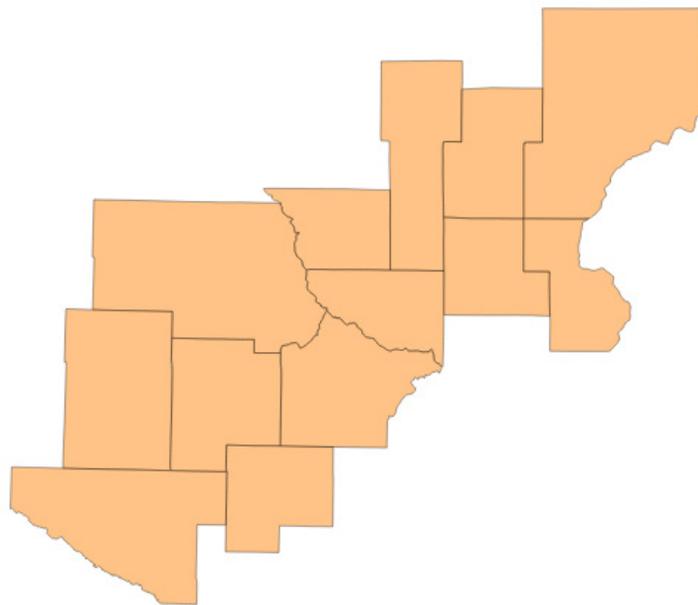


Central



November 2016

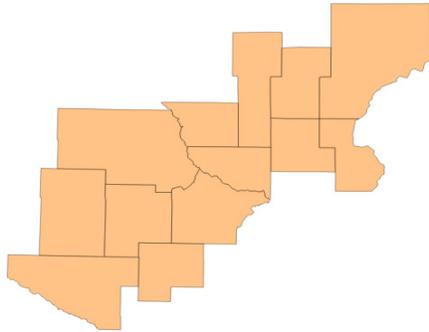
A Report on the Online Job Market in Central Minnesota



