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Market Street brings original insights and clarity to the evaluation and revitalization of the places where people live, work and grow. Through honest and informed assessments, *Market Street* can equip you with the tools to create meaningful change. Our solutions successfully merge our experience and expertise with the economic and social realities of our clients. *Market Street's* community clients are successful at creating stronger programs, increasing operational budgets, and creating new quality jobs that improve the quality of life in their communities.

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INTRODUCTION

Mandan, North Dakota has grown from a rough-and-tumble outpost to a city poised to take the next step in its evolution as a local community-of-choice. To help manage and plan for the dynamics of this evolution, the Bismarck-Mandan Chamber of Commerce, the City of Mandan, Mandan Public Schools, and Mandan Parks and Recreation have partnered with *Market Street Services*, a national community and economic consulting firm based in Atlanta, to coordinate a visioning process for the city's residents, businesses and elected/appointed leadership. At the end of the months-long effort, Mandan will have a clear picture of what type of place it "wants to be" and a prioritized set of action areas to achieve this vision.

The first step in Mandan's visioning process will provide a common understanding of the community's recent trends. This *Economic and Demographic Snapshot* will use official local, state, and national statistical data sources (as available) to conclusively analyze key economic and demographic indicators including what has happened in the community in the recent past. The results of this analysis will be the basis of *Market Street's* work as the project proceeds to the four remaining stages, as outlined below:

- I. **Community Assessment.** This report will present a breadth of research to demonstrate Mandan-Morton County's competitive position to accommodate "visionary" growth and development. A combination of factors that determine a community's strengths as a place to live, work, and do business will be assessed including indicators related to education and workforce development, infrastructure and land use, business costs, and quality of life. This report helps to develop a shared understanding of Mandan's challenges and opportunities among project stakeholders.
- II. **Community Input Process:** To gather the perspectives of community members and project stakeholders several avenues will be utilized including individual interviews, focus groups, and an online survey. Information will be gathered about various aspects of Mandan's current competitiveness and quality of life, as well as information related to stakeholders' visions for its future development. Highlights from this process will be incorporated into the *Community Assessment* and will inform the *Strategic Vision Plan*.
- III. **Strategic Vision Plan.** This plan will represent the culmination of all research completed and will present action items geared toward addressing challenges and capitalizing on opportunities for visionary growth. This *Strategic Vision Plan* will serve as a tool to unify Mandan's public and private leadership behind a consensus blueprint for the community's future. The final plan will include best practices as well as benchmarks and performance measures.

IV. Implementation Guidelines. The *Vision Plan* represents “what” Mandan needs to do to achieve its preferred future, while the *Implementation Guidelines* determine “how” that will be done. This report will include a capacity assessment, a first-year action plan, a five year action plan, and will determine which organization(s) should lead plan implementation efforts.

EXECUTIVE SUMMARY

This *Snapshot* report paints a picture of Mandan and Morton County as a community moving slowly but surely towards a stronger future. While population, employment and incomes have been growing at a slower rate than the Bismarck region, these trends are nevertheless moving in a positive direction. Importantly, the Mandan-Morton labor force is becoming more educated and the local economy is well balanced and diverse enough to continue weathering a global economic slowdown.

While certain issues are of concern, they are not insurmountable. Rather, they simply provide local leaders with the opportunity to come together to work towards becoming a more competitive community in the future.

The key findings of Mandan's *Economic and Demographic Snapshot* include:

Demographics

- ✓ While Mandan and Morton County are growing, the local population is – on average – older than the region, state and nation. A double-digit drop in Mandan-Morton County's percentage of residents under age 17 indicates that the future adult workforce may have to be supplemented by workers from outside the community. However, these trends mirror those in Metro Bismarck and North Dakota.
- ✓ Mandan-Morton County is slowly becoming a more diverse community, but still is far more homogeneous than the state and nation. American Indians are the fastest growing minority group in Mandan-Morton in raw numbers, followed by Hispanics and African-Americans.
- ✓ Educational attainment for Mandan-Morton adults over age 25 trails the region, state and nation by notable amounts. Nevertheless, the percentage of local adults with two- and four-year degrees has increased in Mandan and Morton County in the first seven years of this decade. So this trend is clearly improving.
- ✓ Total poverty rates in Mandan-Morton County are declining and below state and national figures (though slightly above regional percentages). However, child poverty in Mandan-Morton is increasing, and is approaching the levels of North Dakota as a whole. Ensuring that the community's children do not grow up in poverty will be a critical concern for local leaders moving forward.

- ✓ One of the most positive trends in Mandan-Morton County is the increase in the community's average incomes. From 2000 to 2006, real per capita incomes (RPCI) in the city-county have grown by 15.7 percent, more than the region and state and triple the national rate. While RPCI in Mandan-Morton is still below all the comparison areas, its rate of increase should be commended.

Economics

- ✓ Mandan-Morton County's economy is growing, though its growth rate trails the region and state; local unemployment is also higher than Metro Bismarck and North Dakota. Mandan-Morton wage growth trails the region, state and nation. That said, however, employment in Mandan and Morton County has grown during a very difficult economic climate, so this bodes well for local prospects when the nation emerges from recession.
- ✓ In addition, the local economy is well balanced and participation of adults in the labor force is strong. Mandan-Morton County's economy is well diversified among a number of key sectors including health care, construction, manufacturing, educational services and professional and technical services. Health care – especially – has shown dynamic growth from mid-2006 to mid-2008.
- ✓ Average wages in Mandan-Morton County are also rising, both overall and for key sectors. However, these increases – as noted previously – trail the region, state and nation.
- ✓ Nearly 2,000 adults in Mandan-Morton County claim themselves as “non-employers” (i.e., sole proprietors with no employees). The majority of these non-employers work in services trades, health care and construction. Non-employer wages have been rising in Mandan-Morton, but still trail the Bismarck MSA, North Dakota and the U.S.

APPENDIX A: METHODOLOGY

This *Economic and Demographic Snapshot* provides an understanding of Mandan-Morton County's social, demographic, and economic trends compared to the Bismarck-Mandan Metropolitan Statistical Area (MSA), North Dakota, and the United States. This section describes the methodology used in the research and data analysis of the report.

GEOGRAPHY

For most indicators, Mandan-Morton County was compared to the Bismarck, North Dakota metropolitan statistical area, as defined by the U.S. Office of Management and Budget (OMB). The current definition of the Bismarck MSA includes Burleigh and Morton Counties. The geographical definition for the MSA has remained unchanged since the release of the 2000 Decennial Census.

