CHAPTER 2

ROCOG Area Profile

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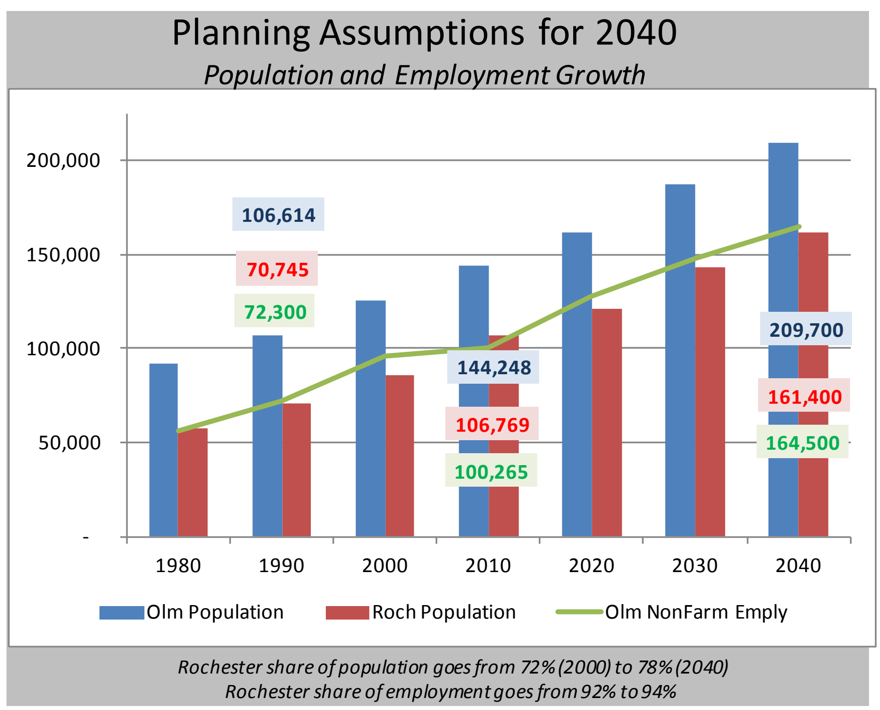
Overview / Summary

Chapter 2 provides a summary of key demographic and economic conditions within the ROCOG Planning Area that influence the underlying planning assumptions utilized in development of the Long Range Transportation Plan. Included is a review of historical trends in population and employment as well important regional economic characteristics which affect travel in the region.

Figure 2-1: Population and Employment Forecast Summary



As illustrated in Figure 2-1, population of the planning area is anticipated to grow from 144,000 in 2010 to 210,000 by 2040, with employment projected to grow from 102,000 to 165,000. These represent increases of about 15,000 in terms of population and 6,000 in terms of employment when compared to the 2010 Plan update, reflecting the anticipated influence of the Destination Medical Center economic development initiative. Regional commuters play a significant role in meeting labor force needs in Rochester, with approximately 40% of local jobs currently filled by workers from outside the city of Rochester. Moving those persons in and out of the metro area is one of the significant transportation issue to address. Similarly, an outsize share of regional retail sales also occurs in Rochester given its role as the regional economic center for Southeast Minnesota, which also contributes to increased travel demand in the metro area.

The Rochester area is also seeing changes in household composition similar to those throughout the United States, with significant increases in single person households expected over the planning period and limited growth in traditional family households with children. An ever growing number of single person households will be composed or persons over 65 years of age, with increases in the number of disabled and/or lower income common in this age group adding to demand for specialized transportation services.

Transportation investment is important to the economic success of the community. It is critical that transportation plans are coordinated with economic and community development efforts. Through its integration with a joint city/county planning agency, ROCOG is involved in ongoing public and private planning projects which help to create a two-way flow of information between transportation planning and other community planning efforts. These ongoing cooperation efforts are described in detail in Appendix G.

With staffing integrated as part of a multi-purpose community planning agency, ROCOG staff in particular and its committees in general also benefit from ongoing interaction with resource and environmental agencies. As a result, ROCOG has built an extensive library of data on natural and cultural resources, which is summarized in Appendix H, used to inform the MPO's transportation planning efforts. Integration of the community's planning functions in a single agency also helps to foster discussion between the MPO and various resource agencies, facilitating a two-way flow of information between transportation planners and environmental resource staff that has helped to develop a number of initiatives addressing the impact of transportation facilities on the environment. Ongoing consultation efforts are described in Appendix D and summaries of projects involving environmental mitigation activities are discussed in Chapter 14 as well as Appendix E.

Introduction

Olmsted County has continued to see strong population growth in the first decade of the 21st Century, with an 18% rate of growth between 2000 and 2013 as compared to a statewide growth rate of 10%. Olmsted County's growth compares favorably with past decades, where population grew 16.7% in the 1990's and 15.7% in the 1980's.

The City of Rochester is the main population center in Olmsted County, with approximately 74% of the countywide population located in Rochester. Rochester has experienced a 24% increase in population between 2000 and 2010, slightly higher than its growth rate in the 1990's (21.7%) and 1980's (22.1%), but still one of the stronger municipal growth rates in the state. Rochester is the 3rd largest city in the State of Minnesota after Minneapolis and St. Paul, with an estimated 2013 population of 110,393.

The economy is built around health care, high technology and agriculture. Major employers include the Mayo Medical Center, IBM-Rochester and Seneca Foods. The Mayo Clinic and IBM combined employ approximately 40,000 people in a workforce of approximately 103,000 persons. A new University of Minnesota – Rochester branch was established in 2007 and expects to have a student population of 5,000 by the Year 2025.

For over 140 years, the city of Rochester has remained the regional center for industry and commerce in southeastern Minnesota and northeastern Iowa. Olmsted County draws a significant number of workers from surrounding counties, with approximately 22% of persons who work in Olmsted County commuting from residences outside of Olmsted County.

Olmsted County and the City of Rochester is an important regional retail center, accounting for over 50% of sales in the seven county area centered on Rochester. A large proportion of County retailing activity occurs in the City of Rochester, which accounts for approximately 88% of the retail sales in the county.

The high level of job growth in the county, combined with short commuting times to jobs in Rochester and local economic development initiatives, has resulted in historically high levels of new housing starts in small cities near Rochester. Byron, Stewartville and Pine Island all experienced record levels of housing permit issuance prior to the Great Recession and have recovered to similar levels since 2012. These communities will continue to offer attractive options for households due to a convenient commuting distance to the Rochester job market and good schools and attractive quality of life for those desiring to live in a smaller community.

Population

Table 2-1[i] summarizes the change in the geographic population distribution that has occurred since 1980 in Olmsted County. The largest share of population growth has occurred in the City of Rochester, with small cities seeing about 1/6th of countywide growth since the Year 2000. Due to significant annexation activity, suburban townships saw a 20% decline in population since 2000. Detailed jurisdictional level trendline information is available in Appendix F.