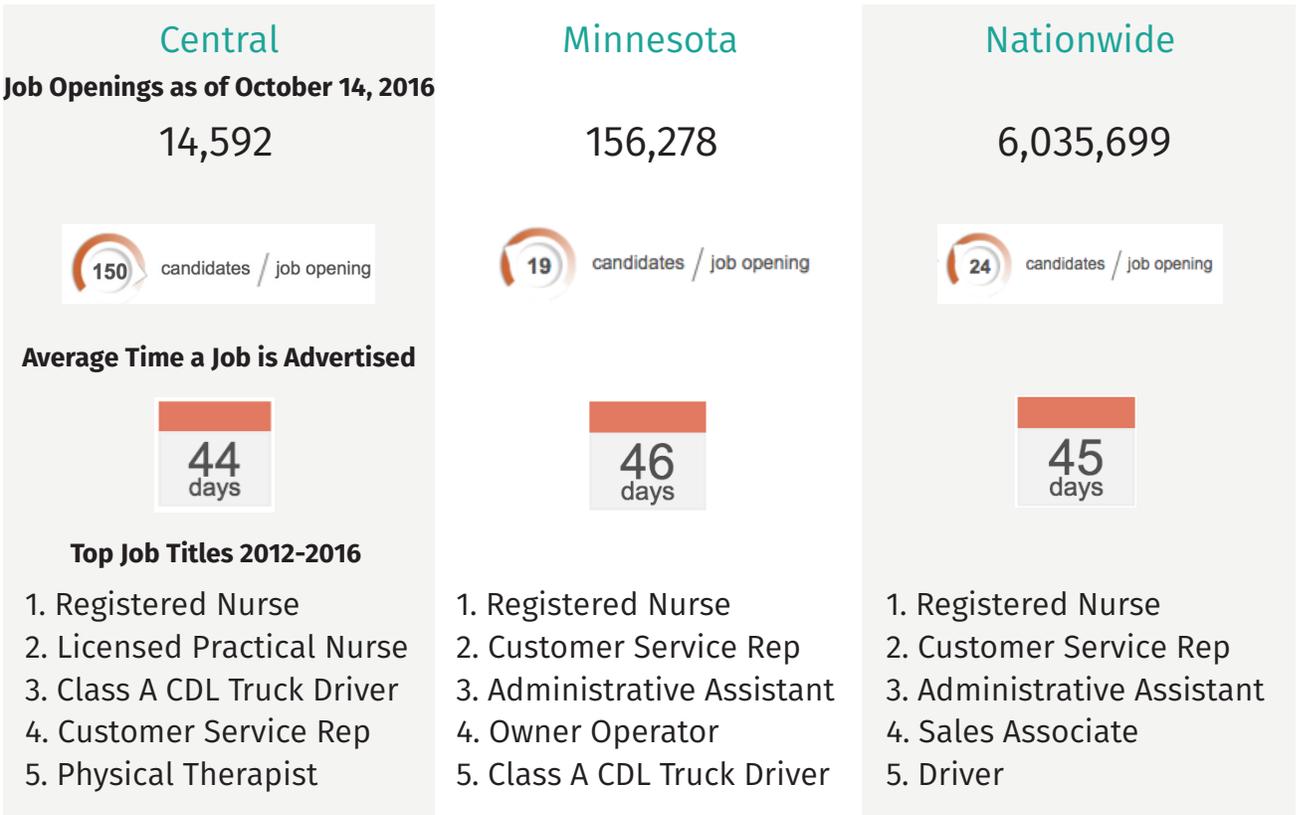
RealTime Talent

Using data to build the
world's best workforce

Central



The 13-county Central Minnesota planning region had a population of 693,108 in 2014, almost 13% of the state's population. With a larger population, yet a similar volume of jobs posted compared to other Greater Minnesota regions, the number of people in the labor force per job opening (potential candidates indicated below) is very high. This is the result of the region's highly mobile labor force, with over 40% of the region's working residents commuting outside of the region to get to their place of work. Central Minnesota is a net exporter of labor with only 198,956 workers both residing and working in the region in 2013 according to the U.S. Census Bureau.



Median Posted Salary of Positions in Central Minnesota, 2015-2016



Note: Only includes salary data that is publicly advertised in postings.

Central Industry Trends

January 2016 - September 2016

According to DEED's Occupational Employment Statistics, about 16% of all jobs held in Central Minnesota are in production manufacturing, whereas production comprises only 11% of all jobs statewide. Healthcare and social assistance jobs are expected to increase in demand by over 28% through 2022, while production manufacturing is expected to increase by only 3%. In 2014, DEED identified ten industry sub-sectors that define the region by having significantly higher concentrations of jobs and firms than seen statewide. Overall, Central Minnesota has 9.7% of the state's total employment, but is home to 25% of the state's employment in animal production, furniture, and related product manufacturing. The projected slowed growth of manufacturing and production in the region is of particular concern for the local communities that rely on these economic niches, which are extremely diverse across the eastern and western subregions of Central Minnesota.

Recruitment Trends in Central Minnesota Distinguishing Industries

	Industry Sub-Sector	Number of Firms (as of 2014)	Location Quotient *	Related Occupation in Demand & Rank (in sub region 7W or 7E of highest demand)	Number of Jobs Advertised (Jan-Sept 2016)	Change in Job Volume since 2015
1	Furniture & Related Product Manufacturing	108	2.9	Cabinetmakers & Bench Carpenters (#15, 7E)	31	-18%
2	Animal Production & Aquaculture	166	2.7	Meat, Poultry, and Fish Cutters and Trimmers (#38, 7W)	18	+200%
3	Transportation Equipment Manufacturing	31	2.6	Laborers & Freight, Stock, & Material Movers (#29, 7W)	654	+40%
4	Beverage & Tobacco Product Manufacturing	12	2.3	Packers & Packagers, Hand (#26, 7W)	66	+7%
5	Paper Manufacturing	11	2.3	Printing Press Operators (#51, 7E)	84	+25%
6	Nonmetallic Mineral Product Manufacturing	68	2.2	Extruding & Drawing Machine Setters, Operators, and Tenders, Metal & Plastic (#50, 7E)	10	-23%
7	Electric Power Generation, Transmission & Dist.	40	2.2	Industrial Engineers (#55, 7E)	393	-7%
8	Heavy & Civil Engineering Construction	202	2.0	First-Line Supervisors of Construction Trades and Extraction Workers (#33, 7E)	207	-11%
9	Textile Product Mills	25	1.9	Maintenance & Repair Workers, General (#16, 7E)	666	+2%
10	Plastics & Rubber Products Manufacturing	61	1.9	Cutting, Punching & Press Machine Setters, Operators, & Tenders, Metal & Plastic (#42, 7E)	53	-42%
	Central Region, All Industries	17,038	1.0		71,217	+22%