Due to Mandan's small population size, recent reliable data is not available for many indicators. In these instances, *Market Street* has used Morton County data to gauge community trends. In 2007, the City of Mandan's population was 17,316 – or approximately 70 percent of Morton County's total population (25,926). For indicators where data for small counties is not reported either, *Market Street* calculated Morton County information by subtracting Burleigh County from the MSA estimates, which are both largely available due to their larger population sizes.

DATA SOURCES

Market Street used the most recent data available for this report. Reputable and reliable private, non-profit, local, state, and national government data sources were leveraged, with every effort made to match methodologies and units of comparison across sources to provide the most accurate and informative analysis of Mandan-Morton County's demographic and economic trends.

Major data sources for this report included the U.S. Census Bureau, the U.S. Bureau of Economic Analysis (BEA), the U.S. Bureau of Labor Statistics (BLS), and the Internal Revenue Service (IRS). State and local data sources included the City of Mandan, the Bismarck-Mandan Chamber of Commerce, and other sources.

In many cases, the data are presented in a chart as the percentage each component represents of the total. In these cases, unless otherwise noted, if the summation of the percentages of all the components does not equal 100 percent, it is due to rounding.

APPENDIX B: DEMOGRAPHIC TRENDS

This demographic profile analyzes population growth and change in terms of age distribution, racial and ethnic composition, educational attainment, poverty rates, and per capita income. Studying demographic and socioeconomic trends can help show how Mandan-Morton County’s population is changing compared to those of the Bismarck MSA, the state of North Dakota, and the U.S.

Population Change

The state of North Dakota has unique challenges related to low population densities and out-migration from rural communities, making basic service sustainability key issues in many areas of the state. In fact, North Dakota was the only state in the nation (besides Louisiana, which suffered drastic effects of Hurricanes Katrina and Rita) which has suffered population decline in the last decade. Within the state, metro area communities which offer more educational choices, occupational options and cultural and entertainment amenities are at a competitive advantage compared to smaller, more remote communities.

The City of Mandan is the state’s sixth largest community and one of only seven North Dakota cities which grew by at least 500 residents since 2000.¹ In 2007, Mandan had 17,736 residents, accounting for 68 percent of Morton County’s total population and 17 percent of the metro area’s population. Since 2000, Mandan has grown at a slower rate than the City of Bismarck and the metro area – 6.1 percent compared to 7.2 and 9.0 percent, respectively. However, local data suggest that Mandan’s population count provided by the Census Bureau may be low, because the City has added 1,453 new residential units since 2000.

Total Population Growth, 2000 - 2007

	2000	2007	Population Change	
	Population	Population	Number	Percent
City of Mandan	16,718	17,736	1,018	6.1%
City of Bismarck	55,532	59,503	3,971	7.2%
Bismarck MSA	94,719	103,242	8,523	9.0%
Burleigh County	69,416	77,316	7,900	11.4%
Morton County	25,303	25,926	623	2.5%
North Dakota	642,200	639,715	-2,485	-0.4%
United States	281,421,906	301,621,157	20,199,251	7.2%

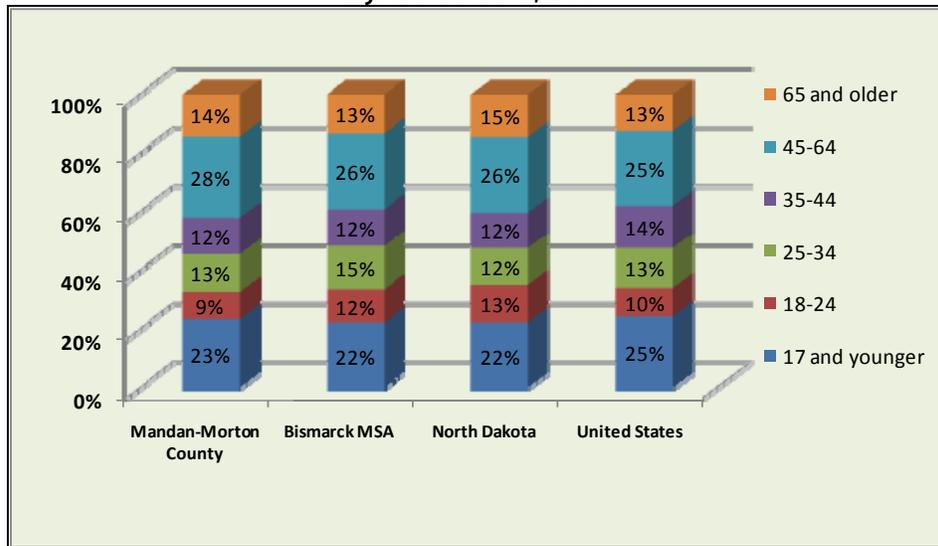
Source: U.S. Census Bureau

¹ Top five cities are: Fargo (92,660), Bismarck (59,503), Grand Forks (51,740), Minot (35,281), and West Fargo (23,081).

Age Distribution

Communities with a strong, growing and younger workforce often have more success sustaining long-term economic health. The following chart shows age distributions for Mandan-Morton County, the Bismarck MSA, the state, and the nation in 2007. Within the Bismarck metro area, people ages 18 to 44 accounted for 39 percent of the total population compared to 37 percent for the nation. Mandan-Morton County’s distribution shows that the community has a slightly older population compared to the metro – 18 to 44 year olds account for only 34 percent of the population in the city and county. However, Mandan-Morton’s age distribution is quite similar to the nation’s.

