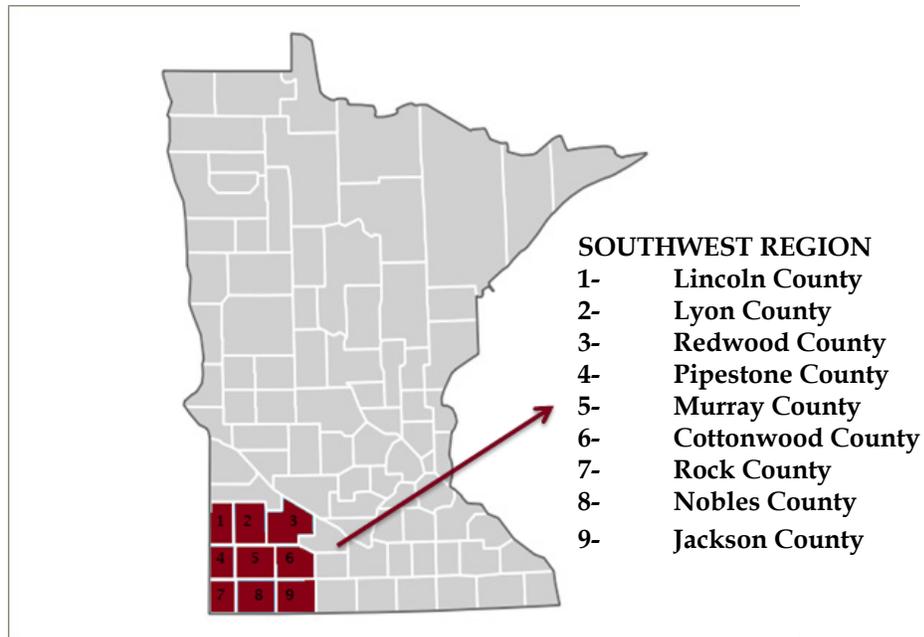## STUDY BACKGROUND AND OVERVIEW OF SOUTHWEST REGION

Minnesota's regions differ in size, social, and economic characteristics, history, and geography. These differences influence the economy of the regions, as well as economic development decisions and discussions. Therefore, conversations about Minnesota's economy and its economic future must include discussions of the diverse drivers of economic activity in the state's regions. University of Minnesota Extension, in responding to a broader conversation of the role of Greater Minnesota in the state's economy, is producing economic profile reports on Minnesota's 12 non-metro regions. This report is provided in partnership with the EDA Center at University of Minnesota, Crookston.

Located at the extreme southwestern corner of Minnesota, the region, represented by the Southwest Regional Development Commission, is comprised of nine counties including Cottonwood, Jackson, Lincoln, Lyon, Murray, Nobles, Pipestone, Redwood, and Rock counties. The region, located on a flat and windy prairie, is known as one of the leading agricultural producing centers in Minnesota.[1] The region is led by two regional centers (Marshall and Worthington) and several other smaller sub-regional economic hubs.

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1 Southwest Regional Comprehensive Economic Development Strategy (CEDS)2010-2013

Map 1: Map of Southwest Region in Minnesota

SOUTHWEST REGION
1-   Lincoln County
2-   Lyon County
3-   Redwood County
4-   Pipestone County
5-   Murray County
6-   Cottonwood County
7-   Rock County
8-   Nobles County
9-   Jackson County

This report explores industry outputs, employment, and wages by industry and sector, and industry interdependencies in the region. The goals of the report are to 1) identify the region's strengths – both industries that are the current core of the economy and emerging industries – and 2) identify concerns for the region. Regional concerns focus on industries which may be underperforming or declining.

To ascertain which industries are regional strengths and which are potential regional concerns, this report draws from output, employment, and wage data. The first section looks at industry outputs. Output measures the value of sales by industry. Studying output by industry provides perspective on which industries are driving the highest sales in the region. The second section details employment. Studying employment by industry provides perspective on the industries employing the highest number of people in the region. The employment section of this report also discusses wages. The third section of this report looks at economic interdependencies. Examining how sectors interact and connect with each other can provide powerful insights into an economy.

INDUSTRY OUTPUT

Output is an important factor to consider when assessing the economic composition of a specific geography. Output provides information about the economic activity of a region and also is directly tied to employment.

