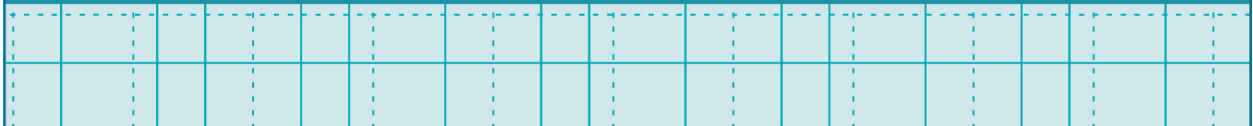
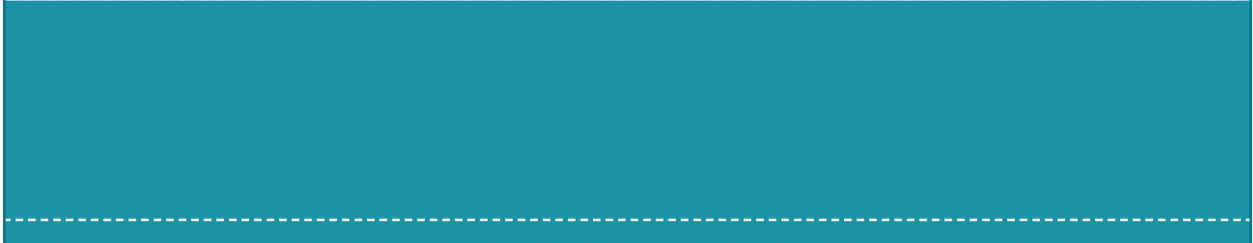




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TOURISM CENTER

# Lodging Workforce Study in Cass and Crow Wing Counties



Authored by Tammy Koerte, Cynthia C. Messer, Chet Bodin, and Benjamin Gronowski



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## EXECUTIVE SUMMARY

The tourism industry is a leading economic driver in Minnesota, generating \$15 billion in gross sales, 265,000 full- and part-time jobs, \$5.4 billion in wages and 18 percent of state sales tax revenue (Explore Minnesota Tourism, 2018). In the Central Minnesota counties of Cass and Crow Wing, tourism generates over \$350 million in gross sales and supports more than 6,000 jobs (Explore Minnesota Tourism, 2018). In 2016, the two counties accounted for only 1.4 percent of employment in Minnesota but had 8 percent of the state's accommodation jobs. These jobs range from entry level to management positions.

The tourism industry in Cass and Crow Wing counties has struggled to fill positions. Since 2014, the regional Accommodation and Food Services industry has averaged over 500 vacancies, even when accounting for seasonal fluctuations. Unfortunately, future demographic shifts are pointing toward significant labor force contractions in both counties, which could lead to significant challenges for area tourism, the broader economy, and the community.

The purpose of this study was to provide a qualitative view of the current and future workforce challenges facing the lodging sector in Cass and Crow Wing counties, examine regional and state models, and provide ideas to empower local action for long-term, sustainable strategies to maintain tourism as part of the region's economy.

To understand the workforce challenges facing the lodging sector in Cass and Crow Wing counties, an online survey and follow-up interviews were conducted with lodging businesses. Interviews were conducted with key stakeholders in other cold-climate states to better understand the workforce challenges and strategies being implemented in other areas with seasonal tourism. Community meetings were held in Cass and Crow Wing counties to share study findings and facilitate discussions on potential strategies.

### Study findings

Forty-eight surveys were completed and follow-up interviews were conducted with 12 survey participants. Approximately 98 percent of the participants own or manage a lodging business that has been in business for at least five years, with 62.5 percent reporting being in business for at least 20 years. Participants generally have a high need for employees during their peak season of June through August as well as the months immediately before and after the peak summer season (e.g., April, May, September, October). The months in which participants reported a high demand for employees are also the months they experienced the most difficulty filling open positions.

Participants used a variety of employee recruitment methods, with varying levels of success. In general, participants have found employee referrals and word-of-mouth to be effective recruitment methods. Participants experienced less success with some of the traditional employee recruitment methods, including print advertisements, career fairs and industry associations.

Participants reported a variety of workforce challenges, most of which are not unique or isolated to the tourism industry. Challenges associated with transportation, housing, government benefits and assistance programs, substance use, a lack of workers, and a perceived lack of soft skills among potential employees are likely impacting other businesses and the greater community.

### Strategies

A variety of strategies to address workforce challenges were identified during the study, including employee referrals, social media, and offering incentives for working the entire season. A number of participants also identified active community involvement as beneficial to local recruitment. These included volunteering with local schools, organizations and youth programs. Many of the workforce challenges being experienced by the lodging sector are not unique to the lodging and tourism



industry. Other businesses and the larger community in Cass and Crow Wing counties are likely experiencing the same challenges. Thus, while potential strategies were identified as part of this study, it is critical that lodging businesses collaborate with other businesses and community partners to address challenges related to housing, transportation, substance use and the workforce challenges associated with the government benefits and assistance programs.

Findings of this study can be used by lodging businesses, community organizations and elected officials to inform decision-making, encourage collaboration and build resilient partnerships. A positive immediate outcome of this study is that the directors of several regional chambers of commerce have stepped forward to offer opportunities to continue the dialogue on workforce challenges and strategies.



## BACKGROUND

The tourism industry is a leading economic driver in Minnesota, generating \$15 billion in gross sales, more than 265,000 full- and part-time jobs, \$5.4 billion in wages, and 18 percent of state sales tax revenue (Explore Minnesota Tourism, 2018). In the Central Minnesota counties of Cass and Crow Wing, tourism generates over \$350 million in gross sales and supports more than 6,000 jobs (Explore Minnesota Tourism, 2018). In 2016, the two counties accounted for only 1.4 percent of employment in Minnesota but had 8 percent of the state's accommodation jobs. These jobs range from entry level to management positions.

Increasingly the tourism industry struggles to fill positions and align opportunities with the regional workforce. Since 2014, the regional Accommodation and Food Services industry has averaged over 500 vacancies, even when accounting for seasonal fluctuations. Unfortunately, future demographic shifts are pointing toward significant labor force contractions in both counties (Appendix B), which could lead to significant sustainability challenges for area tourism, the broader economy, and the community.