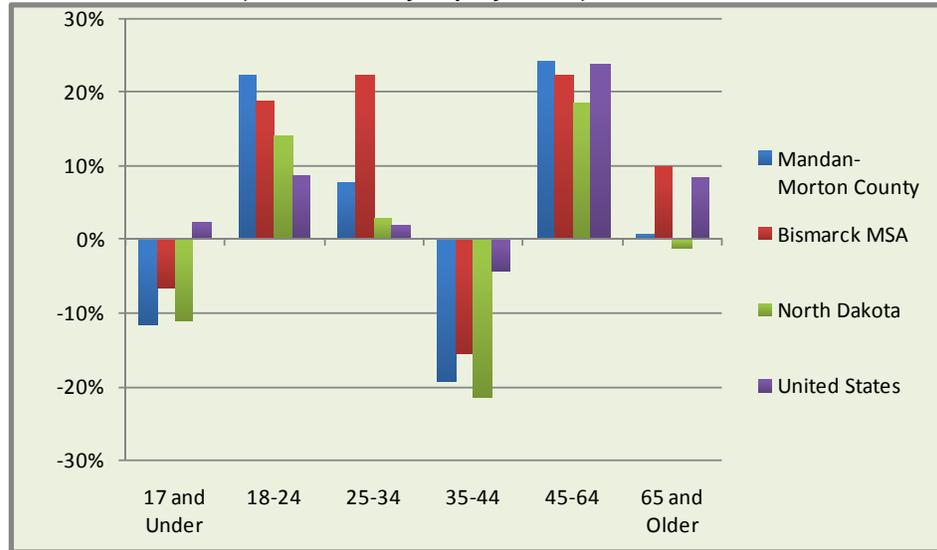
Age Distribution, 2007



Source: U.S. Census Bureau

The following chart show population changes by age groups that have occurred since 2000. Growth in the 18-24 and 25-34 age groups has outpaced the state and nation – positive trends for workforce capacity. However, smaller proportions of children ages 17 and younger at the local and regional level paired with their overall decline in number could signal potential workforce shortage issues in the future as the current workforce retires.

Population Change by Age Group, 2000-2007



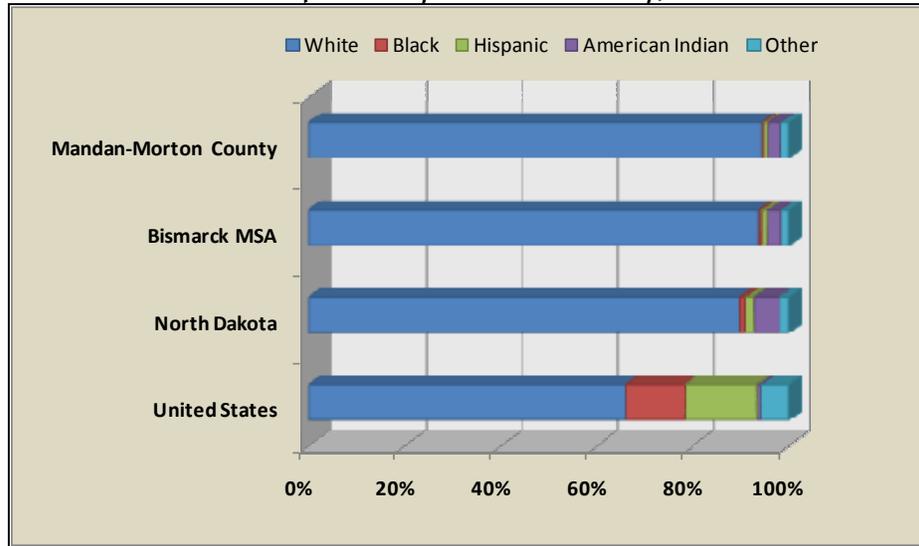
Source: U.S. Census Bureau

Race and Ethnic Composition

Compared to the state and the nation, Mandan-Morton County and the Bismarck metro area have higher proportions of white residents and a proportionately smaller number of minorities. In 2007, Mandan-Morton County’s total population was 94 percent white compared to 90 percent for the state and 66 percent for the nation. Its biggest minority group is American Indians, who represented three percent of the total population compared to five percent for North Dakota and one percent for the nation.²

² “White” and “Black” and “American Indian” include only non-Hispanic persons. “Hispanic” includes all persons of the Hispanic ethnicity regardless of race. “Other” includes all non-Hispanic persons in the U.S. Census Bureau race categories of; Asian; Native Hawaiian and Other Pacific Islander; Some Other Race; and Two or More Races.

Total Population by Race and Ethnicity, 2007



Source: U.S. Census Bureau

The following table shows population change by race and ethnicity since 2000. Growth within the white community accounted for only 50 percent of total population growth, diverging from regional growth dynamics. The local American Indian, Asian, and Hispanic communities all experienced significant growth in Mandan-Morton County during this time. Increasing diversity is a positive for the community. Many communities find that population diversity can provide tremendous opportunities to enhance local cultural attractiveness and economic vitality.

Population Change by Race and Ethnicity, 2000-2007

	White	Black	Hispanic	American Indian	Other
Mandan-Morton County	314	28	65	138	78
Percent change, 2000-07	1%	74%	40%	23%	22%
Bismarck MSA	6,256	294	572	275	399
Percent change, 2000-07	7%	144%	91%	10%	33%
North Dakota	(13,738)	2,358	4,216	3,159	1,520
Percent change, 2000-07	-2%	63%	54%	10%	14%
United States	4,538,793	3,089,367	10,198,493	217,851	2,154,747
Percent change, 2000-07	2%	9%	29%	11%	14%

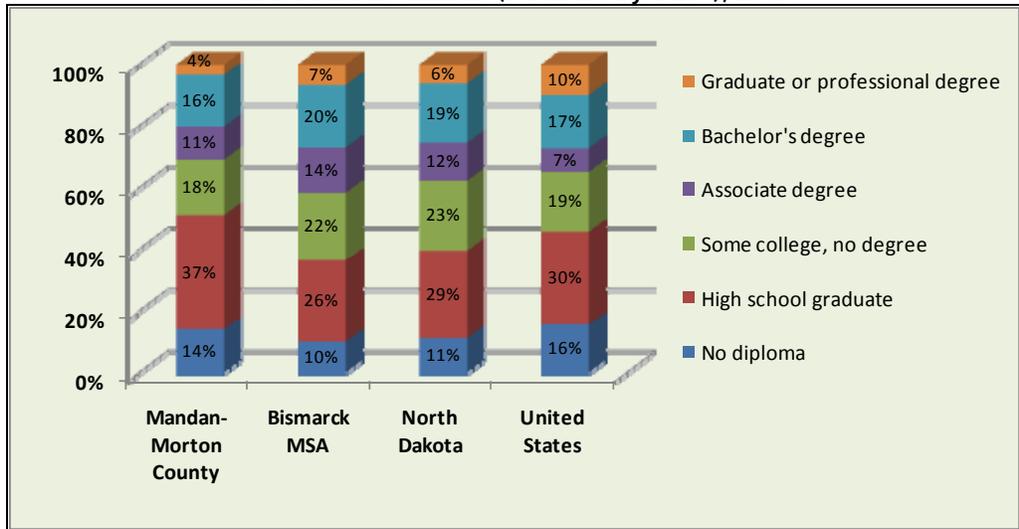
Source: U.S. Census Bureau

Educational Attainment

An important indicator of socio-economic well-being is educational attainment. Not only is educational attainment related to earning potential and income levels, but it also is one of the key determinants of a workforce’s competitiveness. The following chart shows the educational attainment of adults ages 25 and over in 2007.