Table 2-1: Population Trends 1980-2013

Jurisdictional Group	Population					Share of Growth		
	1980 Census	1990 Census	2000 Census	2010 Census	2013 (SDC est.)	1980's	1990's	2000's
Small Cities	8,674	10,529	13,131	16,751	17,439	13%	14%	20%
Rochester	57,890	70,745	85,806	106,769	110,393	88%	79%	113%
Suburban Townships	15,121	14,944	15,660	11,812	12,157	-1%	4%	-21%
Exurban Townships	4,027	4,640	4,865	4,292	4,402	4%	1%	-3%
Rural Townships	6,294	5,756	6,278	4,624	4,798	-4%	3%	-9%
Olmsted County	92,006	106,614	125,740	144,248	149,189			

Population Projections

Table 2-2 summarizes population projections prepared by ROCOG[ii] for selected years through 2040. Olmsted County is projected to reach a population of 215,800, driven by the expectation of continued strong employment growth and expected increases in energy and housing costs that will lead more persons to locate closer to their place of work. Significant strategic economic development efforts including the Destination Medical Center and Journey to Growth, a local business initiative to broaden the economic base, will provide support for growth.

Table 2-2: ROCOG Population Projections

Jurisdiction	2010	2020	2030	2040	2010-2040 Growth		Share of Growth
Cities							
Rochester	106,769	125,776	148,046	164,633	57,864	54.2%	81%
Byron	4,914	6,064	7,270	8,851	3,937	80.1%	5%
Chatfield (Olm)	1,206	1,435	1,711	1,921	715	59.3%	1%
Dover (city)	735	897	1,099	1,274	539	73.3%	1%
Eyota (city)	1,977	2,258	2,582	2,849	872	44.1%	1%
Oronoco (city)	1,300	1,711	2,244	2,612	1,312	100.9%	2%
Pine Island (Olm)	703	1,139	1,637	2,040	1,337	190.2%	2%
Stewartville	5,916	6,896	8,030	9,067	3,151	53.3%	4%
Municipal Totals	**123,520**	**146,175**	**172,619**	**193,247**	**69,727**	**56.4%**	**97%**
Suburban Townships	11,812	12,428	13,360	13,988	2,176	18.4%	3%
Exurban Townships	4,292	4,338	4,444	4,361	69	1.6%	0%
Rural Townships	4,624	4,553	4,475	4,274	(350)	(7.6%)	0%

Township totals	20,728	21,318	22,279	22,623	1,895	9.1%	3%
Olmsted County	144,248	167,494	194,898	215,870	71,622		

The majority of population growth is expected to occur in the City of Rochester (81% of total ROCOG area population growth), while Byron, Stewartville and Pine Island are also expected to see significant increases relative to their existing size. Table 2-3 shows the added growth expected in the cities of Chatfield and Pine Island which would occur outside of Olmsted County but would be considered to be part of the base population of the ROCOG Planning Area

Table 2-3: Population Projections in ROCOG Border Cities

Jurisdiction	2010	2020	2030	2040	2010-2040 Growth	
Pine Island (Goodhue Co)	2,560	2,760	2,980	3,190	630	24.6%
Chatfield (Fillmore Co)	1,573	1,600	1,670	1,740	167	10.6%
Pine Island (Olmsted + Goodhue)	3,263	3,899	4,617	5,230	1,967	60.3%
Chatfield (Olmsted + Fillmore)	2,779	3,035	3,381	3,661	882	31.7%
Total Olmsted + Border cities	**148,381**	**171,854**	**199,548**	**220,800**	72,419	48.8%

Future population projections individual townships are included in Appendix F. Similar to the historic patterns, rural townships are generally expected to see a small decline in population, largely due to the aging of their population base, while suburban and exurban townships are projected to see some increase in resident population through 2040.

Population Issues

Figures 2-2 and 2-3[iii] highlight distribution of population by age cohort based on Year 2010 Census data and ROCOG's 2040 projections. These population pyramids highlight the expected changes resulting from the aging of the post-WWII baby boom, with the numbers of persons over the age of 60 increasing significantly in the next 25-30 years. This carries potentially significant implications in terms of transportation needs, since persons in older age cohorts will typically create a higher demand for different types of transit services. For example, as reported in the Year 2013 American Community Survey, approximately 28.5% of the 65+ population in Olmsted County had at least one disability. If this proportion stays constant, the population over 65 with at least one disability will grow from 5,100 in the Year 2013 to 16,800 over the time horizon of this plan. This anticipated increase in the numbers of persons with a disability also highlights the need to insure that ADA compatible transportation facilities, including not only transit vehicles but infrastructure including sidewalks and trails, need to be designed (for new construction) or planned for upgrading (for existing facilities) to meet ADA requirements.

Research studies sponsored by US Department of Transportation and others have also suggested that among the impacts this change will create are a need to consider items such as larger signage, brighter pavement markings, along with higher cost items such as possible adjustments in design, to respond to physical capabilities (or limitations) of this growing group of users. While costs of items such as signs, pavement marking or lighting are relatively minor when considering a single location, if considered on a network-wide basis they represent a significant level of investment. Maintaining these elements of the roadway infrastructure already present a funding challenge, and adjusting to respond to the needs of a growing level of older drivers will only raise the level of importance of the issue in the future.

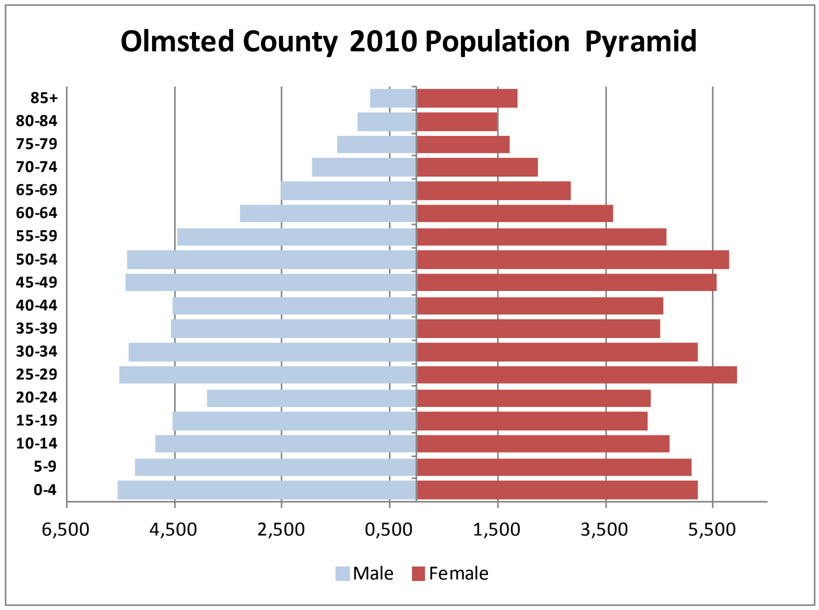


Figure 2-2:

2010 Population Distribution by Age Cohort and Gender

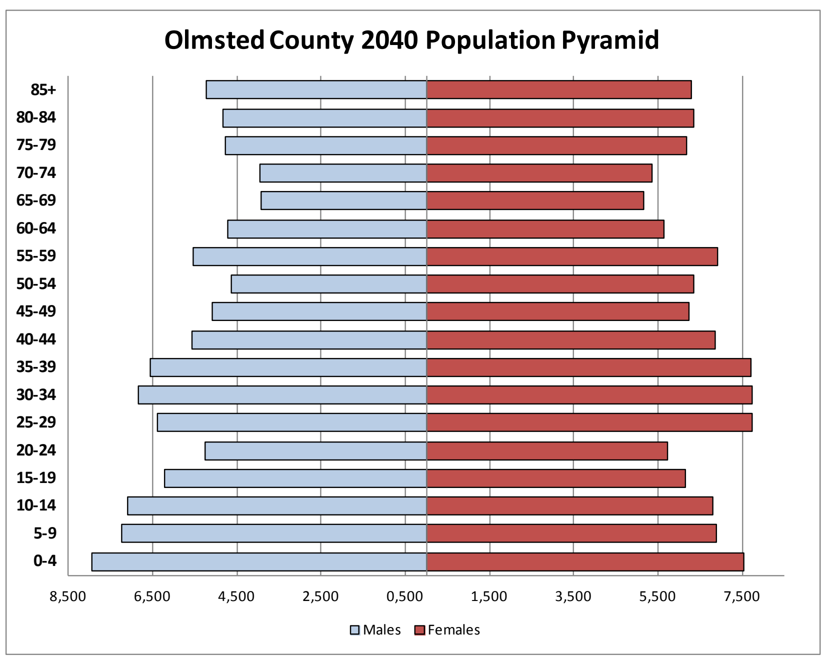


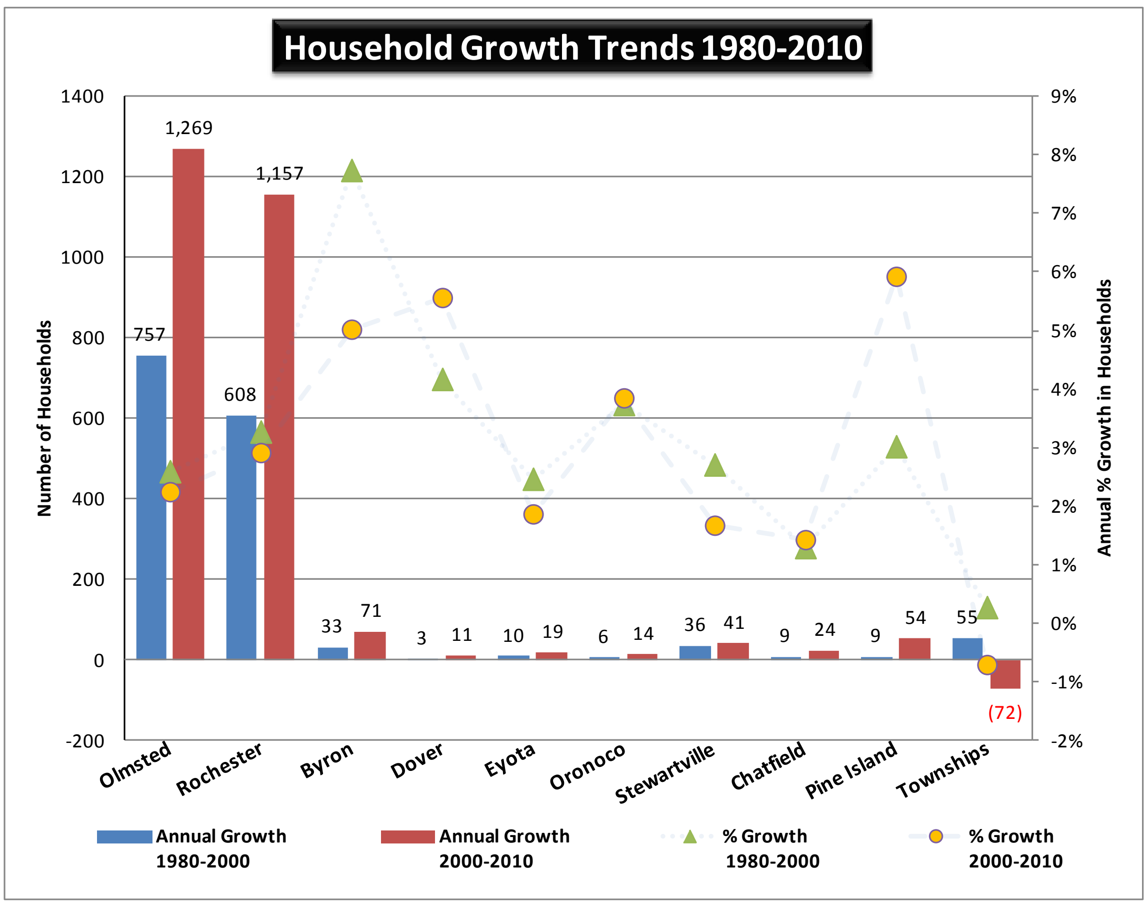
Figure 2-3:

2040 Projected Population Distribution by Age Cohort and Gender

Households

Figure 2-4[iv] highlights information on household growth trends for jurisdictions in the ROCOG Planning Area for the period 1980 through 2010. The figures indicate that the rate of growth in the number of households in the last ten years was much stronger than the period of 1980 through 2000 in all the municipal jurisdictions, while the rate of growth in township areas has declined. This rate of growth has exceeded the population growth rate, resulting from a decline in household sizes and the changes in the composition and distribution of household by type. Given the strong relationship between households/housing units and trip generation, this pace of growth, if continued, has significant implications for future travel demand in the ROCOG area. Further jurisdictional level information is available in Appendix F of the Plan.

Figure 2-4: Household Trends



In relation to rural travel, it is interesting to note that while the majority of the townships (14 of 18) lost population in the period of 2000 to 2008, only four townships saw a reduction in the number of households, and the overall rate of household loss was only 1/3rd the rate of population loss.

Household Composition

Table 2-4[v] summarizes projected changes anticipated through the Year 2035 among different types of households. Relative to the overall 35% growth in total population expected to occur between 2010 and 2035, the number of married couple households with children is only expected to increase by 7% while married couple households without children is projected to rise by 57%. Since households with children typically have the highest trip generation rates of all housing units, it suggests that that the aggregate level of traffic as measured at a household level may decline in the future.