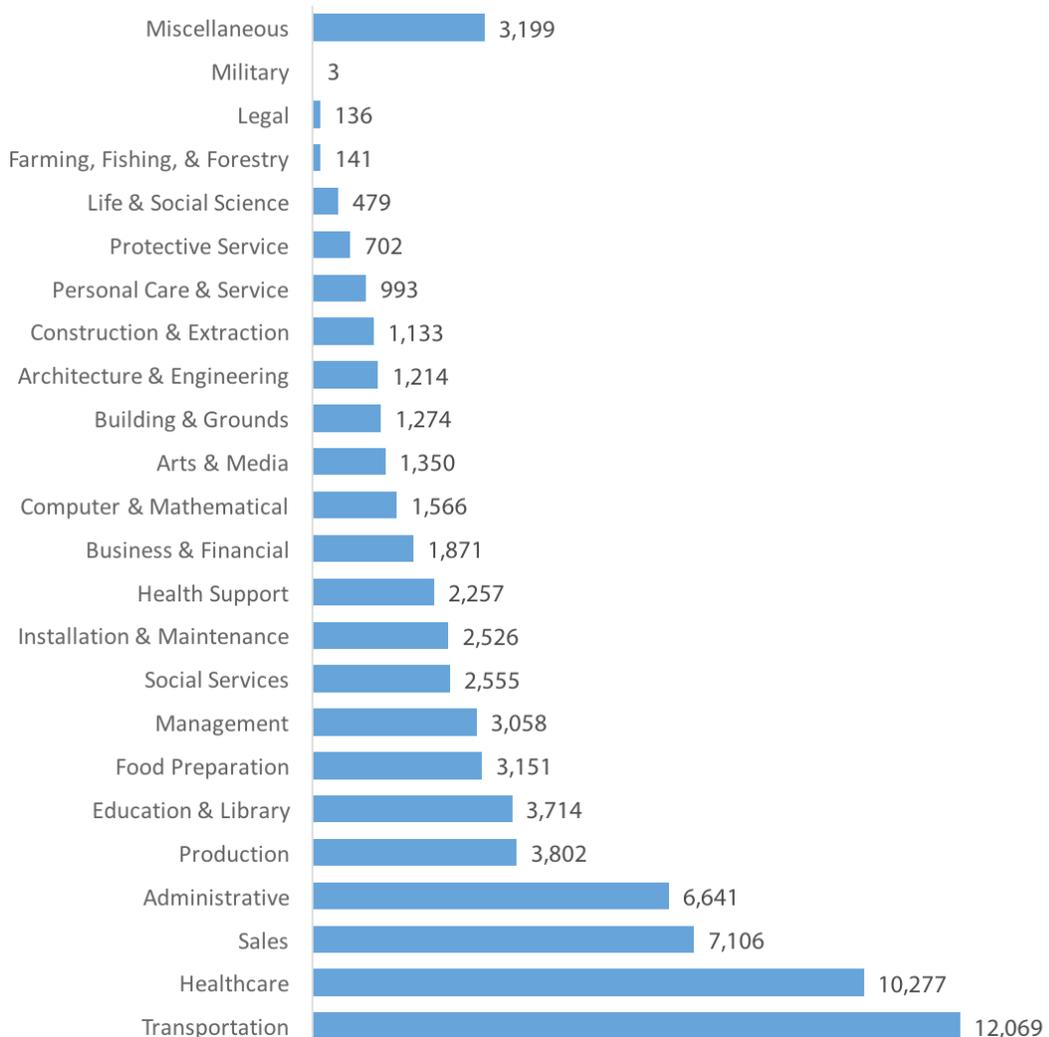
*Location Quotient quantifies how concentrated an industry is in a region compared to the state. LQ = 1.0 proportion of total jobs is equal to statewide proportion. Sources: DEED Occupational Employment Statistics, Qtr 1 2016. DEED Occupational Employment Outlook 2012-2022. DEED Quarterly Census of Employment & Wages.