This study was developed to provide a qualitative view of the current and future workforce challenges facing the lodging sector in Cass and Crow Wing counties, examine regional and state models, and provide ideas to empower local action for long-term, sustainable strategies to maintain tourism as part of the region's economy. An advisory committee was formed to guide and inform the development of this study. The advisory committee provided input and feedback on the overall study, survey design and study findings.

## METHODS

This study involved the following data collection methods: online survey, interviews with survey participants who indicated interest in participating in a follow-up interview, and interviews and conversations with individuals who could provide insight on lodging workforce challenges and strategies both within and outside of Minnesota. Each of the data collection methods are discussed below.

### Online survey

An online survey was developed and administered using Qualtrics. The online survey (Appendix A) included questions addressing the following topics: business information, general recruitment and hiring information, local workforce, international workforce, and recruitment and retention challenges and strategies.

The contact list for the survey was provided by Explore Minnesota Tourism (EMT). The list was comprised of lodging businesses listed in EMT's database located in Cass or Crow Wing counties and self-classified as a B&B/historic inn, campground, hotel/motel, or resort. The survey was limited to licensed, multi-unit commercially operated businesses. Private home rentals listed on Airbnb, Vacation Rentals by Owner, and other similar sites were not included in this study.

The survey was launched on October 17, 2017 and sent to 229 lodging businesses (email and postal mail). For lodging businesses in which an email address was provided, an email was sent a week prior to the launch of the survey informing them of the study and that a survey link would be sent the following week. Two weeks after the launch of the survey, a reminder email was sent.

EMT's regional manager for the Northwest and Central region also sent a reminder email to lodging businesses in Cass and Crow Wing counties and shared the survey with visitor bureaus and chambers of commerce within the two counties.



A total of 48 completed surveys were received between October 17, 2017 and November 20, 2017.

### **Interviews with survey participants**

Upon completing the online survey, participants were asked if they were interested in participating in a follow-up interview about their workforce challenges. The purpose of these interviews was to better understand the workforce challenges being experienced by the participants, the factors influencing those challenges, and the strategies being implemented or were of interest to the participants.

Interviews were conducted with 12 participants either in-person or by phone between October 26, 2017 and December 15, 2017. Nine interviews were audio-recorded and transcribed. Three interviews were not audio-recorded. Instead, these participants received the interviewer's notes of the conversation to review for accuracy.

The analysis of qualitative data was completed by two members on the research team. Both individuals coded the interview transcripts and open-ended survey responses independently before meeting to discuss analysis results and any differences in codes. In all cases, the two team members agreed on the final codes and themes. The workforce challenges included in this report were those discussed by multiple participants.

### **Interviews with cold-climate states**

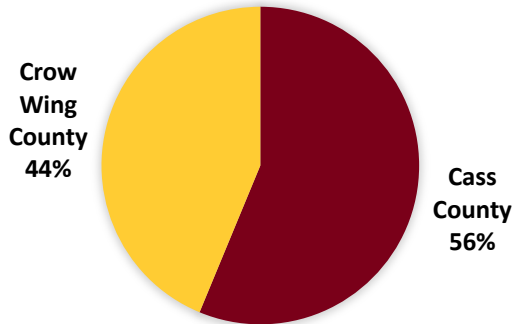
In addition to understanding the workforce challenges being experienced by lodging businesses in Cass and Crow Wing counties, interviews were conducted with individuals in five other cold-climate states (Maine, Michigan, Montana, South Dakota, and Wisconsin). The purpose of these interviews was to understand the lodging workforce challenges being experienced in other cold-climate states, as well as the workforce strategies being implemented in these states. Informal conversations were also conducted with individuals within Minnesota who could provide insight on workforce challenges and strategies.

### **Community meetings**

The last step in this study was facilitating local community conversations. Two community meetings were held in Cass and Crow Wing counties to share study findings and discuss strategies to address workforce challenges. Twelve participants attended the Cass County meeting on Thursday, April 5<sup>th</sup> at the Leech Lake Area Chamber of Commerce in Walker. Eighteen participants attended the Crow Wing County meeting on Friday, April 6<sup>th</sup> at the Crow Wing County Land Services building in Brainerd. A number of business owners, managers, human resource directors and chamber of commerce executives participated in these conversations. For some, this was the first time they participated in this type of discussion with lodging businesses locally. Attendees expressed interest in continued conversations, and several regional chambers of commerce volunteered to host future discussions.

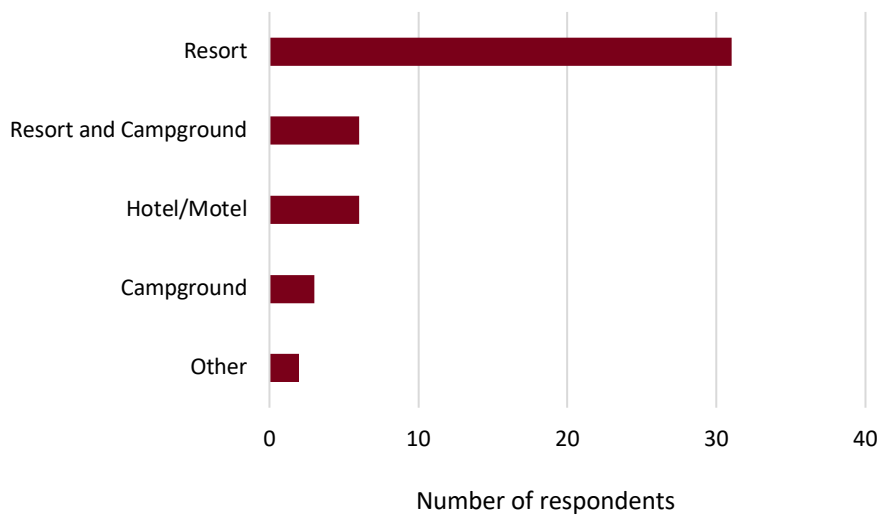
## SURVEY RESULTS

Lodging businesses in Cass County accounted for 56 percent of the survey responses, with 44 percent from Crow Wing County (Figure 1).