There is a significant increase in single person households projected, both in the 65+ age group as well as among younger individuals. The significant rise in the proportion and number of single person households in the 65+ age group may have implications for the level of community-based transit service that will be needed in the future. These cohorts may also spur greater interest in walkable neighborhoods or mixed development areas, with greater demand for higher density, mixed use housing opportunities, including increased demand for downtown housing in particular. The Rochester Downtown Master Plan (2011) and the draft Destination Medical Center Plan (2015) both suggest a 100% to 200% increase in population in downtown Rochester as a result of increased growth in populations with an interest in downtown living.

Table 2-4: Projected Change in Composition of Households 2010-2035

Household Type	2000*	2010	Change 2000 to 2010	2020	2030	2035	2010 - 2035	Share of Growth
	Census	Census		SDC Prj	SDC Prj	SDC Prj	% Change	%
Married Couples with Children	13,365	13,287	(78)	13,890	14,130	14,160	7%	4%
Other Families with Children	3,444	4,586	1,142	5,190	5,430	5,520	20%	4%
Married Couples w/o Children	13,728	17,258	3,530	22,610	25,910	27,120	57%	46%
Nonfamily Households, Living Alone	12,358	15,524	3,166	19,460	22,760	24,510	58%	42%
Living Alone, 65+	3,656	4,730	1,074	6,540	9,730	11,140	136%	30%
Other Nonfamily Households	3,141	3,863	722	4,050	4,230	4,340	12%	2%
TOTAL HOUSEHOLDS	47,807	57,080	9,273	67,360	74,950	78,320	37%	
Householders ages 15 to 24	3,076	2,726	(350)	3,780	4,350	4,520	66%	8%
Householders ages 25 to 44	21,267	21,063	(204)	23,430	23,470	23,420	11%	11%
Householders ages 45 to 64	15,012	22,036	7,024	25,000	24,570	25,160	14%	15%
Householders age 65 & older	8,539	11,255	2,716	15,150	22,560	25,230	124%	66%

Employment

Figure 2-5[vi] illustrates that wage & salary employment growth in Olmsted County has remained generally on a steady upward path for the last 30+ years. Periods of significant growth were seen in the late 1980's and again in the late 1990's. The Great Recession (2008-2010) saw an absolute decline in the number of jobs in Olmsted County for three consecutive years, but the economy has largely recovered the 6,000+ jobs lost during that period heading into 2015.

Total private non-farm employment reported for the 4th Quarter of 2013 by the Bureau of Economic Analysis placed Olmsted County employment at 104,200 jobs, which exceeds the pre-recession levels of 2007, when average annual employment private was at 102,140 jobs.

Figure 2-5: Historic Employment Growth 1976-2013

(Note that the chart does not include individuals working in farming or those that are self-employed.)

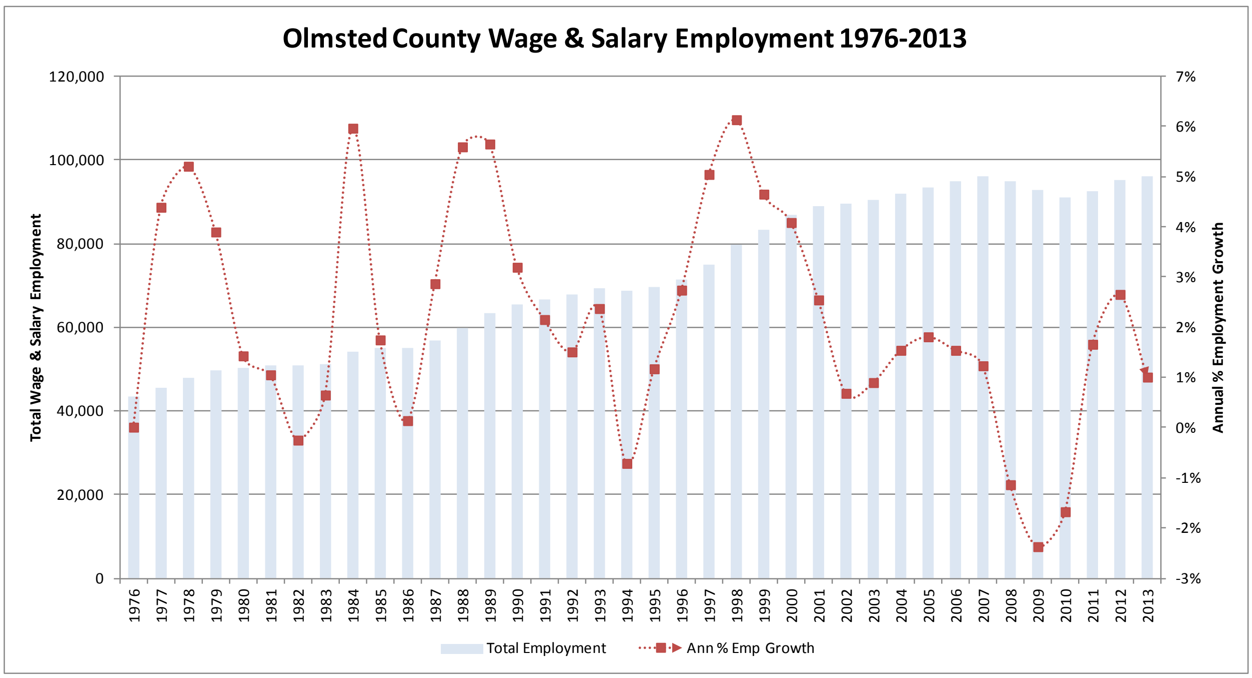


Figure 2-6[vii] illustrates how the change in employment locally has generally mirrored the pattern of growth in the national economy (as measured by the annual change in GNP) fairly closely throughout the last 40 years. This pattern is to be expected to the degree that major employment sectors in the local economy (health care / information technology / education) mirror major generators of economic activity at the national level. This relationship in large measure influences estimates of future employment growth prospects for the planning area.