In 2012, businesses and industries in the Southwest region produced $14.6 billion in goods and services, according to estimates from the IMPLAN economic model. Output in the Southwest region accounts for approximately 2 percent of Minnesota's $567.8 billion economy and 7 percent of Greater Minnesota's $218.8 billion economy. The manufacturing industry produced 30 percent of the output; agriculture and forestry produced 25 percent; and professional and business services produced 17 percent (chart 1). These three

industries produced 72 percent of all output in the region.

Chart 1: Industry Share of Total Output Southwest Minnesota
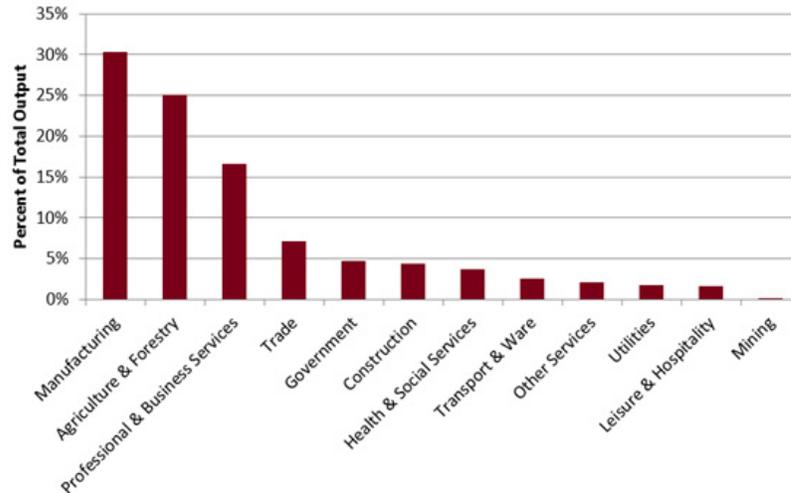
Chart 1 shows output by major industry category, helping to frame discussions about output in the region. However, examining output by sector can be valuable too. Sectors are a more refined level of analysis. Individual sectors form industries. For example, crop production and animal production are sectors within the industry of agriculture.

Beyond the major industry categories, the top ten sectors in the Southwest region produce an estimated $10.6 billion of output (table 1). Food product manufacturing, crop farming, and livestock production are the top generators of output in the region. Within the food product manufacturing sector, animal slaughtering, rendering, and processing produces $1.1 billion of output. Wet corn milling produces $580 million in output. Within crop farming, grain farming (primarily corn) produces $1.5 billion in output and oilseed farming (primarily soybeans) produces nearly $700 million of output. In the livestock production sector, hog production accounts for $800 million of output, and cattle ranching accounts for $360 million.

As a note here, the value of agricultural production, especially in the crop sector, is dependent on the price of the commodity. Grain and oilseed commodity prices have been strong in recent years. At the time of publication of this report, predictions hold that corn prices could fall below production costs for the 2014 harvest. Low commodity prices and potential farm losses could impact the strength of the agricultural industry in Southwest Minnesota.

For the majority of the sectors in table 1, high output is driven by high productivity (output per worker). Each food product manufacturing employee produces an estimated $505,800 in output annually. The clear exception in the table is government and government-owned enterprises. Government output is linked primarily to the number of employees. Output is also not a very adequate measure for the government sector, as government does not make sales in the traditional sense of other industries. Output per worker is often lower for service or labor intensive industries, as it takes more workers to produce output.

The industries with the lowest output per worker in the region include private households (households providing services to other households, such as cleaning) and agriculture and forestry support activities (including custom planting, harvesting, and fertilizer application). Since the model measures one job as one job, these two industries, which have relatively high seasonal and part-time employment, likely have lower output per worker because a significant share of the workers are working less than full-time.

| TABLE 1: TOP TEN SECTORS HEADWATERS REGION, SORTED BY OUTPUT		
Sector	Total Output (millions)	Output per Worker
Food product manufacturing	$2,526.7	$505,800
Crop farming	$2,276.2	$335,400
Livestock production	$1,340.4	$273,700
Machinery manufacturing	$839.3	$482,800
Real estate establishments	$778.6	$496,500
Government & government-owned enterprises	$686.7	$61,000
Construction	$639.2	$149,300
Monetary authorities	$621.0	$411,200
Wholesale trade	$595.7	$183,200
Scientific and technical services	$282.9	$108,800
TOP TEN TOTAL	**$10,586.7 (73%)**	
TOTAL OUTPUT IN REGION	**$14,563.9**	
Source: IMPLAN		