Central Occupation Trends

January - September 2016

Transportation services are in high demand in Central Minnesota, accounting for 17% of all jobs advertised online to date in 2016. Healthcare positions are the second most sought, with 14% of all postings pertaining to this sector. When health support occupations are included (3.2% of the postings), the total healthcare function positions lead as the most-sought positions in the region. These types of jobs are typically advertised online whenever openings are available, and counts are a relatively strong representation of regional labor needs. However, a number of critical industries continue to post job openings in very low volumes and may under count actual need. Some of these industries include forestry and logging, paper manufacturing, electric power generation and transmission, and mining. Highly unionized industries and temporary or seasonal positions are also not advertised online in large volumes, and other data sources might capture the true number of vacancies better.

Job Posting Volume by Occupation



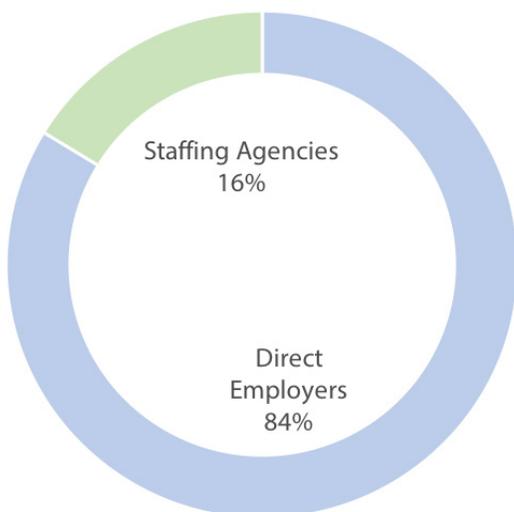
Central Employer Trends

January 2016 - September 2016

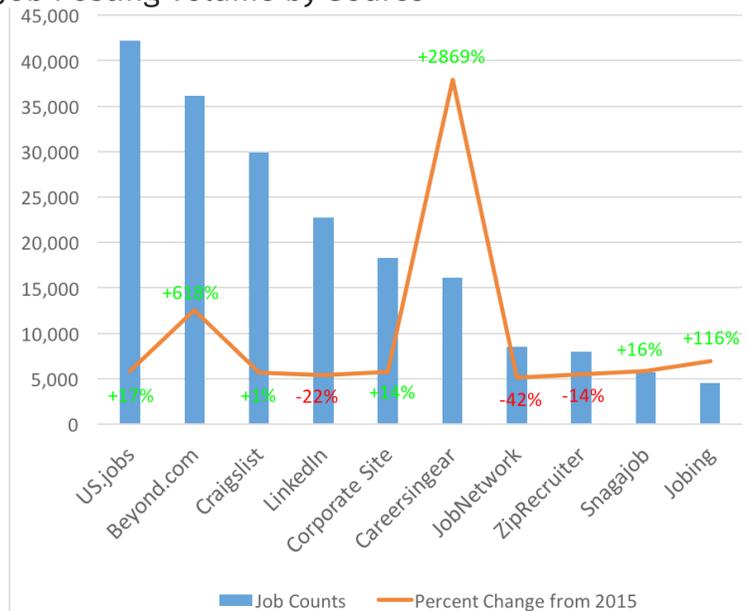
Central Minnesota has a number of job boards that have high traffic of local employers, though none of them ranked in the top 10 sites with the greatest volume of jobs. Craigslist ranked third among several popular job aggregators including Beyond.com, CareersinGear, the JobNetwork, and ZipRecruiter.

Top employers Centracare and Celadon have increased their recruitment in the region dramatically since 2015. Centracare advertised multiple positions for medical professionals, ambulatory application specialists, and storeroom clerks, while the vast majority of positions with Celadon were for truck drivers and require a Class A CDL license.