Figure 2-6: Relationship of Employment Change & National Economy

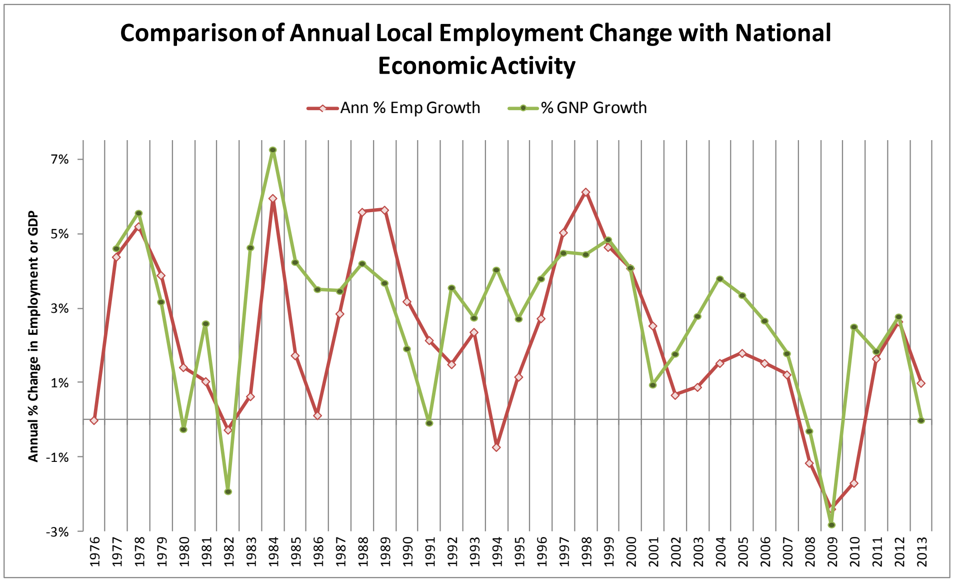


Figure 2-7 and Table 2-5[viii] summarize employment projections prepared by ROCOG for the Year 2040 by major economic sector in Olmsted County. The Health Services industry, anchored by the Mayo Medical Center and an emerging biosciences industry, is anticipated to see significant growth, along with lower levels of growth in keeping with population trends in the retailing and service sectors. A trend towards more self-employed individuals is expected to accelerate and count for a larger proportion of overall county level employment in the future.

Figure 2-7: ROCOG Employment Projections

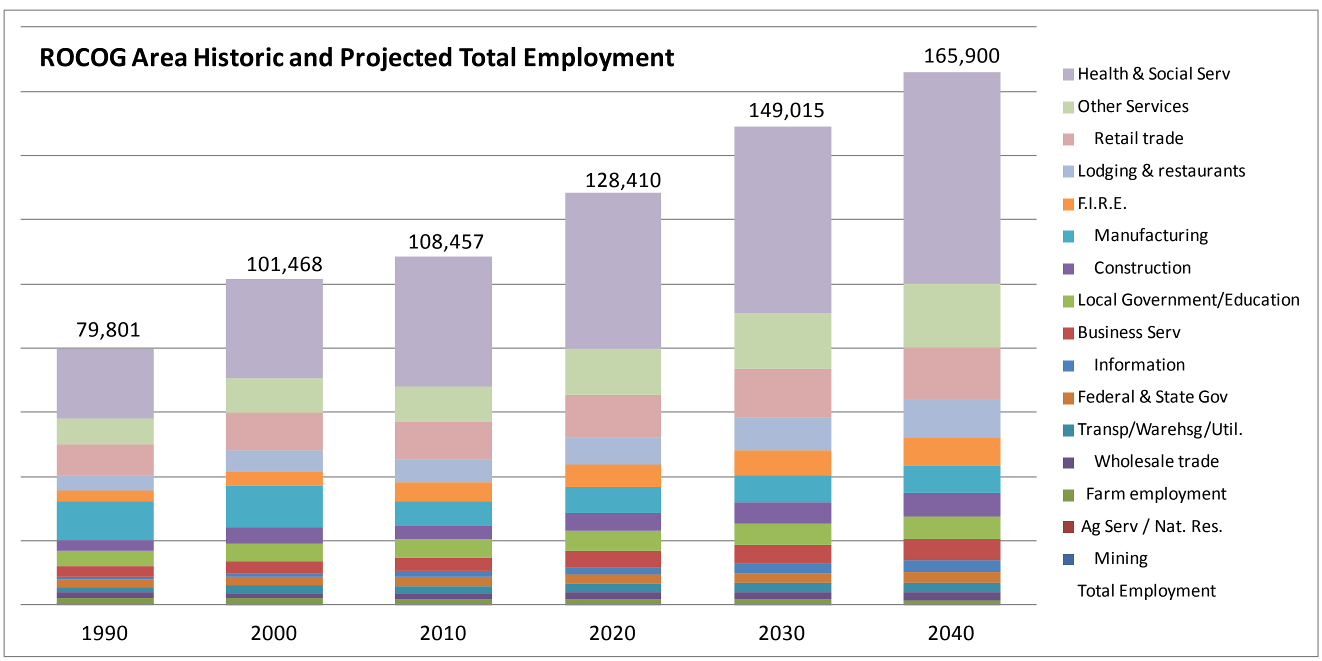


Table 2-5: ROCOG Employment Projections by Sector for 2040

Sector	1990	2000	2007	2010	2020	2030	2040
Total Employment	79,801	101,468	112,077	108,457	128,410	149,015	165,900
Health & Social Services	21,622	30,739	39,302	40,373	48,780	58,190	65,980
Other Services	8,076	10,800	12,324	11,190	14,030	17,180	19,750
Retail trade	9,750	11,850	11,664	11,613	13,400	15,100	16,160
Lodging & restaurants	4,750	6,433	7,440	6,912	8,525	10,390	11,790
F.I.R.E.	3,319	4,683	5,799	5,939	6,850	7,850	8,750
Manufacturing	12,147	12,780	9,306	7,889	8,300	8,500	8,650
Construction	3,183	5,034	5,738	4,162	5,450	6,500	7,400
Local Government/Education	4,901	5,488	5,780	5,749	6,200	6,550	6,800
Business Service	3,082	3,924	4,077	4,219	5,200	6,010	6,750
Information	800	1,050	1,708	1,632	2,275	2,850	3,550
Federal & State Gov	2,628	2,697	2,742	2,849	2,950	3,100	3,245
Transp/Warehsg/Util.	1,654	2,311	2,396	2,402	2,650	2,900	3,150
Wholesale trade	1,540	1,713	2,132	1,815	2,130	2,325	2,480
Farm employment	2,078	1,804	1,413	1,458	1,375	1,250	1,100
Ag Serv / Nat. Res.	101	101	179	196	230	250	270
Mining	100	61	77	59	65	70	75

Labor Force / Commuting

A critical transportation issue for the Rochester area economy is the sourcing of labor force to fill local jobs. The labor force for the Rochester MSA is drawn from a significant geographic area that extends well beyond the boundary of Olmsted County. It is estimated the labor market willing to consider a commute for work in the Rochester MSA is close to 150,000 people. A projected 2040 resident labor force of 106,250 (ROCOG *estimate / 2014*), assuming a multiple job holding rate of approximately 20%, suggests that on the order of 30,000 jobs would need to be filled by persons commuting into Olmsted County on a regular basis.

Commuting has been a significant factor in meeting the needs of employers in Olmsted County historically. Figure 2-8[ix] charts the growth in commuters into Olmsted County since 1970 from the six counties abutting Olmsted County. However, in the 2000's, the rate of growth in commuters slowed dramatically as illustrated in Figure 2-9. Figure 2-10[x] on the following page highlights the reach and magnitude of the Rochester labor market throughout southeastern

Minnesota. This graphic highlights the proportion of residents at the township and municipal level who were found to commute to Rochester for work in the Year 2010.