EMPLOYMENT AND WAGES

Employment in the region drifted up and down between 2000 and 2013 (see chart 2). In 2001, there were 53,200 jobs in the region.[2] This shot up to close to 54,500 in 2008. The region was however affected by the recession, which decreased employment between 2008 and 2012. By 2013, total employment increased to 54,300, or within 200 jobs of the 2008 peak. Overall, the Southwest region fared relatively well during the Great Recession of 2008 -2009, especially when compared to other regions in Minnesota.

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2 Quarterly Census of Employment and Wages

Chart 2: Total Employment 2000-2013, Southwest Minnesota
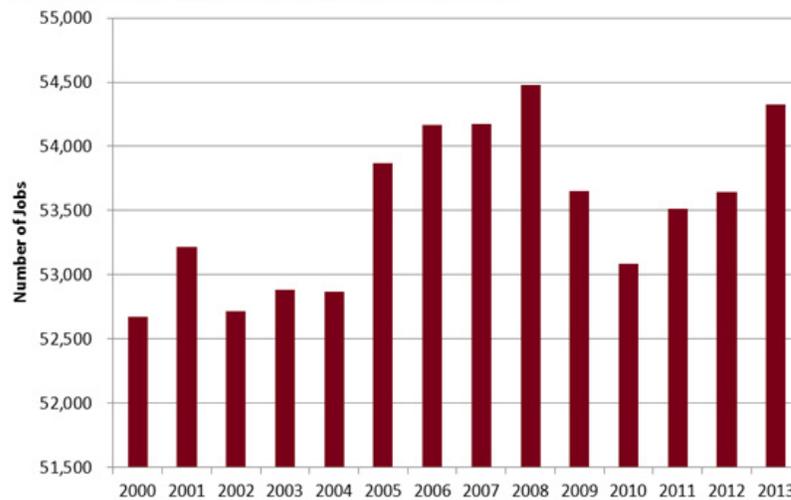
Source: QCEW

The highest employment growth industries between 2003 and 2012 were health care and social assistance (845 new jobs); agriculture, forestry, fishing and hunting (720 new jobs); and manufacturing (403 new jobs). The industries suffering the most jobs losses during the period include government (904 lost jobs), retail trade (696 lost jobs), and other services (396 lost jobs).[3]

Shift-share analysis provides an examination of the drivers of growth and decline for a specific industry in a specific region by comparing to industry and national trends. The analysis provides an interesting interpretation of the changes in each industry (table 2). In this analysis, the primary focus is on the competitive effect. A strongly positive competitive effect indicates particular characteristics of the local economy are driving growth in the region. A strongly negative competitive effect can be interpreted as a warning that the local economy may not be faring as well as it should. For more on shift-share analysis and how to fully interpret the results, please see page 13.

With 845 new jobs, the health care and social assistance industry posted the largest employment gains in the region. However, shift-share analysis reveals it gained fewer jobs than expected given national and industry trends. Had the industry grown at the same rate as the health care and social assistance industry in the United States as a whole, the Southwest region would have added 1,241 new jobs. If the health care and social assistance industry had grown at the rate of overall employment in the nation for all industries, it should have added 204 jobs.

In total, industry and national averages would predict an addition of 1,445 jobs. However, the industry only added 845 jobs, or 600 fewer jobs than should have been created. The competitive effect then is a negative 600 jobs. The region is not adding health care jobs at the rate one would expect.

In contrast, the manufacturing and agriculture industries are extremely competitive. Nationally, manufacturing has suffered significant jobs losses. However, Southwest Minnesota posted moderate gains. If manufacturing in the region had declined at the same rate as manufacturing in the nation, it would have shed 1,981 jobs. However, the region added 403 new jobs.

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3 EMSI

As shown in the chart below, agriculture in the Southwest region also outperformed agriculture in the nation.