Compared to the metro area, state, and nation, Mandan-Morton County has a larger proportion of residents who have not continued their education beyond high school – 51 percent compared to 36 percent for the MSA, 40 percent for the state, and 46 percent for the nation. Additionally, the community has a smaller proportion of residents holding a bachelor’s or graduate level degree.

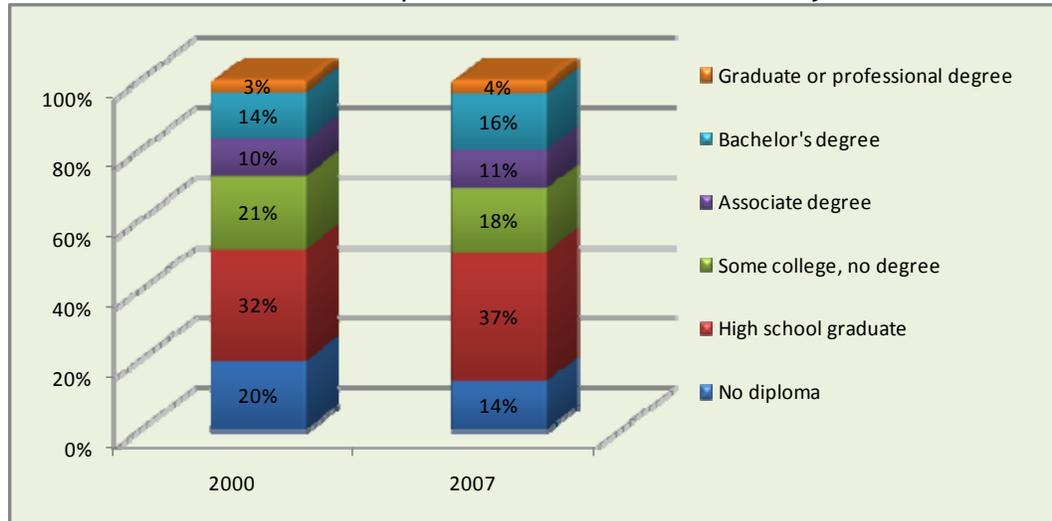
Educational Attainment (for adults ages 25+), 2007



Source: U.S. Census Bureau

However, since 2000 the community has seen an increase in its proportion of residents holding at least a high school graduates as well as those with bachelors, graduate, and professional degrees. Continuing to stem high school dropouts and provide advanced training for workers should be priorities for the Mandan-Morton County community, as its workforce is its most important asset for future economic growth and development.

Mandan-Morton County Educational Attainment (for adults ages 25+)

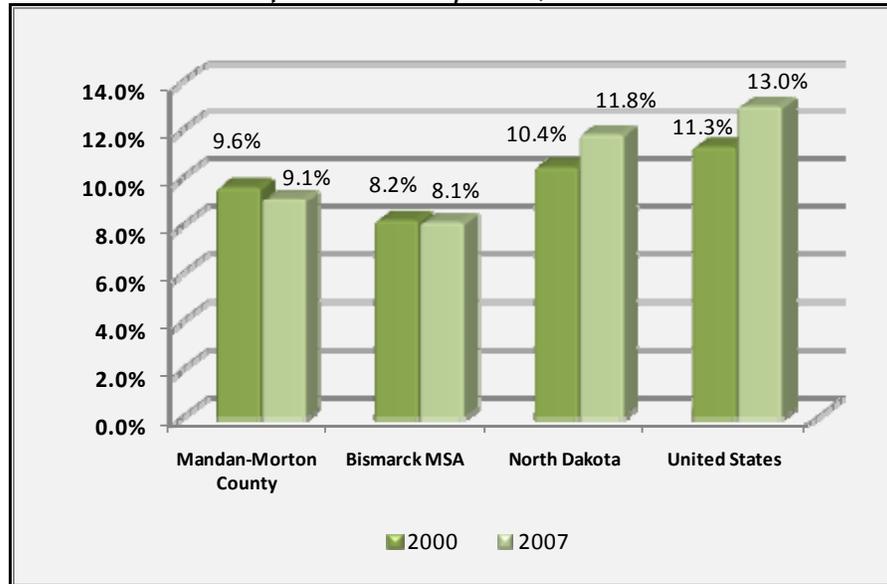


Poverty Rates

Examining poverty rates is one of the best ways to help gauge a community or region’s socio-economic prosperity. Poverty rates are estimated by the U.S. Census Bureau using income measures from annual population surveys. Information including family size, pre-tax income, and number of children help the Bureau determine poverty thresholds. If a family’s income is less than the poverty threshold, that family would be considered living in poverty. In 2007, the most recent year for which poverty rates are available, the poverty threshold for a family of four with two children was \$21,027. The poverty rate for an individual in 2007 was \$10,590.

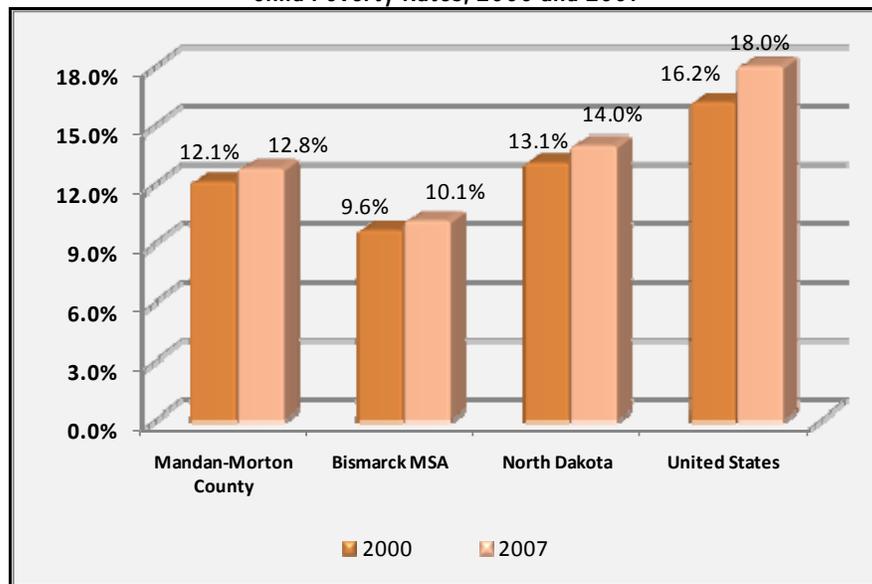
As shown in the following charts, poverty rates in Mandan-Morton County exceed those for the metro area but are lower than those for the state and the nation. The local total population poverty rate fell from 9.4 to 9.1 percent between 2000 and 2007 while those for the state and nation rose from 10.4 to 11.8 percent and 11.3 and 13.0 percent, respectively. Childhood poverty rates in Mandan-Morton County rose slightly since 2000 from 12.1 to 12.8 percent, following metro, state, and national trends. A declining total population rate coupled with a rising childhood poverty rates suggests that more adults have been able to lift themselves out of poverty, while low-income families with children seem to be falling further behind.