Figure 2-8: Commuters into Olmsted County

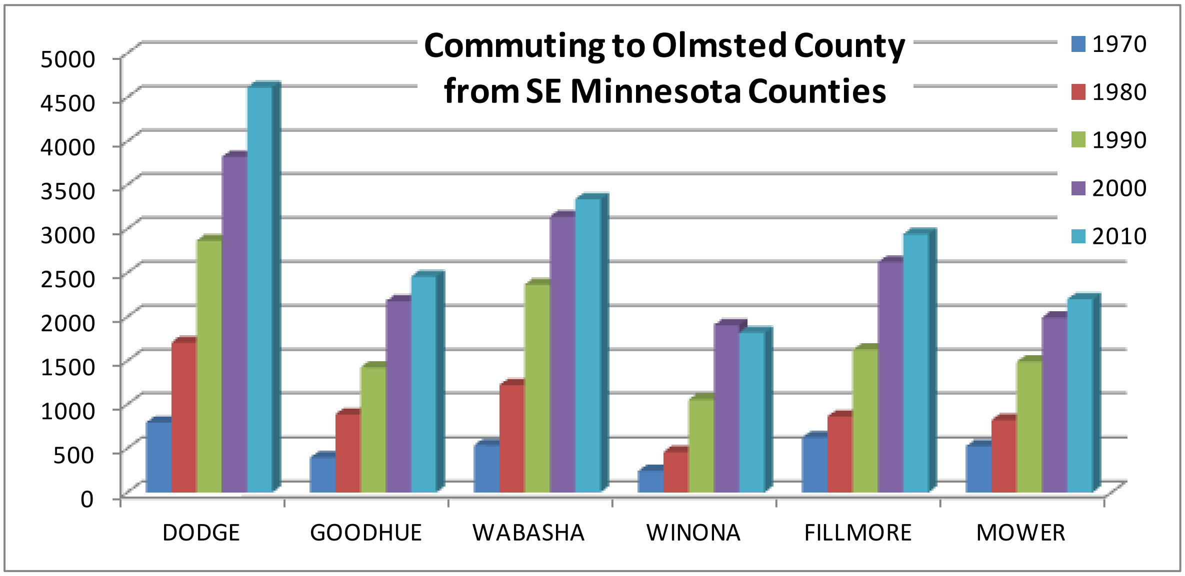


Figure 2-9: Percentage growth in commuters to Olmsted County by Decade

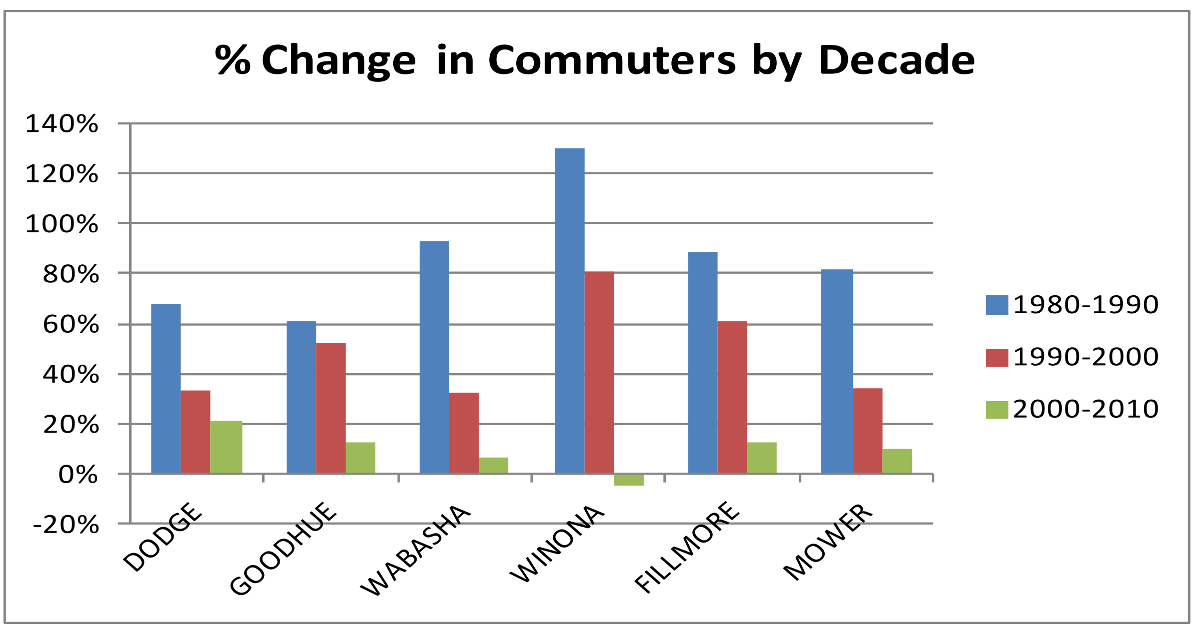
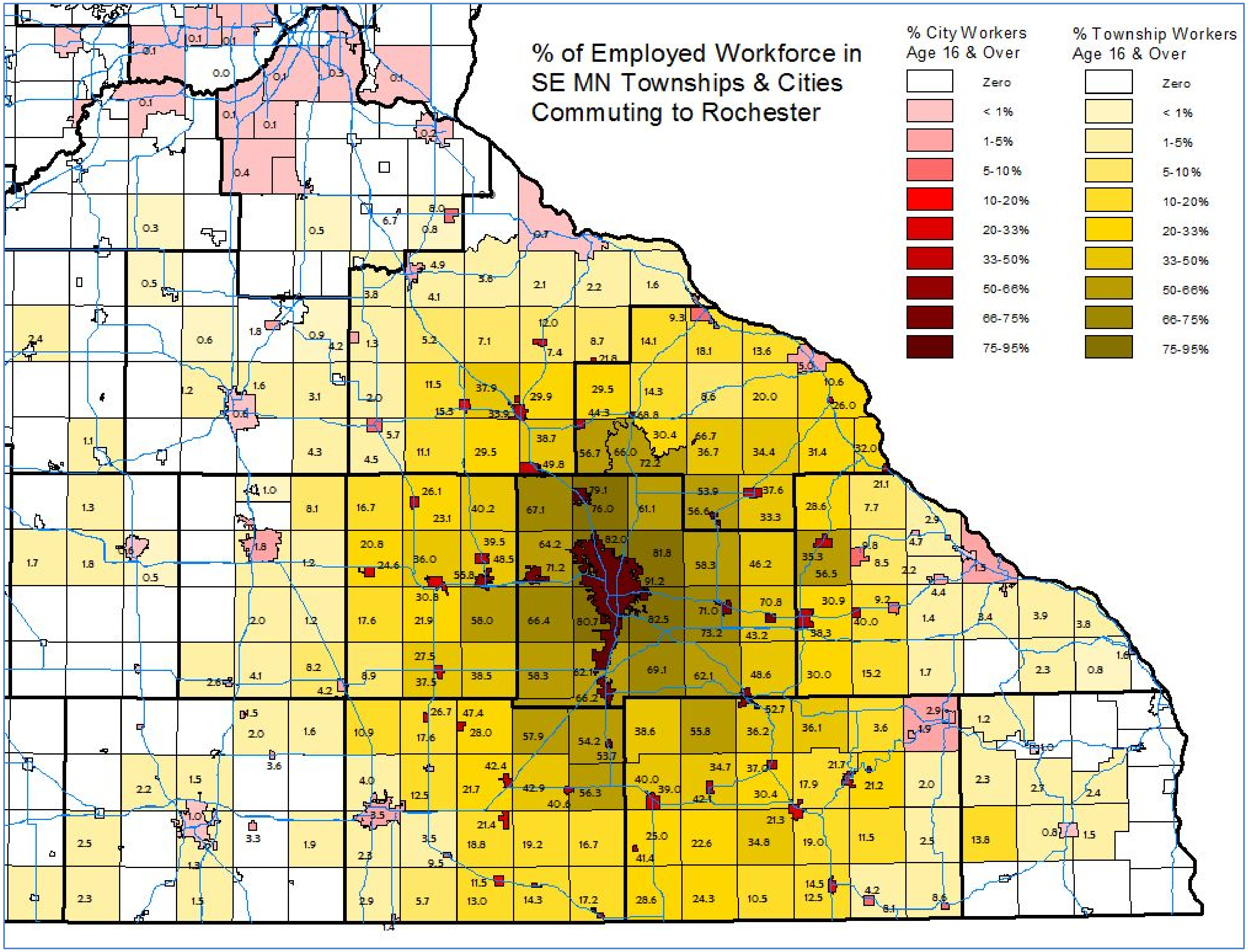