TABLE 2: SHIFT-SHARE ANALYSIS FOR GROWTH AND DECLINE INDUSTRIES[4]				
Industry	Change 2003-2013	Industry Mix Effect	National Growth Effect	Competitive Effect
Top 3 Job Adding Industries				
Health Care and Social Assistance	845	1,241	204	(600)
Agriculture, Forestry, Fishing & Hunting	720	(152)	84	788
Manufacturing	403	(1,981)	276	2,107
Top 3 Job Loss Industries				
Other Services, except Public Admin.	(396)	100	93	(589)
Retail Trade	(696)	(295)	203	(604)
Government	(904)	(98)	346	(1,153)
*Source: EMSI				

Southwest Minnesota suffered a lack of competitiveness in industries in which it lost jobs. Given national and industry trends, the industry called "other services" should have gained nearly 200 jobs; however, the region lost nearly 400 jobs in the industry. Other services is a catch-all category for a range of services that do not fit into the other designated categories for services. The other services category broadly includes two types of services: 1) maintenance and repair services (automobiles, computers, electronics), and 2) personal services (such as barber shops and beauty salons).

Retail trade and government are also industries which suffered nationally during the recession. However, Southwest Minnesota lost jobs at a higher rate than expected given national and industry trends. In retail trade, 225 of these lost jobs were in the non-store retailer category. Non-store retailers include electronic sales, mail order sales, vending machine sales, and fuel dealers. Another 151 of the lost jobs were in the gasoline stations category. General merchandise retailers added 72 jobs in the time period.

Key things for economic developers to consider from this employment data:

- Find ways to support competitive industries. This will likely mean engaging industry leaders to discuss the key drivers of economic advantage in this region.

- For some non-competitive industries, it's important to learn more about the key drivers. Retail trade had especially difficult years between 2003 and 2012. Understanding the nature of this change will be key to mitigating the negative effects in the future.

- Further, the region should be adding more health care jobs. Sioux Falls, with its geographic location and its status as a regional hub, may be driving some of these downward trends for Southwest Minnesota.

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4 For an explanation of shift-share analysis, please see the methodology section.

Employment and Wages by Industry

Employment in the Southwest region is fairly balanced across industries (chart 3). The highest percentages of employment are in the industry categories of agriculture and forestry; professional and business services; government; and manufacturing. For this nine-county region of Southwest Minnesota, two of its biggest employment industries are also the competitive, growth industries identified above – agriculture and manufacturing.

Chart 3: Employment by Industry: Southwest

- Government 14%
- Agriculture & Forestry 15%
- Mining 0%
- Utilities 1%
- Construction 5%
- Other Services 6%
- Manufacturing 12%
- Leisure & Hospitality 6%
- Health & Social Services 10%
- Trade 13%
- Professional & Business Services 14%
- Transport & Ware 4%
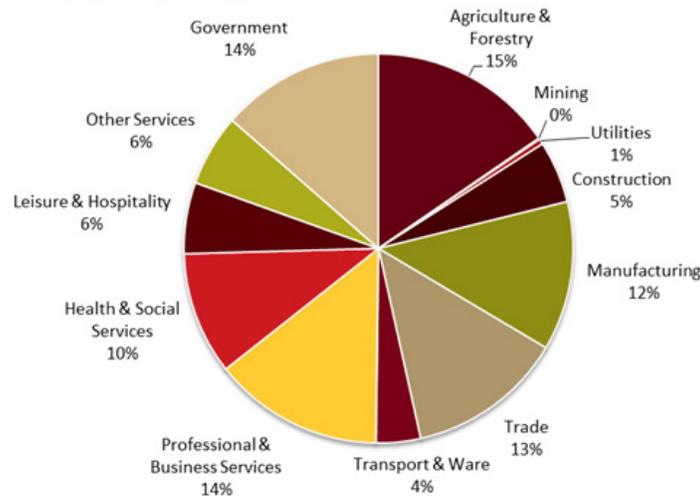
Agriculture

A more detailed look at sectors within industries shows additional regional strengths. Within the agriculture and forestry industry, grain farming is the largest farming activity in the region, employing approximately 41 percent of farmers in the region. Hog production is the second largest contributor to the agricultural industry in the region accounting for 35 percent of the sector's total employment. Both crop production and animal production are strengths for the region. Shift-share analysis shows positive gains for competitive share in both industries from 2003-2013.