Total Population Poverty Rates, 2000 and 2007



Source: U.S. Census Bureau

Child Poverty Rates, 2000 and 2007



Source: U.S. Census Bureau

Per Capita Income

In general, raising the quality of life for local residents is a key focus of community and economic development. To this effect, per capita income (PCI) is one of the best measurements of a community’s progress in economic development, because it is an important indicator of economic stability and potential buying power. Per capita income is a measure of the total personal income of a place divided by its total population. By adjusting for inflation (real PCI), incomes across many years can be compared more accurately. Between 2000 and 2006, Mandan-Morton County’s real PCI grew by 15.7 percent from \$25,850 to \$29,920 compared to just 5.1 percent growth of PCI nationwide. In fact, local PCI growth outpaced that for the state (11.5 percent) and the Bismarck metro area (14.3 percent) during this time. While local PCI is only 87 percent of that for the metro area (\$29,920 compared to \$34,357 in 2006) and 91 percent of that for the state (\$29,920 compared to \$32,763 in 2006) strong growth rates at the local level show that this gap is closing.

Real Per Capita Income, 2000 and 2006

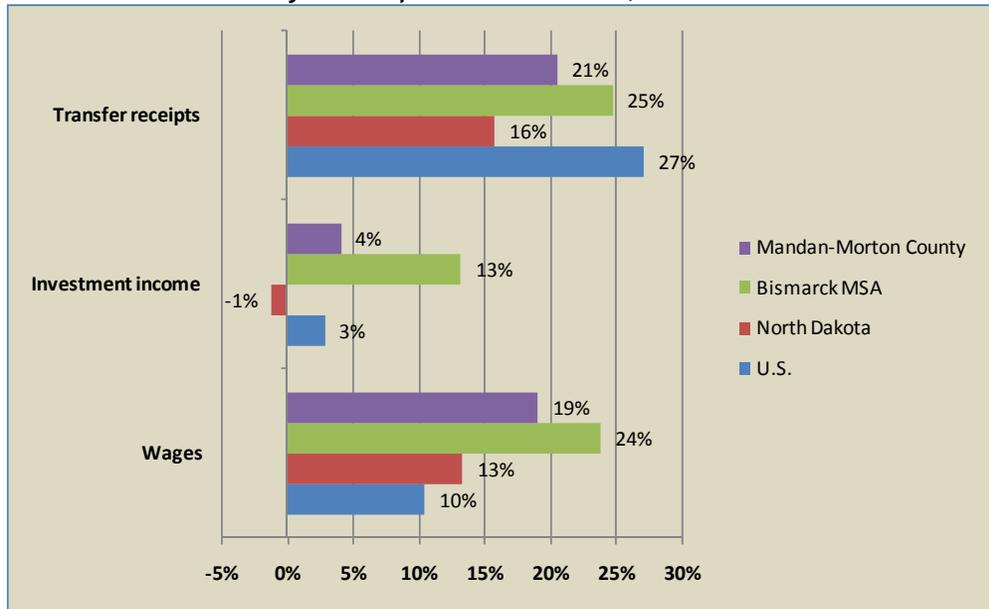
	2000	2006	Change	
			Percent	Amount
Mandan-Morton County	\$25,850	\$29,920	15.7%	\$4,070
Bismarck MSA	\$30,049	\$34,357	14.3%	\$4,308
North Dakota	\$29,389	\$32,763	11.5%	\$3,374
United States	\$34,940	\$36,714	5.1%	\$1,774

Source: U.S. Bureau of Economic Analysis

PCI comes from three sources: 1) earnings; 2) transfer payments, which includes social security, retirement income, public assistance, and other government assistance; and 3) dividends interest, and rent – sometimes referred to as investment income.

The following chart shows that the fastest growing components of income in Mandan-Morton County are transfer receipts and wages. However, transfer receipt growth was slower than the U.S. rate, while wage and investment gains topped state and national figures. This is a positive trend, indicating that growth in real PCI is primarily being spurred by new wealth rather than transfer receipts.

Change in Components of Real PCI, 2000-2006



Source: U.S. Bureau of Economic Analysis

APPENDIX C: ECONOMIC TRENDS

This report's economic profile examines trends in employment, wages, workforce activity, and entrepreneurship. These sections will help Mandan-Morton County stakeholders gain a broad understanding of recent economic changes within the community, and whether they differ or are reflective of trends within the Bismarck MSA, North Dakota, and the United States.

Employment Change

The following chart shows employment and average annual wage growth for Mandan-Morton County and the comparison geographies for Q2 2006 and Q2 2008. Mandan, Metro Bismarck, and the state of North Dakota have benefited from more robust job growth compared to the nation; however, wage growth in Mandan-Morton County has lagged behind. During this time, Mandan-Morton County's total employment grew by 2.2 percent (compared to 1.3 percent nationwide) while its average wage grew by 5.1 percent (compared to 7.2 percent nationwide).

This is due in part to local economic structure. Mandan-Morton County has its highest proportion of jobs in retail trade (which pays below the county's average annual wage), and its third highest proportion of jobs in manufacturing (which wages declined by 7.4 percent during this time).