Figure 2-10: Percentage of Township and Municipal Labor Force Working in Rochester



Economy

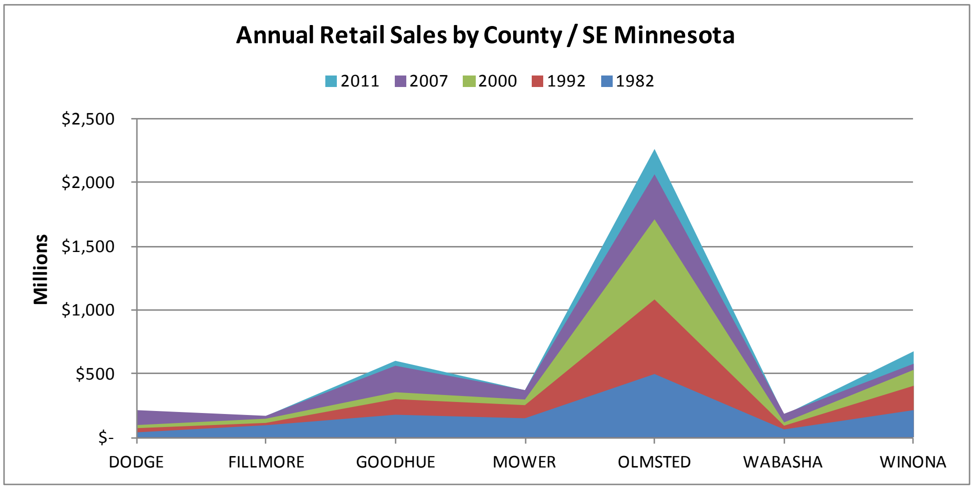
Table 2-6[xi] highlights the changes that have been occurring in the local economy by primary employment sector. The major changes involve the relative contribution of the manufacturing sector and the education / health sector to the local economy. The share of employment contributed by the education/health sector has risen by over 10% since the year 2000, while manufacturing has dropped by approximately 7%. Similarly, wages generated by the education/health sector have risen by 17%, while the manufacturing share has dropped by 10%. With the expected continued growth of health services and evolution of the University of Minnesota-Rochester campus, it is anticipated that the education/health sector share of the economy will continue to expand as a share of overall economic activity.

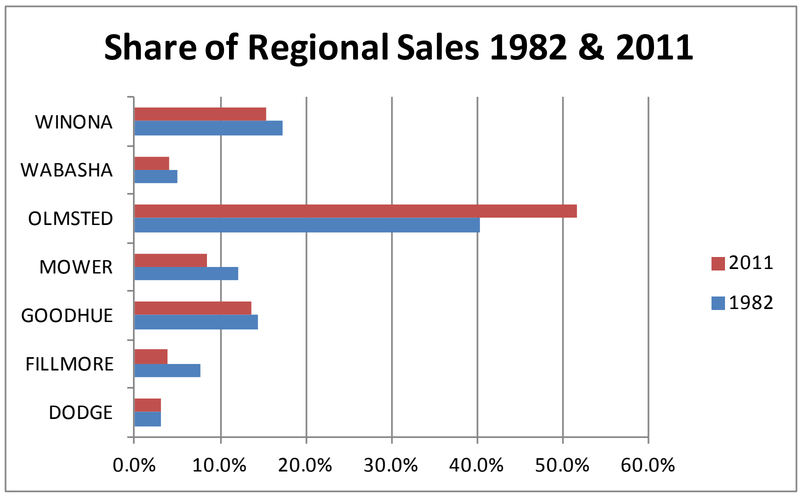
Table 2-6: Employment Sector Shares

Employment Sector	Sector Share of Employment 2000	Sector Share of Employment 2009	Sector Share of Employment 2013	Sector Share of Establish-ments 2000	Sector Share of Establish-ments 2009	Sector Share of Establish-ments 2013	Sector Share of Total Wages 2000	Sector Share of Total Wages 2009	Sector Share of Total Wages 2013
Resources and Mining	0%	0.2%	0.3%	0.9%	1.1%	1.2%	0.1%	0.1%	0.1%
Construction	5%	3.8%	2.9%	12.6%	12.9%	11.6%	5.3%	4.0%	2.7%
Manufacturing	15%	8.9%	8.1%	3.5%	3.3%	3.1%	22.1%	13.0%	12.1%
Trade	16%	15.0%	15.1%	25.8%	24.0%	24.0%	10.8%	9.0%	8.5%
Information	1%	1.5%	1.7%	1.8%	2.2%	1.6%	1.2%	1.4%	1.9%
Finance	3%	2.7%	2.3%	10.5%	10.5%	9.9%	2.7%	2.5%	2.6%
Business Services	6%	4.6%	5.4%	12.9%	12.4%	12.8%	5.6%	3.5%	4.2%
Education / Health	38%	48.3%	50.3%	8.9%	10.3%	10.7%	43.6%	58.2%	60.5%
Leisure / Hospitality	8%	9.0%	8.6%	9.9%	10.8%	11.2%	3.2%	2.8%	2.6%
Other Services	3%	2.4%	2.4%	11.7%	10.6%	11.3%	1.6%	1.2%	1.2%
Public Admin	4%	3.4%	3.1%	1.5%	2.0%	2.2%	3.9%	4.2%	3.6%

Retail Sales

Figure 2-11: Olmsted County Capture of Regional Sales Activity





An important component of the local economy is the retail sector and the role it plays in the regional economy. Figure 2-11[xii] highlights the trend in the value of total sales of retail goods in Olmsted and surrounding counties for selected years since 1982. Growth of retail sales in Olmsted County as a share of regional retailing has grown from 40% in 1982 to over 50% in 2011. Of those sales, retailers in the City of Rochester have historically captured between 85% and 90% of the total sales activity in the region. This trend implies travel demand for shopping purposes into Olmsted County and Rochester by non-residents has likely been increasing over time.