One way to measure the strength of an industry in a region is to consider the location quotient, which compares an industry or sector in the region to a larger area of study. Location quotients are 1.5 for crop production and 5.0 for animal production in the Southwest region. A location quotient over 1 indicates the industry has a higher level of employment, or a concentration, as compared to the state. The higher the location quotient is the higher the concentration of employment. Please see page 13 for an explanation of location quotients.

Professional and Business Services

The second largest employment industry is professional and business services. It employs 14 percent of the region's employees. The professional and business services industry is comprised of a broad range of sectors. The highest numbers of employees in the Southwest region are in the sectors of finance and insurance, scientific and technical services, and administrative and waste services.

Wages rose significantly in the professional and business services industry between 2000 and 2013. In 2000, the average weekly wage in the region was an inflation-adjusted $570 (adjusted to 2013 dollar levels). By 2013, this had increased to $945, a 66 percent increase. Lyon County has the highest average weekly wages in the industry at $1,119. Redwood ($908) and Pipestone ($879) have the second and third highest, respectively. Lincoln County has the lowest average weekly wages in the industry at $545.

Increases in the weekly wage in this industry are being driven primarily by the sectors of management of companies and enterprises ($1,473 per week). Lyon County is the home county for several corporate headquarters and likely is driving these wage changes.

Unfortunately, the sector called management of companies and enterprises lost jobs between 2003 and 2013 in the region. The competitive share was also negative, indicating that this important wage driver is declining faster in the region than it should be based on industry and national trends. The other two large sectors, finance and insurance services and scientific and technical services, added jobs and posted positive competitive shares during the time period.

Manufacturing

The third largest employment industry is manufacturing. It employs 12 percent of the region's employees. Employment in the industry declined in the early 2000s. In 2005, the industry began growing again. The Great Recession caused the industry to shed jobs between 2008 and 2010. Growth began again in 2011.

Within the manufacturing industry, the largest employers are food production, machinery manufacturing and wood products. The food production sector has performed well in the Southwest region. It gained nearly 600 jobs between 2003 and 2012 when the industry itself lost jobs, making Southwest a competitive region. The location quotient is 5.3 indicating a regional specialization. Machinery manufacturing also performed well, adding jobs, primarily because of the region's competiveness. Wood product manufacturing lost jobs, but at a much lower rate than would have been predicted given national and industry trends.

Manufacturing wages have risen modestly in the region since 2000. In 2000, the industry's average weekly wage was $750 (in 2013 inflation adjusted numbers). By 2013, wages had risen to $820 per week. Wages dropped slightly during the recession of the early 2000s but rose during the Great Recession. Average weekly wage is highest in the chemical manufacturing sector at $1,130. Machinery manufacturing pays an average of $939 a week, nonmetallic mineral mining $856 a week, and food production $823 a week. Manufacturing wages are highest in Jackson ($956), Lyon ($894), and Nobles ($841) counties. Average weekly wages are lowest in Murray County ($556).

LOCAL INTERDEPENDENCIES

Beyond studying basic structure, examining how sectors interact with each other can provide powerful insights into an economy. Input-output models have been developed to estimate how sectors connect within a region. This section of the report will examine the two main drivers of the Southwest

economy - agriculture and manufacturing - and their connections with other sectors. Specifically, the analysis will focus on 1) grain farming and 2) animal slaughtering, rendering, and processing. These are the two largest sectors within their respective industries, as measured by output.

Multipliers include both indirect and induced effects. Indirect effects are generated when a firm purchases inputs (goods and services) from other business establishments which in turn purchase the goods and services needed for their output. These are often referred to as supply chain effects. Induced effects are generated when employees of a local industry spend their wages in the region. The discussion here focuses on indirect effects.

Multipliers are driven by the amount of purchases a sector makes from other sectors. Understanding what inputs are necessary for the production of a good or service and the extent to which those inputs are produced locally can provide insights into the potential for economic development from the sector.

Agriculture

Output multipliers for the agricultural sectors in the Southwest region are estimated to range from 1.3 to 1.4. In other words, for every dollar of output generated by the sector (corn farming, for example), $0.30 to $0.40 cents are generated in other regional sectors that supply that sector.