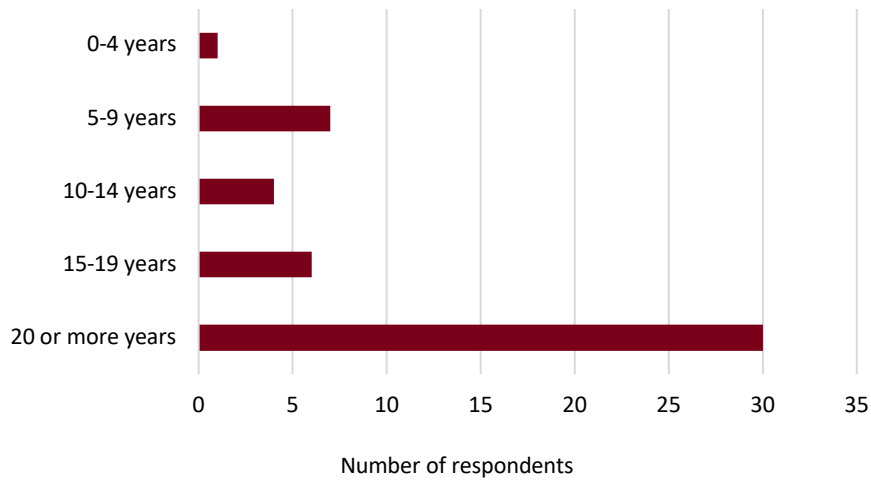
**Fig. 1:** Location of lodging businesses (n=48)

Survey participants self-identified the category (or categories) that best described their lodging business (Figure 2). Resorts accounted for a significant proportion (31 of 48) of lodging types in the survey. The two businesses identified as 'Other' are a combination of lodging and either a restaurant or retail establishment.



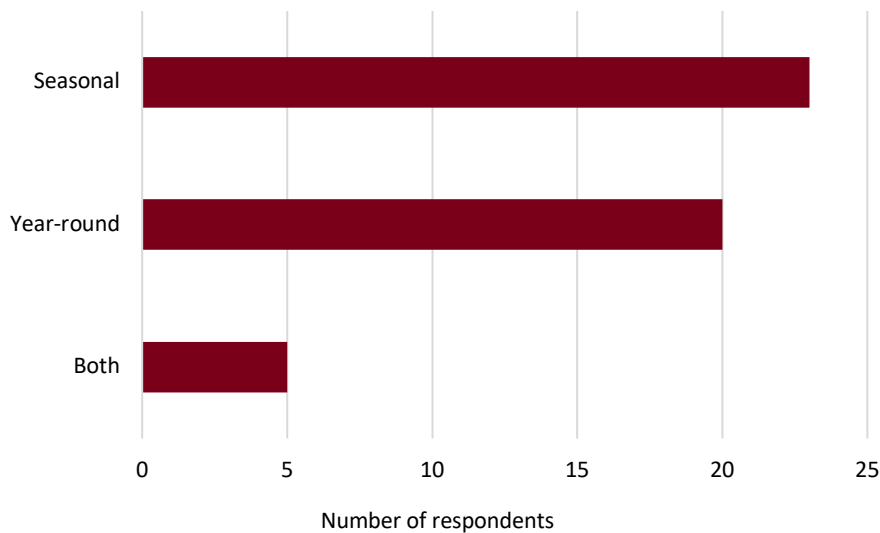
**Fig. 2:** Type of lodging businesses (n=48)

The lodging businesses participating in the survey are established businesses that have been operating for many years (Figure 3). All participants except for one reported being in business for at least five years. Thirty participants have been in business for 20 or more years.



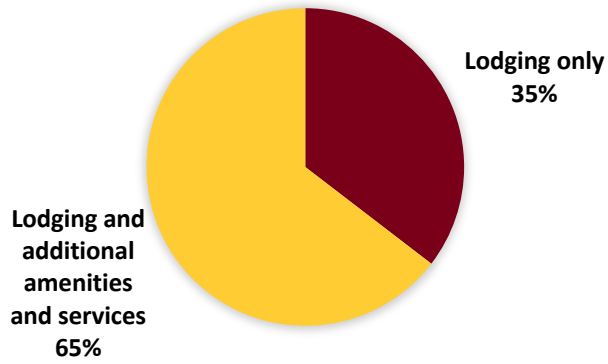
**Fig. 3: Years in business (n=48)**

A mix of year-round and seasonal lodging businesses participated in the study (Figure 4). Twenty businesses operated year-round, 23 had seasonal operations, and five indicated a combination of seasonal and year-round operations. Those who reported both seasonal and year-round operations explained they reduced their offerings or service during shoulder seasons or were open for most of the year (but not the entire year).



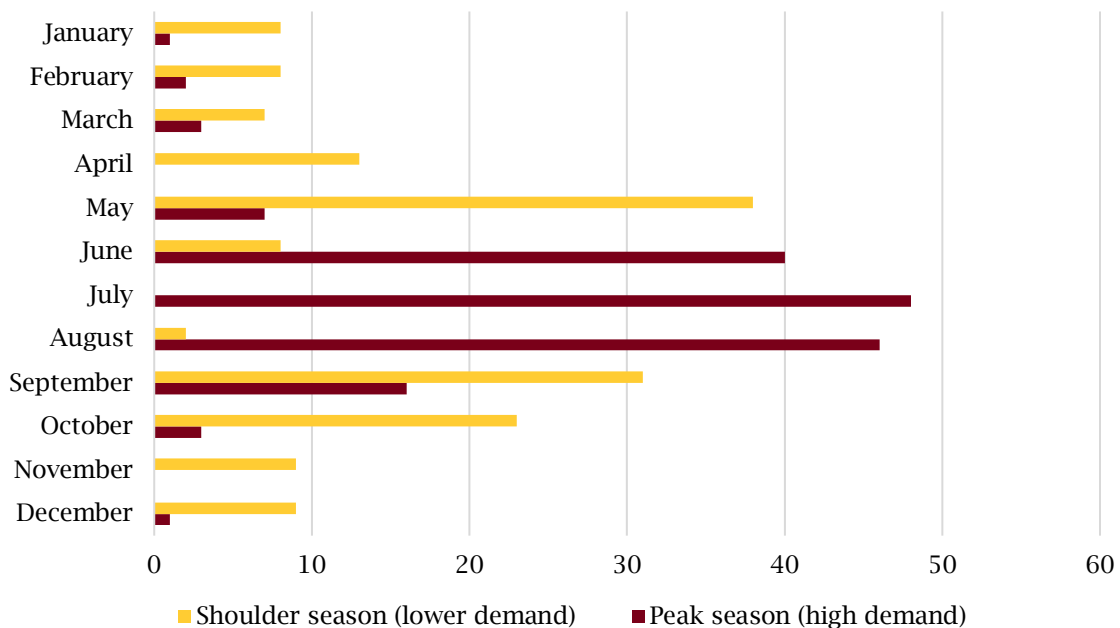
**Fig. 4: Year-round and seasonal operations (n=48)**