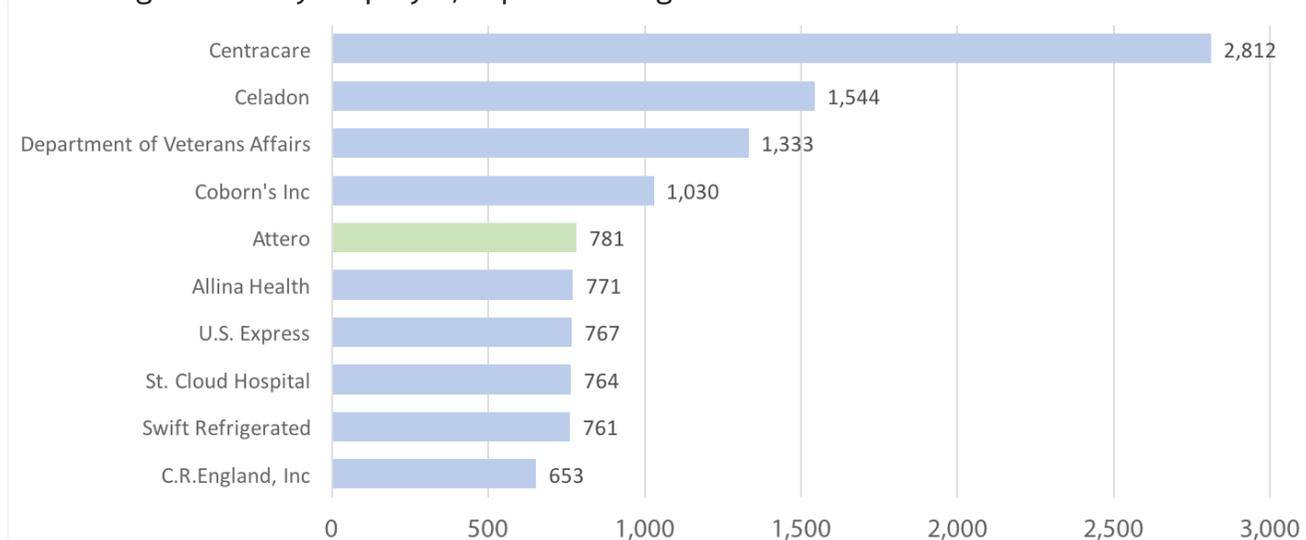
Share of Jobs by Direct Employers



Job Posting Volume by Source



Job Posting Volume by Employer, Top Ten Hiring

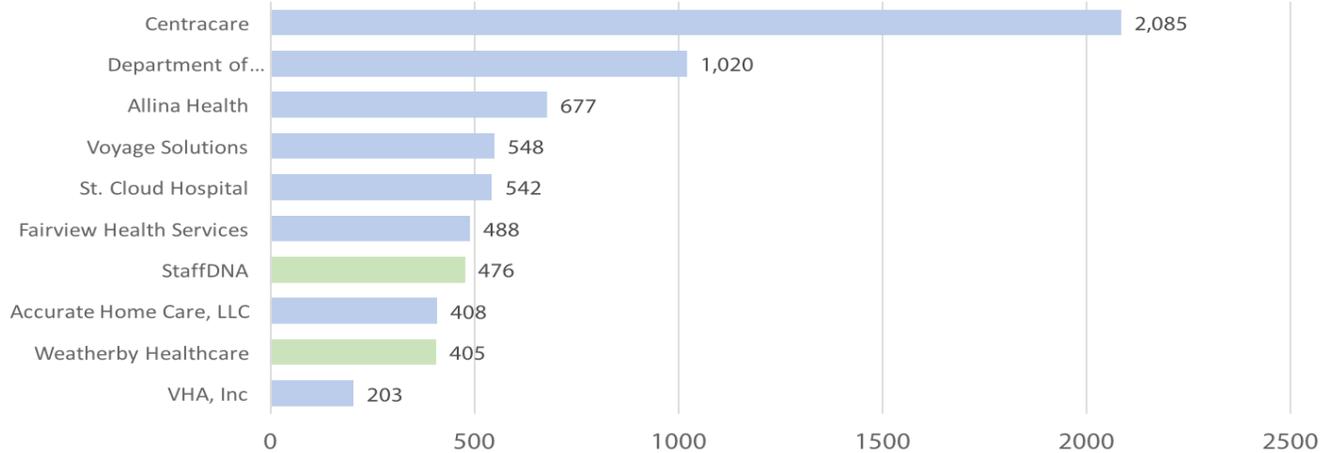


Top Central Employers Hiring by Job Function

Medical & Health
(14,801 job postings +19%)