Table 3 highlights expenditures by grain farm operations. For every dollar spent on inputs, grain farm operations are estimated to spend 11 percent on real estate (land), 10 percent on fertilizer, and 10 percent on agricultural support services. Land is a fixed commodity, so all demand is satisfied locally. However, the region does not produce fertilizer or agricultural support services in high enough quantities to satisfy the local demand. Therefore, grain farm operations are importing those items from elsewhere.

TABLE 3: TOP PURCHASES BY GRAIN FARMING OPERATIONS IN THE SOUTHWEST MINNESOTA REGION, PERCENT OF TOTAL EXPENDITURES, AND LOCAL AVAILABILITY		
Input	**Percent of Input Expenditures**	**More than 50% of Demand Available from Suppliers within the Northeast Region**
Real estate	11%	Yes
Fertilizer	10%	No
Agricultural support services	10%	No
Petroleum products	8%	No
Banks	8%	Yes
Grains	8%	Yes
Pesticides and other chemicals	7%	No
Wholesale trade	3%	Yes
Maintenance and repair of buildings	1%	Yes
Truck transportation	1%	Yes
Source: IMPLAN		

Table 3 helps illustrate two points. First, grain farm operations are important sources of local demand for real estate (land), banking institutions, other

grain operators (seed suppliers), and wholesale trade operations.[5] These industries and sectors with strong connections to grain farming are the top industries capturing the 30 to 40 cents of additional economic activity that flows from every dollar of agricultural output mentioned above. Second, there may be opportunities for increased local production of fertilizer, agricultural support services, and pesticides, because grain farmers are purchasing significant levels of these outputs from outside the region. Pursuing economic development based on possible opportunities for supply chain development is one economic development approach. However, before moving forward, decision-makers should: 1) take a scan of the industry, as it could be that the suppliers are located just outside the region as defined for this study and therefore could be considered local: and, 2) explore the reasons for the current industry location, as location decisions are based on a broad variety of factors including proximity to supplies and transportation routes.

Manufacturing

Multipliers for food product manufacturing sectors are estimated to range from 1.3 to 1.7. Manufacturing multipliers are often higher than agriculture, particularly if they use an agricultural product in their manufacturing process. Table 4 shows the top inputs purchased locally by animal slaughtering facilities, the percent of total input expenditures spent on the item, and the local availability of the item.

For every dollar spent on inputs in the animal slaughtering process, 60 percent is spent on the purchase of the animal itself. In Southwest Minnesota, animal slaughtering facilities spend nearly $400 million on animals. To the extent that these animals are produced locally, this drives high sales for local producers.

TABLE 4: TOP PURCHASES BY OFFICES OF HEALTH CARE PRACTITIONERS IN THE HEADWATERS MINNESOTA REGION, PERCENT OF TOTAL EXPENDITURES, AND LOCAL AVAILABILITY		
Input	**Percent of Input Expenditures**	**More than 50% of Demand Available from Suppliers within the Northwest Region**
Animal production	60%	Yes
Processed animal meats	14%	Yes
Wholesale trade	2%	Yes
Management of companies	2%	No
Truck transportation	2%	Yes
Electricity	1%	Yes
Banks	1%	Yes
Paperboard containers	1%	No
Seasonings and dressings	1%	No
Natural gas	1%	No
Source: IMPLAN		

These two examples (grain farming and animal slaughtering, rendering and processing) demonstrate the importance of economic interdependencies and

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5 Local here is the Southwest region.

interactions in the region. In general, industries that purchase from local suppliers tend to have higher economic impacts in the region.

METHODOLOGY, DATA, AND SOURCES

This report presents the economic characteristics of the region and an analysis of industries, income and employment. Three data sources were accessed in the preparation of the report. One data source is the IMPLAN database. IMPLAN is an input-output model developed by MIG, Inc. The database compiles a variety of sources to provide data on output, employment, and labor income by county for 440 economic sectors. A second data source is the Quarterly Census of Employment and Wages (QCEW) data provided by the Minnesota Department of Employment and Economic Development. This data is used, when necessary, to compliment or clarify the IMPLAN data. Finally, data from Economic Modeling Specialists International (EMSI) is presented in this report. The EMSI data in this report is derived from QCEW data; however, EMSI provides simple tools for performing calculations, such as shift-share analysis, on the data.