Most of the participating lodging businesses offer services and amenities, in addition to lodging accommodations (Figure 5). Sixty-five percent of the participants provided guests with services and amenities like food service, recreation activities/rentals, and entertainment.



**Fig. 5:** Lodging and additional amenities and services (n=48)

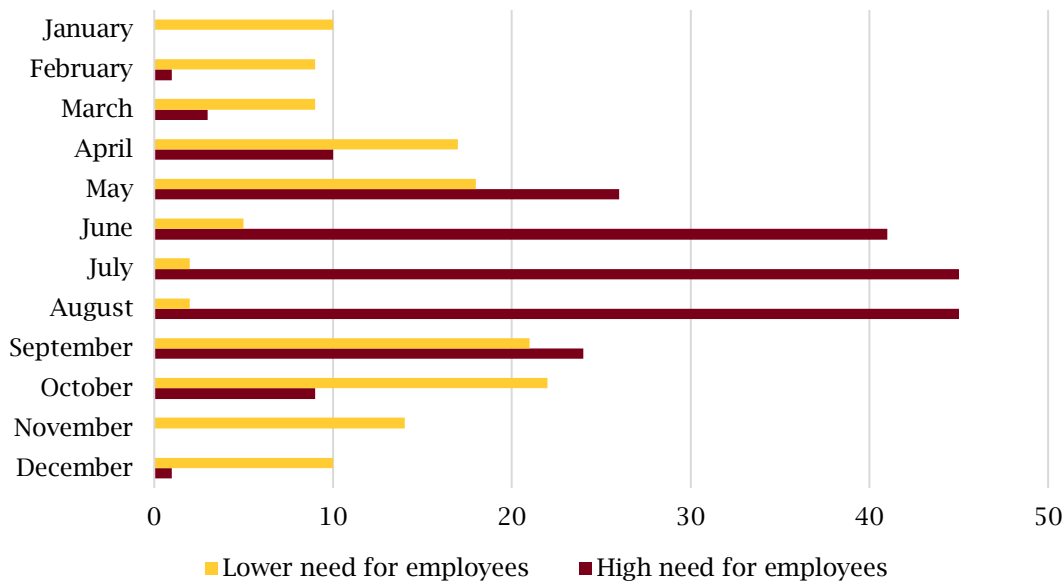
Participants were asked to select the months comprising their peak and shoulder seasons, as well as the months in which they had minimal demand or are closed for business (Figure 6). Peak season for most participants were the months of June, July and August, with some extending into May and September.



**Fig. 6:** Business demand (peak and shoulder seasons)

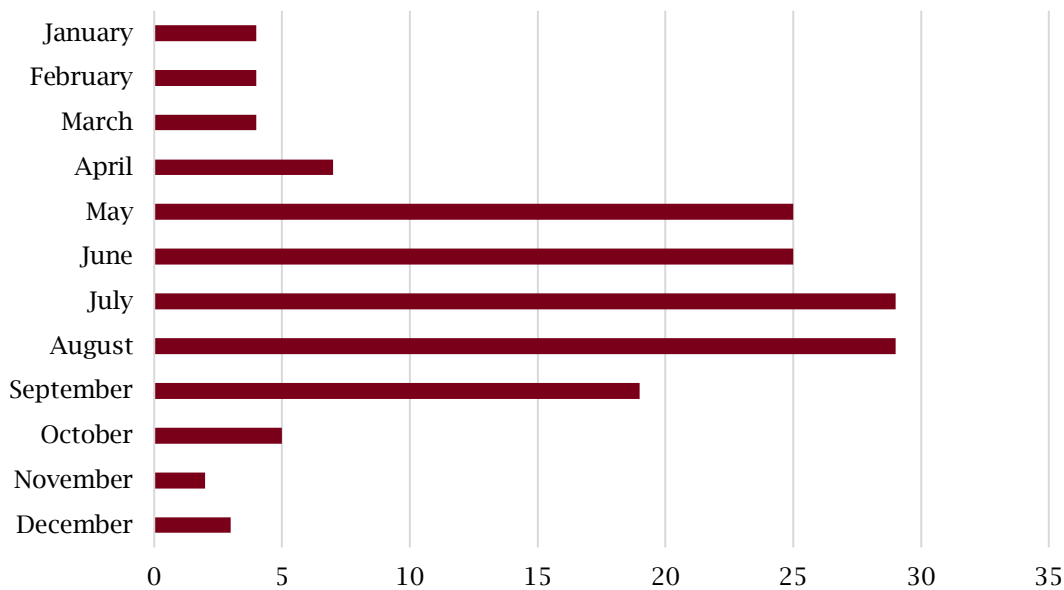
In addition to business demand, participants were asked to select the months in which they had a higher need for employees, lower need for employees, and minimal or no need for employees (Figure 7). Participants had a high need for employees in May, June, July, August and September with some also indicating a high need for employees in March, April and October. Overall, the demand for employees was aligned with business demand. There is a relatively high need for employees in the

months prior to, and after, their peak season. This is due to the need to open and close the lodging business for the season.