Total Employment and Wages, Q2 2006 and Q2 2008

	Employment			Average Annual Wage		
	Q2 2008	Change since Q2 2006		Q2 2008	Change since Q2 2006	
		Number	Percent		Amount	Percent
Mandan-Morton County	9,288	199	2.2%	\$31,753	\$1,528	5.1%
Bismarck MSA	59,433	1,907	3.3%	\$34,941	\$2,656	8.2%
North Dakota	352,838	13,555	4.0%	\$34,031	\$3,311	10.8%
United States	136,141,522	1,701,221	1.3%	\$43,732	\$2,956	7.2%

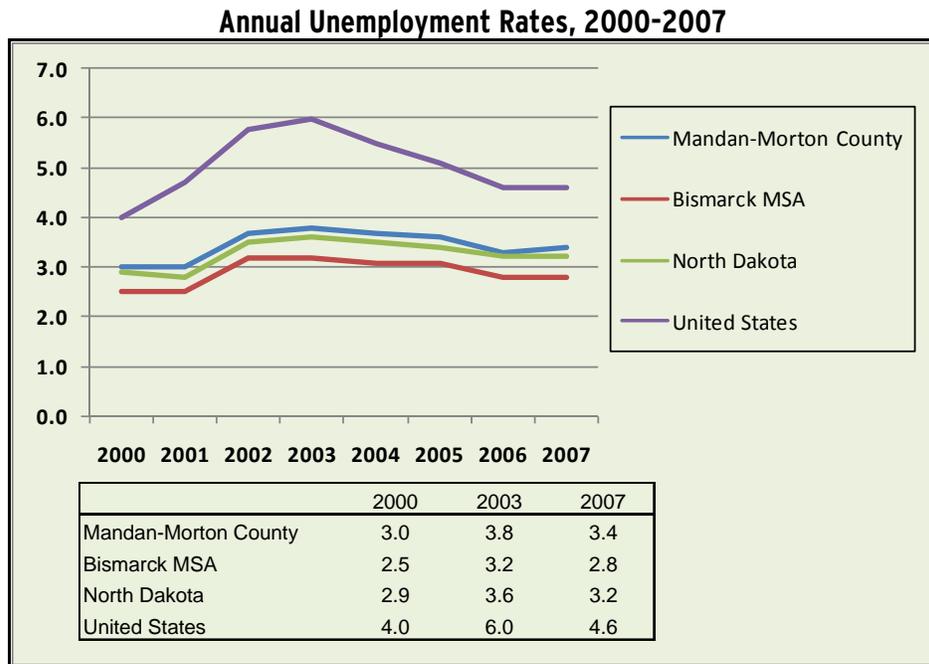
Source: U.S. Bureau of Labor Statistics

Unemployment Rates

Examining local unemployment rates compared to state and national trends provides a good barometer for the stability and health of a community's economy. The U.S. Bureau of Labor Statistics reports unemployment rates, tracking people month by month in the civilian labor force who were available for work, made specific efforts to

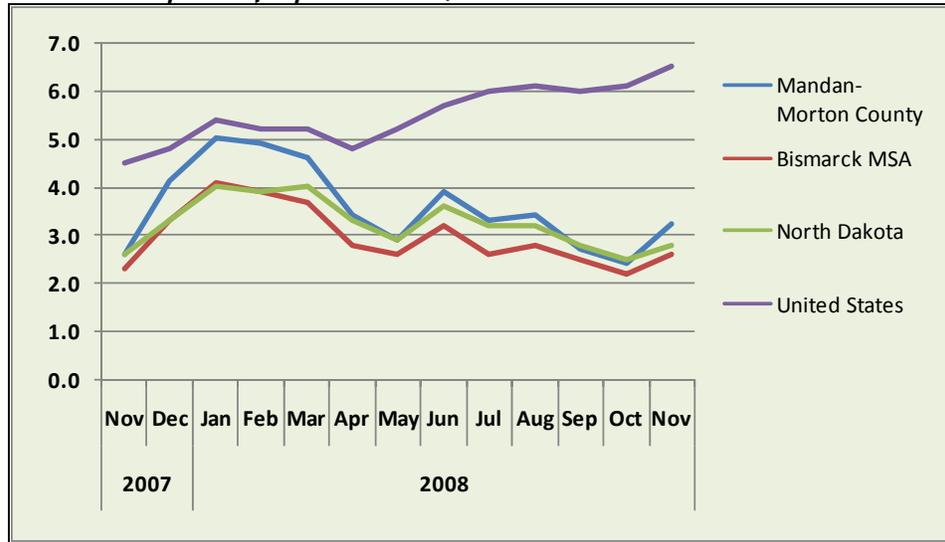
find employment, or who were waiting to be recalled to a job from which they had been laid off.

The following charts show annual unemployment rates since 2000 and monthly unemployment rates for the most recent 12 months available. Unemployment rates in Mandan, Bismarck metro, and the state have historically been lower than those for the United States. Unemployment rates in recent months have been more volatile: rates in Mandan-Morton County spiked from 2.6 in November 2007 to 4.9 in February 2008. Both local and national unemployment rates are trending upwards as a result of recent damage to U.S. financial and housing markets. The nation will continue to see rising unemployment, as crises in the housing and financial markets have destabilized workers' financial wellbeing, corporate bottom lines, and consumer confidence.



Source: U.S. Bureau of Labor Statistics

Monthly Unemployment Rates, November 2007 - November 2008



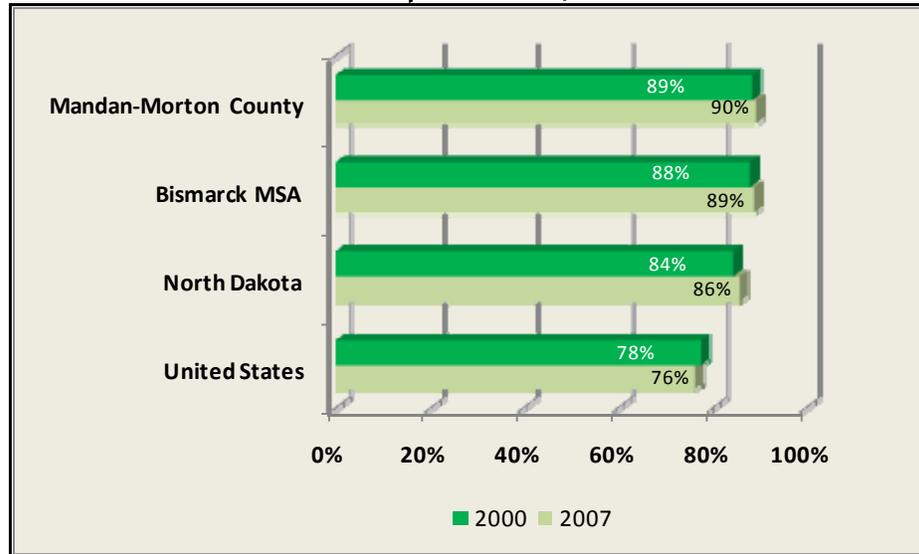
Source: U.S. Bureau of Labor Statistics

Labor Force Participation Rates

Labor force participation rates (LFPR) offer a more nuanced view of employment dynamics within a given area. Unemployment rates only measure those adults who are actively seeking work and receiving unemployment benefits. Yet many eligible workers may not be employed, and may not be receiving benefits for any number of reasons. Labor force participation rates measure the percentage of the potential workforce (ages 18 to 69) that is employed or looking for work divided by the total working aged population. The remaining adults comprise the so-called “hidden workforce” because they have either dropped out of the workforce or have given up looking for a job.