Coordination with Land Use and Economic Development Plans

ROCOG addresses federal guideline calling for "…consistency between transportation improvements and state and local planned growth and economic development patterns" through many varied planning activities. ROCOG through its affiliation with the Rochester-Olmsted Planning Department (ROPD), is involved with the development of the Olmsted County General Land Use Plan, which defines planned urban service areas and resource protection areas, and the City of Rochester Urban Service Area Land Use Plan, which defines the type and intensity of development expected to occur within the Rochester urban service area. Planning for transportation network improvements is linked to these efforts through the use of common assumptions regarding employment and population growth as well as land absorption needs to support the level of planned growth. ROCOG through the ROPD is also involved in the planning of sewer, water, open space and educational infrastructure, and capital improvement programming at the local jurisdictional level.

ROCOG directly and through the ROPD also works with organizations and businesses regarding future economic development goals and the transportation implications of economic development initiatives. Periodic updating of Campus Master Plans for businesses such as the Rochester International Airport, the Mayo Medical Center, IBM and the Rochester Area University Center provide an opportunity to work directly with these key players. The 2010 Rochester Downtown Master Plan and Mobility Plan was a major planning effort that promises to establish the character of the major activity center in Rochester for decades to come. This project in particular has set an aggressive goal for travel demand management of reducing single occupant vehicle travel to the Rochester CBD by 20% over 20 years, using multiple strategies including parking changes, enhancement of alternative modes, and a changing mix of land uses to reduce private vehicular travel. In 2014 planning for the Destination Medical Center initiative was launched, culminating in submittal of draft development plan addressing market/land use demand, transportation investment and other physical infrastructure needs to support an expected doubling of downtown employment and tripling of downtown population over the next 20-25 years. ROCOG through ROPD was directly involved in technical committee work and preparing materials for consideration by the Rochester Planning Commission and City Council.

These ongoing efforts in both service area planning and economic development visioning are described in detail in Appendix G also with an overview of the development review / approval process and ROCOG's role in that process.

Resource Plans and Inventories of Existing Resources

With staffing integrated as part of a multi-purpose community planning agency, ROCOG staff in particular and its committees in general also benefit from ongoing interaction with resource and environmental agencies. MAP-21 requires that transportation plans be compared to available state or local conservation plans, maps and inventories for purposes of assessing potential areas of impact early in the planning process. ROCOG has built an extensive database of resource mapping in GIS format in cooperation with the City of Rochester and Olmsted County that is utilized throughout the transportation planning process to inform ROCOG decisions. These datasets are described in detail in Appendix H. They include the following:

1. Surface Water Resources
    - Rivers / Streams / Lakes / Flood Control Reservoirs
    - Floodplains / Flood prone Areas
    - Shore land Areas
    - Stormwater Management System
2. Groundwater Related Resources

- Wetlands
- Seeps and Springs
- Fens
- Wellhead Protection Areas
- Decorah Edge

3. Biological Resources
   - Endangered, Threatened and Species of Special Concern
   - Rare & Native Plant Communities

4. Cultural Resources
   - Parks and Trails
   - Historic Properties
   - Archaeological Resources
   - Contaminated Sites

5. Landform Features of Importance
   - Sinkholes
   - Karst
   - Steep Slopes
   - Erodible Soils
   - Aggregate Resources

Integration of the community's planning functions in a single agency helps to foster discussion between the MPO and various resource agencies, resulting in a two-way flow of information between transportation planners and environmental resource staff that has helped to develop a number of initiatives addressing the impact of transportation facilities on the environment.

ENDNOTES

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[i] Data in Table 2-1 from American FactFinder at http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml; data for 2013 from Minnesota State Demographic Center, accesses at http://mn.gov/admin/demography/data-by-topic/population-data/our-estimates/index.jsp

[ii] Population projections prepared by ROCOG utilize are based on utilization of projections prepared by the Minnesota State Demographic Center which utilize a modified cohort survival model accounting for patterns in births, deaths and migration by five year age cohort, adjusted by ROCOG for labor force needs as reflected by labor force participation rates, percentage of jobs filled by non-resident commuters and percentage of persons holding multiple jobs to meet projected employment needs.

[iii] Figures 2-2 and 2-3 prepared by ROCOG based on data from 2010 Decennial Census, U.S. Census Bureau, and from ROCOG Employment and Population Projections, May 2014, available at http://www.co.olmsted.mn.us/yourgovernment/demographics/Documents/Employment%20and%20Demographic%20Forecasts.pdf

[iv] Figure 2-4 based on data from the Decennial Census, U.S. Census Bureau, accessed via the American FactFinder portal, at http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml

[v] Table 2-4 data from Minnesota Department of Administration, Office of Geographic and Demographic Analysis, State Demographic Center, access online via the Minnesota Governor's Council on Geographic Information at http://www.gis.state.mn.us/resource.html?Id=19282

[vi] United States Department of Labor, Bureau of Labor Statistics, Current Employment Series, available online at http://stats.bls.gov/sae/

[vii] Refer to Endnote 6 for Employment Data; GNP data from Economic Research Division, Federal Reserve Bank of St. Louis, accessed online at http://research.stlouisfed.org/fred2/series/GNP/

[viii] Table 2-5 employment projections by ROCOG based on analysis of multiple data sources including LAUS, CES, BEA, review of projections for Olmsted County from Woods * Poole, Inc., and input from local employers and industry representatives

[ix] Figure 2-8 derived from County to County Worker Flow Files, U.S. Decennial Census, available online at http://www.census.gov/population/www/socdemo/journey.html

[x] Place level commuting data from the 2006-2010 Census Transportation Planning Package, accessed using the CTPP Data Access Software at http://ctpp.transportation.org/Pages/5-Year-Data.aspx

[xi] Minnesota Department of Employment and Economic Security, Quarterly Census of Employment and Wages (QCEW), accessed online at http://mn.gov/deed/data/data-tools/qcew/index.jsp

[xii] Retail Sales data from Minnesota Department of Revenue, Minnesota Sales and Use Tax Statistics, access online at http://www.revenue.state.mn.us/research_stats/Pages/Sales-and-Use-Tax-Statistics-and-Annual-Reports.aspx