**Fig. 7:** Demand for employees (high and lower need)

Participants were also asked to select the months (maximum of four) in which they experienced the greatest difficulty filling open positions. The months in which participants had a high need for employees were also the months they had the greatest difficulty filling open positions.

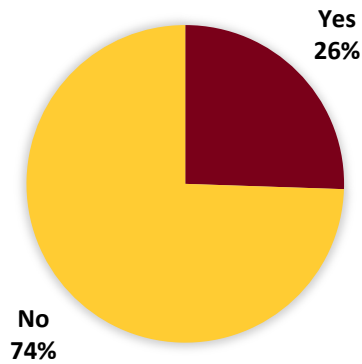


**Fig. 8:** Month with the greatest difficulty filling open positions



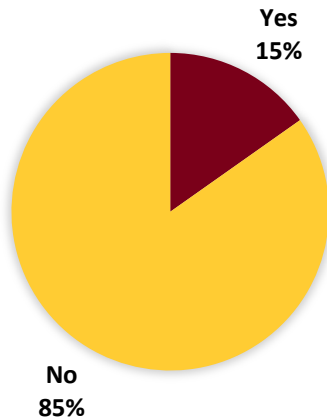
In general, lodging businesses operated with a small staff. During full operation, lodging businesses had an average staff size of 13.6 employees (n=45), which includes the survey respondent and family members. Two lodging businesses reported significantly larger staff sizes and were not included in the calculation, as it skewed the average staff size.

Most lodging businesses did not regularly employ contractors to fulfill operational requirements (e.g., housekeeping services, grounds maintenance) to supplement their workforce (Figure 9).



**Fig. 9:** Regularly employ contractors (n=47)

Few lodging businesses offered employment in which wages were not the primary form of compensation (Figure 10). Fifteen percent of survey participants offered compensation primarily in the form of housing, meals, etc.



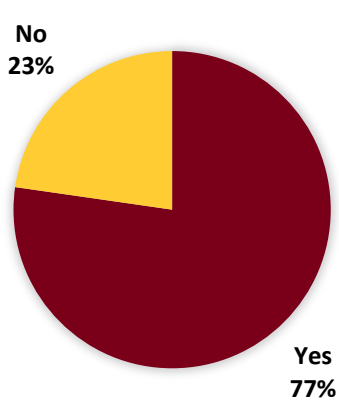
**Fig. 10:** Employment in which wages are not the primary form of compensation (n=46)

Participants were asked to select the benefits and incentives they offer employees (Table 1). Overall, participants offered financial incentives (e.g., bonuses), meals, and use of facilities or amenities to year-round and seasonal full-time and part-time staff. Participants also reported offering other benefits and incentives, including discounts on merchandise, movie passes, and employee rates at 'sister' properties.

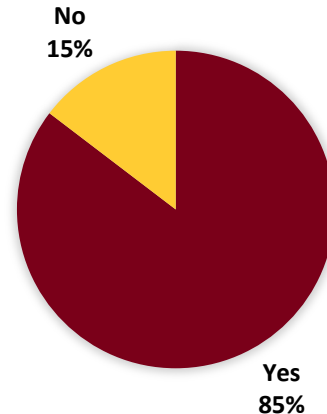
Benefit/Incentive	Year-round		Seasonal	
	Full-time	Part-time	Full-time	Part-time
Medical insurance	4	0	1	3
Paid leave	3	1	1	1
Retirement plan	4	1	0	0
Financial incentives (e.g., bonuses)	6	5	3	12
Returning bonus	1	1	4	6
Housing	1	1	3	6
Meals	5	5	5	16
Transportation	0	1	0	6
Use of facilities or amenities	12	10	11	24

**Table 1:** Benefits and incentives offered to employees (n=38)

In the last two years, most participants had to increase wages more than they normally would in order to both recruit and hire employees (Figure 11) and retain employees (Figure 12).



**Fig. 11:** Increased wages to recruit/hire employees (n=44)



**Fig. 12:** Increased wages to retain employees (n=41)

### Recruitment methods

Participants were asked to rate the level of effectiveness of various employee recruitment methods (Table 2). In general, participants found employee referrals and word-of-mouth to be effective employee recruitment methods. Participants experienced less success with some of the more traditional employee recruitment methods, including print job advertisements, career fairs and industry associations. Employee and recruitment agencies, high school career centers and university/college career centers are methods many participants had not used but were considering. Of those who have used those methods, most found them to be ineffective.

In addition to the identified recruitment methods, two participants reported personally recruiting at high schools and cold calling families they know that have children on the school honor roll to be very effective recruitment strategies.

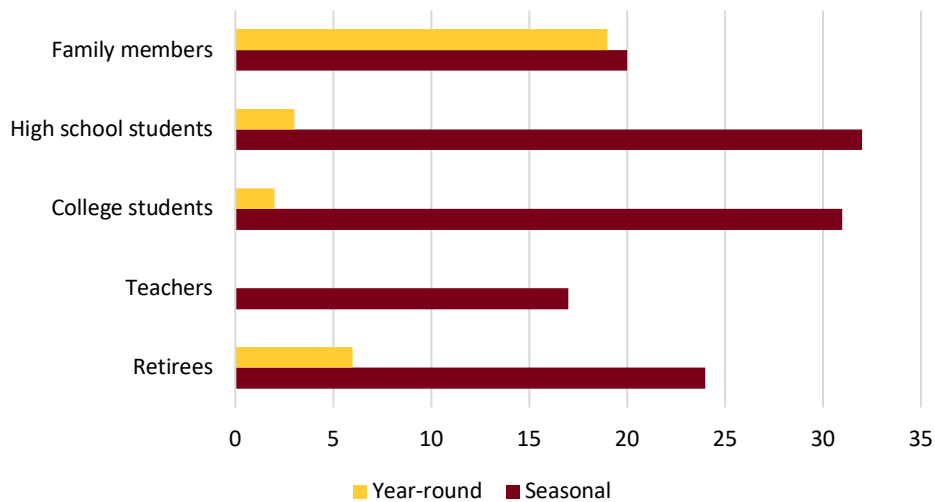
	Very effective	Effective	Ineffective	Very ineffective	Have not used, but are considering
Job advertisements - Print (n=35)	2.86%	20.00%	48.57%	20.00%	8.57%
Job advertisements - Online (n=37)	5.41%	32.43%	27.03%	24.32%	10.81%
Employee referrals (n=37)	32.43%	54.05%	8.11%	2.70%	2.70%
Employee and recruitment agencies (n=24)	0.00%	12.50%	33.33%	16.67%	37.50%
Word-of-mouth (n=41)	29.27%	48.78%	19.51%	0.00%	2.44%
Social media (n=27)	11.11%	40.74%	14.81%	14.81%	18.52%
Career fairs (n=28)	0.00%	17.86%	32.14%	28.57%	21.43%
Industry associations (n=20)	0.00%	5.00%	35.00%	25.00%	35.00%
High school career centers (n=33)	0.00%	18.18%	36.36%	12.12%	33.33%
University/College career centers (n=26)	3.85%	7.69%	34.62%	11.54%	42.31%