North Dakota, the Bismarck metro area, and Mandan-Morton County have benefited from solid job growth in recent years and maintained lower unemployment rates and higher labor force participation rates than the nation. Combined, these dynamics suggest a relatively tight labor market.

Labor Force Participation Rates, 2000 and 2007



Source: U.S. Bureau of Labor Statistics and the U.S. Census Bureau

Economic Structure

Analyzing the economic structure of Mandan-Morton County can provide insight into its economic diversity, opportunities, and challenges. The following chart shows employment by business sector in Q2 2008 for Morton County, sector employment as a percentage of total employment, and growth by sector on both the county and national levels. Only five sub-sectors shed jobs during this time: manufacturing, retail trade, transportation and warehousing, management of companies, administrative services, and accommodation and food services; however, losses in each sector were small in numbers. High-wage fields including construction, health care, wholesale trade, information, and professional and technical services all experienced strong growth during this time.

Mandan-Morton County Employment by Business Sector, Q2 2006 - Q2 2008

Business Sector	Employment Q2 2008		Change Q2 2006 - Q2 2008		
	Total	Percent of Total	Number Change	% Change	U.S. % Change
Construction	753	8.1%	47	7%	-5%
Manufacturing	919	9.9%	(24)	-3%	-5%
Wholesale trade	601	6.5%	37	7%	2%
Retail trade	1,099	11.8%	(21)	-2%	0%
Transportation and warehousing	260	2.8%	(12)	-4%	2%
Information	239	2.6%	14	6%	-1%
Finance and insurance	368	4.0%	5	1%	-2%
Professional and technical services	572	6.2%	21	4%	6%
Management of companies and enterprises	129	1.4%	(6)	-4%	7%
Administrative and waste services	141	1.5%	(22)	-13%	-2%
Educational services*	873	9.4%	19	2%	3%
Health care and social assistance*	1,008	10.9%	141	16%	6%
Arts, entertainment, and recreation	205	2.2%	19	10%	5%
Accommodation and food services	746	8.0%	(36)	-5%	3%
Other services, except public administration	326	3.5%	19	6%	3%
Public administration	549	5.9%	11	2%	3%
Total Employment	9,288	100%	199	2%	1%

Source: U.S. Bureau of Labor Statistics

Note: Total employment does not add up to the sum of sector employment due to data suppression issues. Data for the following subsectors are not included because each accounts for less than two percent of Mandan-Morton County's total employment: agriculture, forestry, fishing and hunting; mining; utilities; and real estate and rental and leasing.

*Data is not available through the BLS due to privacy issues. However, comparable data is available through the Census' Quarterly Workforce Indicators survey for Q4 2005 and Q3 2007 (the most recent quarter available). For these subsectors where BLS Quarterly Census of Employment and Wages data are suppressed, Census QWI data have been supplemented.

Location quotients are an effective means of determining the comparative strength of an employment sector in a community compared to a larger area. Location quotients (LQ) are ratios representing the strength of a local business sector in relation to the national average. They are represented formulaically as:

$$LQ = \frac{(\text{County Employment in Sector} / \text{Total County Employment})}{(\text{National Employment in Sector} / \text{Total National Employment})}$$

If a location quotient is greater than 1.00, the area has a larger share of employment in that sector than the nation. A LQ greater than 1.00 suggest sectors for which the economy has developed strength, indicating a possible comparative advantage. Conversely, if a location quotient is less than 1.00, this indicates a smaller local share of employment than the nation. Just because a sector has a location quotient below

1.00 does not preclude it from being a target business cluster for the community. Similarly, a LQ over 1.00 does not automatically mean the community should aim for that sector. A number of factors, including national trends, local support services, and regional clusters, contribute to the viability of a local business sector.

As shown in the following chart, Mandan-Morton County has LQs over 1.0 in ten out of its sixteen major industries. This suggests that the County has a relatively diversified economy. Although many LQs have declined slightly in the past two years, this is because job growth has occurred in many business sectors working to further diversify the economy instead of growing one or two sectors in particular.

Mandan-Morton County Location Quotients, Q2 2006 and Q2 2008

Business Sector	Q2 2006	Q2 2008	Change
Construction	1.32	1.48	0.15
Wholesale trade	1.42	1.47	0.05
Arts, entertainment, and recreation	1.15	1.20	0.05
Information	1.04	1.11	0.06
Public administration	1.10	1.08	-0.02
Professional and technical services	1.09	1.06	-0.03
Retail trade	1.08	1.05	-0.03
Other services, except public administration	1.02	1.04	0.02
Educational services*	1.05	1.03	-0.02
Management of companies and enterprises	1.12	1.00	-0.12
Manufacturing	0.98	0.99	0.01
Accommodation and food services	1.02	0.93	-0.09
Finance and insurance	0.89	0.91	0.02
Health care and social assistance*	0.78	0.85	0.07
Transportation and warehousing	0.76	0.71	-0.05
Administrative and waste services	0.29	0.25	-0.04

Source: U.S. Bureau of Labor Statistics

Note: Data for the following subsectors are not included because each accounts for less than two percent of Mandan-Morton County's total employment: agriculture, forestry, fishing and hunting; mining; utilities; and real estate and rental and leasing

*Data is not available through the BLS due to privacy issues. However, comparable data is available through the Census' Quarterly Workforce Indicators survey for Q4 2005 and Q3 2007 (the most recent quarter available). For these subsectors where BLS Quarterly Census of Employment and Wages data are suppressed, Census QWI data have been supplemented.