The Regional Development Commission boundaries were used for this study's definition of Southwest Minnesota. The North American Industry Classification System (NAICS) code was used in the study. The NAICS is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. This was used to enable uniformity and also for easy data accessibility.

Finally, data was analyzed with input from Extension Educators in the region and findings were compiled into the report.

Shift-Share Analysis

The results of shift-share analysis are presented in this report. Shift-share analysis is a powerful tool for understanding the drivers of economic change in an industry.   Shift-share analysis parses economic change (here employment changes) into three components: national growth, industrial mix, and competitive share.

- National Growth: National growth indicates how many jobs a local economy would have gained (or lost) as a result of the growth (or decline) of employment at the national level. For example, consider a local economy with 100,000 jobs at the beginning of the time period. If during the period under consideration, the number of jobs in the United States grew by a rate of 2 percent, then at the end of the time period under consideration, the local economy would be expected to have 102,000 jobs.

- Industrial Mix: Industrial mix indicates how many jobs a particular industry within the local economy would have gained (or lost) if the local industry grew (or declined) at a rate similar to the industry as a whole in the United States. For example, if 1,000 people were employed in the finance industry in the local economy at the beginning of the period, and the finance industry as a whole in the U.S. grew at a rate of 10 percent, then at the end of the time period under consideration, the local finance industry would be expected to have 1,100 jobs.

- Competitive Share: Competitive share is the remainder of change in employment for the region examined. From our example, region's employment should have grown by 2,100 jobs, looking at overall national growth and then growth in the finance industry itself. If the local economy actually grew by 3,100 jobs in the finance industry, then 1,000 jobs were added because the local economy grew faster than expected, given national and industry trends. Conversely, if the local economy grew by only 1,000 jobs, then the economy was not as competitive as it should have been, given national and industry trends.

- Percent Competitive Share: This is the percent of total jobs that are sourced from competitive share. A competitive share of 80 percent would indicate that 80 percent of the jobs during the time period were derived from the competitive share, rather than from national and industry trends.

Location Quotients

This analysis reports the location quotient for certain industries. Location quotients are used in determining the concentration of a particular industry or sector in a region compared to a larger study area. In this analysis, the location quotient for the region versus the state is reported. If, say, 30 percent of employment in a region is in health care, while at the state only 15% of employment is in health care, then the location quotient would be 2, indicating that the region has twice as much employment in health care than the state as a whole.

OTHER DATA RESOURCES

Source	Link	Description
Wilder Foundation	www.mncompass.org	Comprehensive data source for Minnesota counties and cities. In collaboration with the Initiative Foundations and others, Minnesota Compass has added data about smaller cities.
MN Demographers Office	http://mn.gov/admin/demography/data-by-topic/population-data/our-estimates/index.jsp	Go here for population estimates by EDR, County, and City/Townships. 2013 Estimates are available.
MN Land Economics	http://www.landeconomics.umn.edu/	Go here for information about land sales, land values, property taxes, soil type, etc. The data-base can be used to get information at the local, county, and state levels.
Headwaters Economics	http://headwaterseconomics.org/tools/eps-hdt	Generate your own socioeconomic profiles from federal data sources, by using the EPS-HDT Tool. The attached guidebook presents the data and provides a step by step walk-through on how to think about it.
DEED Data Tools	http://mn.gov/deed/data/data-tools/index.jsp	DEED provides access to several data tools such as labor market data, unemployment data, and many others. Most labor market data can be accessed through the labor market portal: https://apps.deed.state.mn.us/lmi/rws/
University of Wisconsin Extension	http://fyi.uwex.edu/downtown-market-analysis/understanding-the-market/demographics-and-lifestyle-analysis/	Learn more about demographic and lifestyle analysis
University of Wisconsin Extension	http://cced.ces.uwex.edu/files/2013/02/Resource-Document-Total-12.pdf	Discover useful links to sources of information for economic developers
OnTheMap	http://onthemap.ces.census.gov/	Mapping tool from the census. Use this understand where people live vs work
University of Wisconsin-Madison, Michigan Tech University, University of New Hampshire	http://www.netmigration.wisc.edu/	Use this to learn about – and visualize – migration patterns for U.S. counties.