**Table 2:** Effectiveness of employee recruitment methods (n=41)

### Local workforce

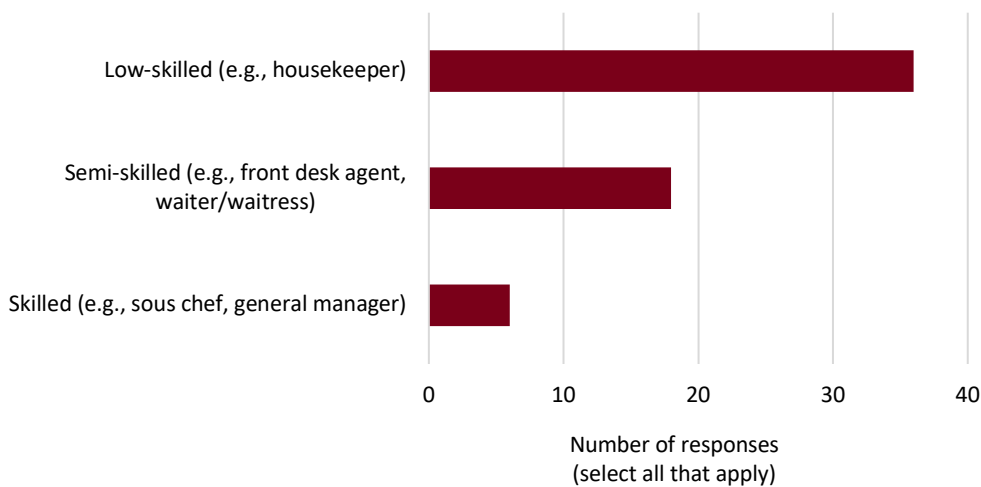
Within the local workforce, participants drew from a variety of local labor sources to fill positions (Figure 13). For year-round employment, participants primarily filled positions with family members (19 responses) followed by retirees (6 responses). Five participants indicated they hired high school students (3 responses) or college students (2 responses) for year-round employment.

Participants utilized a variety of local labor sources to fill seasonal positions. For seasonal positions, participants hired high school (32 responses) and college students (31 responses), followed by retirees (24 responses), family members (20 responses), and teachers (17 responses). In addition, 13 participants indicated they utilized additional local sources including friends, young parents, persons with disabilities, youth from church, and neighbors to fill positions.



**Fig. 13:** Local labor sources for year-round and seasonal employment (n=47)

The greatest gaps in the local labor pool were primarily in low-skilled and semi-skilled positions (Figure 14). Thirty-six participants indicated the greatest gaps were in low-skilled positions (e.g., housekeeper) followed by semi-skilled positions (e.g., front desk agent, waiter/waitress) with 18 responses. Six participants indicated skilled positions (e.g., sous chef, general manager) as the greatest gaps in the local labor pool.



**Fig. 14:** Greatest gaps in local labor pool (n=42)

### International workforce

Hiring international workers was not common practice among participants. Only two participants hired international workers using either the J-1 or F-1 visa program. Neither participant reported experiencing difficulties recruiting international workers in 2017.

## WORKFORCE CHALLENGES

Participants identified a variety of challenges in recruiting and retaining employees. The findings discussed in this report emerged from follow-up interviews and responses to open-ended survey questions directed at employee recruitment and retention challenges. Although the survey included separate questions about recruitment and retention, challenges were often discussed generally, rather than as exclusively recruitment or retention challenges. Additionally, many of the challenges identified are not unique to the tourism industry. We begin this discussion of challenges with one that is unique to the tourism industry, followed by challenges experienced by other industries and the broader community.

### Nature of tourism employment within study context

Many participants discussed challenges associated with the nature of tourism employment within the study context. Many participants offered week-long stays during their peak seasons and, as a result, much of their employment needs were limited to weekends for cabin/room turnovers. As one participant stated, it is “...difficult to hire someone who only wants to work half a day, one day a week – plus have the day be Saturday.”

Due to the seasonal nature of tourism in Cass and Crow Wing, participants found it difficult to retain employees for the entire summer. One participant explained, “*The biggest thing is just finding people that truly want to work the whole summer because most of our business is on the weekends when everybody wants to have off and get together with their friends.*” This is likely a greater challenge for lodging businesses that hire high school and college students since the summer (peak season for lodging businesses) is also students’ break from school.

Furthermore, high school and college breaks don’t necessarily align with the peak season for lodging businesses in Cass and Crow Wing. As one participant explained, “*Finding people who are able and willing to work throughout the season. Students return to school and others prefer full-time, year-round jobs.*” This creates workforce shortages, particularly towards the end of the peak summer season when most schools resume classes.