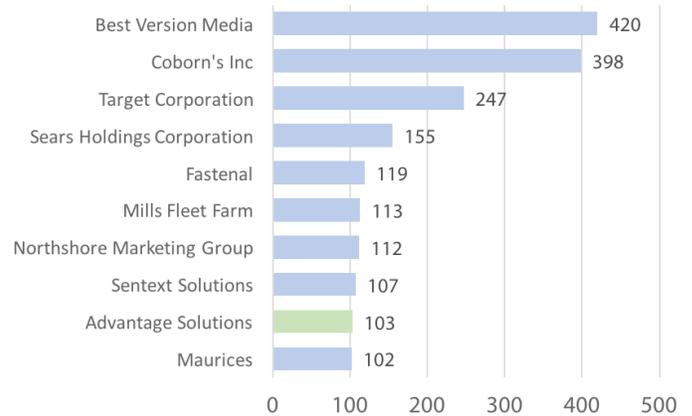
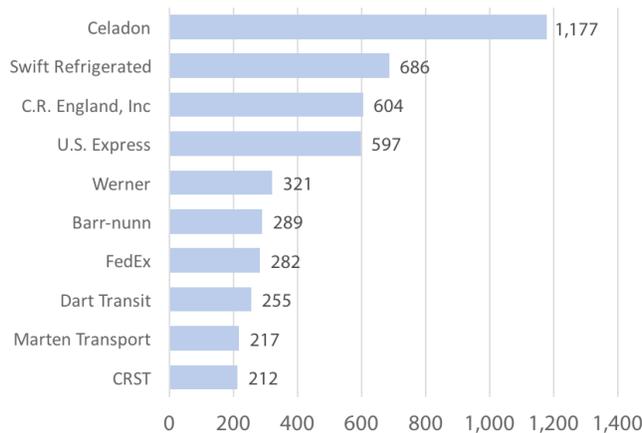
January 2016 - September 2016

*Note: does not include agriculture



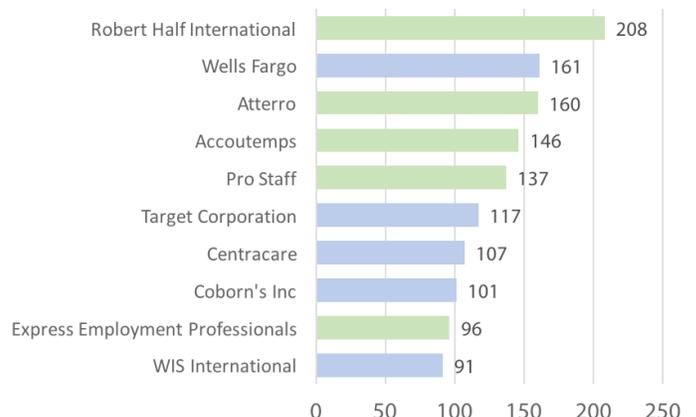
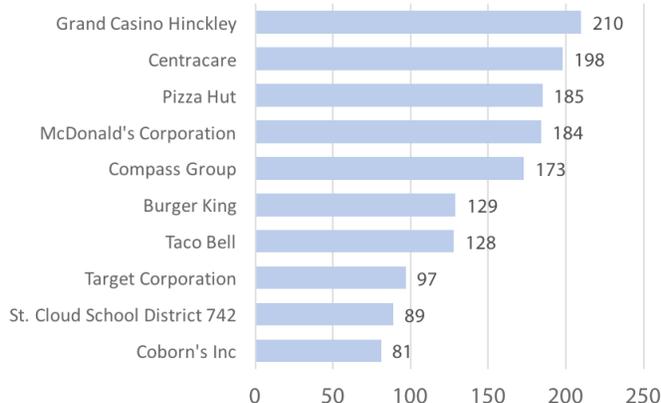
Operations & Logistics
(12,308 job postings +167%)

Business Development & Sales
(8,218 job postings +0.2%)



Hospitality & Services
(5,245 job postings +16%)

Administrative & Clerical
(4,600 job postings +7%)