Average annual wage is a good indicator of the wealth-generating potential of local jobs. Cross-referencing average wages with location quotients can help show if a community is competitive in relatively high or low-wage business sectors. As shown in the following chart, most of Mandan-Morton County's sectors have experienced solid wage growth. In particular, professional and technical services, management of companies, construction, and information are all sub-sectors that pay above the

County's average annual wage and experienced a higher rate of growth than the County as a whole. The only sector which pays more locally than the national average is retail trade, which pays \$28,074 on average in Mandan-Morton County compared to \$26,127 nationally.

Average Annual Wages by Business Sector, Q2 2006 and Q2 2008

		Mandan-Morton County			U.S.	
		Q2 2008	Change since Q2 2006	% change since Q2 2006	Q2 2008	% change since Q2 2006
Wages above County average	Manufacturing	\$47,486	-\$3,808	-7.4%	\$52,522	6.0%
	Professional and technical services	\$43,376	\$3,747	9.5%	\$70,633	9.9%
	Public administration	\$37,669	\$1,722	4.8%	\$52,568	9.0%
	Transportation and warehousing	\$37,168	\$1,351	3.8%	\$44,594	6.3%
	Management of companies and enterprises	\$37,095	\$7,499	25.3%	\$87,331	5.3%
	Finance and insurance	\$36,132	\$802	2.3%	\$70,815	6.5%
	Construction	\$34,546	\$3,987	13.0%	\$46,773	10.0%
	Wholesale trade	\$32,609	\$1,642	5.3%	\$58,746	6.9%
	Information	\$32,584	\$7,349	29.1%	\$64,935	7.7%
Wages below County average	Retail trade	\$28,074	\$2,540	9.9%	\$26,127	3.3%
	Other services, except public administration	\$22,115	\$954	4.5%	\$28,362	6.8%
	Administrative and waste services	\$21,609	-\$3,856	-15.1%	\$31,119	8.6%
	Accommodation and food services	\$11,416	\$1,378	13.7%	\$16,487	6.6%
	Arts, entertainment, and recreation	\$8,005	-\$1,433	-15.2%	\$28,145	6.1%
No data avail.	Educational services*	-	-	-	\$43,010	8.5%
	Health care and social assistance*	-	-	-	\$41,648	7.1%
Average Annual Wage (all sectors)		\$31,753	\$1,528	5.1%	\$43,732	7.2%

Source: U.S. Bureau of Labor Statistics

Note: Data for the following subsectors are not included because each accounts for less than two percent of Mandan-Morton County's total employment: agriculture, forestry, fishing and hunting; mining; utilities; and real estate and rental and leasing

*Data is not available through the BLS due to privacy issues, and comparable data is not available through the Census Bureau QWI program.

Entrepreneurship

Small businesses help diversify and strengthen local economies and buffer the community against the closing of large companies. This is why small business development and entrepreneurship are two important components of strong economic development strategies.

In Mandan-Morton County, the highest percentage (17.6 percent) of self-employed individuals (also called “non-employers”) are working in “other” services, followed by retail trade (12.8 percent), health care (12.6 percent), and construction (11.4 percent). The U.S. Census Bureau defines other services as, “primarily engaged in activities such as equipment and machinery repairing, promoting or administering religious activities, grant-making, advocacy, and providing dry-cleaning and laundry services, personal care services, death care services, pet care services, photofinishing services, temporary parking services, and dating services.” There are certain disparities between sector concentrations in Mandan-Morton County and the comparison areas. Compared to the Bismarck metro area and United States, there are smaller proportions of local entrepreneurs in “white collar” services including professional and technical services, real estate, finance and insurance, and information.

Non-Employers by Business Sector, 2006

	Mandan-Morton County	Bismarck MSA	North Dakota	United States
Total Non-Employers	1,814	7,440	44,308	20,768,555
Percent of all non-employer firms				
Other services	17.6%	14.3%	14.8%	14.1%
Retail trade	12.8%	13.3%	12.7%	8.9%
Health care and social assistance	12.6%	12.7%	12.6%	8.3%
Construction	11.4%	10.9%	10.9%	12.3%
Professional, scientific, and technical services	9.4%	11.1%	9.6%	14.0%
Real estate and rental and leasing	9.2%	10.2%	9.3%	11.7%
Transportation and warehousing	6.2%	3.6%	5.3%	4.8%
Administrative and waste management	5.0%	5.0%	5.0%	7.1%
Finance and insurance	4.5%	6.5%	4.9%	3.7%
Arts, entertainment, and recreation	3.9%	4.4%	4.0%	4.8%
Educational services	1.7%	2.5%	2.3%	2.3%
Wholesale trade	1.6%	1.4%	1.4%	1.9%
Manufacturing	0.9%	0.9%	1.2%	1.5%
Accommodation and food services	0.9%	0.6%	1.4%	1.4%
Information	0.8%	1.1%	0.9%	1.5%

Source: U.S. Census Bureau

The following chart shows growth in average income for non-employers between 2002 and 2006. Local entrepreneur average incomes are lower than the metro area, state, and nation – following general wage trends. In 2006, non-employer average annual earnings in Mandan-Morton County were \$31,719 compared to over \$35,000 for the metro area and state, and \$46,724 for the nation.

It is interesting to note that local non-employer earnings grew by 10 percent during this time, compared to eight percent in the metro area, five percent at the state level, and seven percent nationally.



Source: U.S. Census Bureau

CONCLUSION

This *Economic and Demographic Snapshot* provided an interesting look at some of the trends affecting businesses and residents of Mandan (and Morton County) in the recent past. The report shows a community that is maturing, with an adult population that – while older on average than the region – is increasingly becoming better educated and more diverse. Incomes are increasing, but poverty is still an issue for many of the city’s residents. Trends also show a potentially tightening available labor force in Mandan-Morton County.

Mandan and Morton County’s economy and wage growth are also positive considering recent economic conditions, yet lag the growth of the region and state. Unemployment is also slightly higher in Mandan-Morton than Metro Bismarck and North Dakota. Yet, as noted, local conditions are far stronger than the nation as a whole; this is a welcome sign that Mandan-Morton County’s economy is diverse enough to weather continuing economic storms caused by the prolonged global recession.

As this strategic visioning process continues, further competitive dynamics and local stakeholders’ thoughts and hopes for their community’s future will come into clearer focus.

Ultimately, the city of Mandan will have a proactive, consensus vision plan to guide its future growth and development.