### Soft skills and employee expectations

A number of participants perceived a decline in employees’ soft skills, citing examples related to work ethic and dependability. According to one participant, “*The work ethic is just not the same as it used to be.*” Another participant commented on the generational changes stating, “*...this goes back to the work ethic thing. We’re in this age of the millennials and such that we’re... it’s just a different perspective on how you work or what’s expected.*” In addition to the perceived lack of soft skills, participants noted that employee expectations have increased and, in some cases, have become unrealistic. A participant explained, “*Dealing with unreasonable employee expectations. First-time, inexperienced workers demanding and expecting higher pay with benefits, and/or positions of which they are not qualified.*”

### Competition

Increased competition was a challenge discussed by many participants. They noted they were often competing with wages, with one stating, “*Everybody is raising the bar on wages to keep employees.*” Another aspect of this challenge was the fact that participants were not competing simply with lodging businesses, but with other businesses and industries in the community. As one participant stated, “*Unfortunately, all the businesses in the same area are looking for the same price range and labor-backed positions ... we’re all fighting over the same 30 people.*” Another participant explained, “*When Costco went in in Baxter, we lost a couple of good housekeepers to that, and that was just the tipping point. There’s too many jobs for the amount of people willing to do them.*” When discussing

future workforce challenges, one participant stated, *“I believe that with a large number of businesses opening in the Brainerd area that it will become even harder to fill positions.”*

### **Lack of workers**

The challenges associated with a lack of workers were discussed in multiple ways. First, participants indicated there is a smaller labor force and increased competition for labor. For example, one participant stated, *“There’s just more competition for the limited supply of workers.”* In addition to the limited labor force, participants perceived a general lack of interest in working, with some noticing this lack of interest particularly among youth. One participant explained, *“Kids don’t work. The college students don’t return home during the summer.”*

A lack of workers is a significant challenge for lodging businesses and is influencing their future business outlook. A participant explained the severity of the challenge, *“...it’s make or break on the micro level, and on the macro level, it can drive you crazy, because it doesn’t matter how much money you throw at it, you’re not going to get people to come work. Without workers, we can’t be a resort. It is that serious.”* Another stated, *“We are looking into selling our resort ... because we are not able to get enough help.”*

### **Aging workforce**

Several participants expressed concern about the aging workforce. They commented on the positive experiences they have had with long-time employees (some of whom are in their 70s and 80s) but are concerned younger employees will not have the same work ethic or experiences. As one participant explained, *“Many of our workers are over 70 years and will probably decide not to work anymore and their experience and dedication will be hard to replace.”*

### **Multiple responsibilities/jobs (Youth)**

There were different perspectives and experiences surrounding youth and employment. Although some participants felt youth are not interested in working, others shared a different experience. For these participants, it is not that youth lack a desire or interest in working, but that youth are already juggling multiple responsibilities, including school, extra-curricular activities and other jobs. One participant stated, *“Many young workers have more than one job to juggle as well as school.”* Another participant explained, *“Kids that can drive are so involved in sports, and they’re year-round now, so they’re not available to get a job in the summer.”* This suggests that it is not necessarily that youth lack the desire to work, but rather lack time to work.

### **Employee recruitment methods**

Traditional recruitment methods (e.g., job advertisements in newspapers, job fairs) are no longer as effective for many participants. Participants commented that job advertisements in newspapers are expensive and generate little to no response. A number of businesses participating in a job fair in Walker reported success in finding seasonal staff according to chamber of commerce representatives, but several study participants noted that job fairs are not always a good fit for lodging businesses offering seasonal and/or part-time positions. For some, job fairs were not located near them, scheduled too late for their hiring plans, or did not attract their ideal employee. As one participant who offers seasonal employment and primarily hires youth explained:

*“I think it’s partly because the people that are going through them, honestly, I don’t know if they’re all really truly looking or what they’re looking for. Again, seasonal operations, you’ll have a lot of people that come through and it’s like, “Oh, no, I’m looking for something a lot bigger and better.” The target audience doesn’t really go to them. Some of the youth or college kids aren’t going to them.”*

Participants are trying new recruitment methods, but experience difficulty in finding one that is consistently effective. As one participant explained, *“It’s hit or miss. It’s hard to tell what’s going to work well and what’s not.”*

### **Transportation**

Transportation was noted as a workforce challenge experienced by participants. Participants discussed how the lack of personal and public transportation impacts their employees’ ability to consistently show up for work. For lodging businesses located in more remote areas, the travel time and costs may deter people from pursuing employment with the business. The lack of personal transportation was sometimes connected to substance use. One participant stated, *“A lot of them, even if they’re getting on their feet from alcohol or drugs, have lost their license to drive, and so if they’re too far to walk or ride a bike or the weather’s not permissive for that, we have to find them transportation... that’s not always feasible especially if they’re way out.”*

### **Housing**

The lack of available housing and/or cost of housing were cited as barriers to recruiting and retaining employees. One participant explained, *“Housing is a big deal. The rental places up here are very sparse and expensive. And a lot of the resorts like ours, the housing we have is seasonal, so we can’t put them in a cabin because that’s a source of revenue. There’s just not enough. There’s not enough housing.”* Another participant noted, *“Walker’s kind of a high cost area and if we could find someone outside of there that would come work for us... The apartment, or condo or home is not gonna be affordable.”*

General housing challenges in the community, along with a lack of on-site employee housing, make it difficult for businesses to attract employees not currently residing in the community. It also impacts their ability to utilize programs such as the temporary nonimmigrant worker program.

### **Government benefits and assistance programs**

Many participants identified government benefits and assistance programs as a factor influencing their workforce challenges. In general, there was the perception that the benefits and assistance programs (in their current form) discourage or hinder people from obtaining employment. Some participants recalled conversations with employees who expressed concern about losing services or assistance as a result of working past a certain number of hours or income level. For example, one participant stated, *“A lot of the people, they say, ‘I’ve got these benefits, and I don’t want to lose them.’ There isn’t any of us that can survive without health insurance or anything else, and it’s just not worth it for them to jeopardize any of that.”*

Some participants anticipate the government benefits and assistance programs will continue to influence workforce challenges in the future. One participant explained, *“I do not see any improvement in the near future unless fundamental changes are made in the way county and state level assistance are administered. Multiple times potential employees state they are better off not working as they can [get] everything they need for free.”*

Although participants expressed frustration regarding this challenge, there was also an acknowledgement of the importance of these programs for individuals. Lodging businesses offering primarily seasonal, part-time employment offer limited hours and generally do not provide seasonal employees with benefits like health insurance.