Major Cities of Central Minnesota

Saint Cloud has a dramatically high concentration of jobs currently available with over two city residents per every job available online. Increasing by almost 16% since 2015, there were many times more jobs available in Saint Cloud in the first three quarters of 2016 than there were unemployed residents. It is possible that some of the jobs listed in Saint Cloud are actually located in smaller surrounding communities, but have posted with Saint Cloud's name to attract more applicants. Willmar, Elk River, Cambridge, and Hutchinson saw moderate declines in online job posting volume since 2015; but, the other six largest cities in the region saw increases in online posts from 12% (Monticello) up to 43% (Sauk Rapids). This may point to growing local economies or the increasing difficulty of finding local candidates, as over 40% of Central Minnesota's population commutes outside of the region for work.

Population and Job Volume

	City	Population (2014)	Labor Force Participation Rate, 16+ (2014)	Job Postings (Jan - Sept 2016)	People per Job Opening (Annual)	Workers per Job Opening (Annual)
1	Saint Cloud	53,479	69.4%	19,492	2.1	1.5
2	Elk River	23,963	74.5%	2,858	6.3	3.4
3	Willmar	19,638	68.5%	3,636	4.1	2.2
4	Buffalo	16,026	70.9%	2,197	5.5	2.8
5	Hutchinson	13,913	66.9%	2,133	4.9	2.6
6	Sauk Rapids	13,424	73.7%	2,154	4.7	2.5
7	Monticello	13,299	78.1%	2,529	3.9	2.2
8	Big Lake	10,368	78.4%	973	8.0	4.4
9	Cambridge	8,451	64.1%	2,031	3.1	1.5
10	Waite Park	7,517	69.6%	1,814	3.1	1.7
	Central Region	693,108		71,217	7.3	



Excludes Craigslist ads. People per job is the ratio of total all-ages population to number of jobs advertised locally (annualized). Population counts are from the US Census Bureau's 2014 Population Estimates program, and labor force participation rate from the US Census Bureau's American Community Survey 5-Year Estimates, 2014.

Data Sources

The principal data source used in this report is TalentNeuron Recruit (formerly Wanted Analytics), a real-time labor market data source by CEB that spiders to online job postings to provide current data on position openings and recent trends. It pulls data from over 25,000 unique online job boards and corporate sites in North America alone. It can be accessed at www.wantedanalytics.com.

Postings by staffing agencies are included alongside direct employers, unless otherwise stated, and posts have been deduplicated for all analyses except for the chart indicating online job posting sites used by employers. Heavily-unionized sectors and any type of position that has a lower rate of posting job vacancies online will be under-represented by TalentNeuron Recruit Data. Some occupation types, like transportation, shipping, and logistics, typically have more job postings than actual positions as a result of recruitment strategies. All data used in this report was pulled on September 30th and October 3, 2016. Differences in results downloaded at an earlier or later date are due to changes in access to online postings, improved deduplication of postings, or other data quality improvements. Results depend on the posting practices of employers, and simply indicate that a vacancy was posted - not that a position was filled.

Functions are defined by TalentNeuron Recruit and cross traditional occupation and industry silos. Industries are classified by 2-digit NAICS, and occupations are classified by 2-digit SOC, which can be accessed at http://www.bls.gov/soc/major_groups.htm. Calculation of candidates per job opening takes into account the total employable workforce available for all job positions that were open as of September 22-October 3, 2016, utilizing the labor force estimates provided by the Occupational Employment Survey (OES) and the Bureau of Labor Statistics (BLS) and TalentNeuron Recruit's database, factoring in Monthly Employment Rates and location. As such, "candidates" includes individuals who may not be actively seeking employment.

Top employers by job function separate advertised jobs into the primary function area of the new employee sought. It focuses on job activities as opposed to business classification. This approach was chosen as when companies are classified by standard industry codes (NAICS) they may not include all companies that participate in multiple industries or employ people in occupations that cross into those industries.

DEED's Quarterly Workforce Indicators, Job Vacancy Survey, Occupations in Demand, Local Area Unemployment Statistics, and Distinguishing Industries can be found at www.mn.gov/deed/data. Population estimates are from the U.S. Census Bureau and include people of all ages (2014).