### **Substance use**

Multiple participants noted a growing use of drugs and alcohol in the area and its impact on employment. Participants shared their experiences and efforts to give employees second chances. A participant explained, *“You’ll have some really great workers that, once they have a paycheck or two,*

*they go right back to their bad habits ... We give most of them two or three chances, but if they don't stick with it, we have to say, 'Sorry, we just can't deal with that up and down.' ... It's just so sad to see all the talent that's wasted there."* Another noted that, *"Many good workers, once they have money, go back to drinking and/or drugs."*

### **Workforce challenges in other states**

Informal interviews were conducted with tourism stakeholders in Maine, Michigan, Montana, South Dakota, and Wisconsin. These states were selected because they share similarities with Minnesota in terms of weather (i.e., cold climates) and/or seasonal tourism demand. Lodging businesses in these states are experiencing similar workforce challenges associated with the seasonal nature of tourism employment, high employee turnover (i.e., difficulty retaining employees), and a limited population and labor force.

## **STRATEGIES**

Lodging businesses are using a combination of traditional and new strategies to recruit and retain staff. A variety of potential strategies emerged from study participants, interviews with stakeholders in other cold-climate states, and from a scan of the literature on tourism and general seasonal employment. The strategies fall into two general categories - those that businesses can directly manage, and those that require community collaboration.

### **Employee referrals**

Many participants have found employee referrals to be an effective recruitment strategy. Some businesses noted that financial incentives are not always necessary to receive employee referrals. One participant that encourages employee referrals but have never offered incentives for referrals explained, *"We always feel if you're paying for it, you don't get as good of recommendations usually as somebody that just honestly thinks this person would be good."* Another participant shared he does not usually offer financial incentives for referrals but will do so when the business is in need of employees.

### **Using testimonials**

Similar to employee referrals, gathering and sharing testimonials from previous or current employees has the potential to attract new employees. South Suburban Parks and Recreation in Colorado experienced challenges filling seasonal positions this year (Garcia, 2018). They created short videos of employees in various departments and positions sharing why they enjoy working for the organization. One video, in particular, highlighted the career growth an employee experienced working for the organization.

Bridges Career Academies and Workplace Connection in Brainerd has a series of 'First Job' videos, in which local professionals share their first job experiences and advice for youth. The 'I Got a Job' video series focuses on the youth experiences. In these videos, youth share how they got a job in various industries and what they learned through their job. Short videos like those created by Bridges Career Academies and Workplace Connection and South Suburban Parks and Recreation can be attractive recruitment pieces that can be easily shared online and via social media.

### **Social media**

A number of participants have used social media as an effective recruitment strategy. Recruiting through social media platforms (e.g., Facebook) can reach a broad pool of potential employees. There are many community groups and pages on Facebook. Identifying relevant groups and contacting group administrators to request permission to post job openings enables a business to target recruitment efforts.



Social media can also be used by lodging businesses to keep in touch with employees during the off-season. One participant shared how she utilizes Facebook to not only post job openings, but to also maintain connections with employees during the off-season. She explained, *“We’re usually connected with most of our employees on Facebook ... we’ll say if you’re coming back, please come in now, let us know. We tell them about a month before we start hiring everybody else. We want our trained ones back first, and then we fill the gaps.”*

Understanding what social media platforms are being used by current and desired employees can reveal new employee recruitment opportunities.

### **Incentives for working the entire season**

Several participants offered employees financial incentives for working the entire season and/or returning the next season. For example, one lodging business offered housekeepers an additional four dollars for each hour worked if they worked the entire summer season. Participants currently offering similar financial incentives reported various levels of effectiveness. For some, financial incentives were effective; however, for others, it did not lead to employee retention throughout the peak season.

### **Flexibility on the employers’ part**

Due to the tight labor market, participants discussed the need to be more flexible with employees’ schedules and needs. This was especially important for employers hiring high school students, many of whom are involved in sports and extra-curricular activities that extend into summer. Participants at the Cass County community meeting discussed how some employers asked youth employees for their summer sport schedules at the beginning of the season. Identifying these periods of potential staff shortages early in the season enabled businesses to accommodate employees’ involvement in extra-curricular activities when possible, while also being proactive in finding additional help for these periods.

### **Community involvement**

Participants shared the importance and benefits of being involved in their communities and local schools. One participant explained that being involved in the local high schools served as recruitment tool, *“I got to know the kids. I knew the ones I didn’t want working for me and I knew the ones I did want working for me.”* Volunteering and mentoring students can create connections with potential employees and build awareness of employment opportunities in tourism.

### **Exploring new sources of employees**

It is clear that lodging businesses must explore new sources of employees. For many of the participants, employment needs were primarily part-time and seasonal, which work well for some individuals. As one participant explained, *“One of the benefits of the tourism or hospitality industry is that it’s a good place to get second jobs if people need that or to work two days a week.”* Similarly, the U.S. Travel Association (2017) highlights the benefits of part-time employment in the tourism industry in that it “offers [Americans] the opportunity to enhance their skills and further their education” (p. 14). Connecting with individuals who will benefit from part-time employment and communicating those benefits can help potential employees see the value of tourism employment.

According to the Center for Rural Policy and Development (2015), the senior population in both Cass and Crow Wing County is expected to grow by 22.0 to 37.9 percent between 2015 and 2025. A significant population increase, coupled with changing retirement trends, suggest an opportunity to engage the seniors extensively in the area workforce. Seniors today are often planning a long glide into retirement that involves downscaling their current job or switching to work that is less demanding on their time and/or physical well-being that they can take continue past age 65. In

Economic Development Region 5 – North Central (which includes Cass, Crow Wing, Morrison, Todd and Wadena counties), 72 percent of individuals 65 to 69 years of age in the workforce are employed part-time (U.S. Census Bureau, 2016). That number increases to 80 percent for individuals 70 years and older. Retirement plans may also include a move to their desired retirement location while they are still working. The majority of seasonal residents surveyed by the University of Minnesota Extension plan to transition permanently to their second home (Pesch & Bussiere, 2014). For seniors planning a long glide into retirement, part-time employment in the vicinity of their retirement property may be appealing. Employment in the tourism industry is well-suited for their needs, particularly in Cass and Crow Wing Counties, which are popular retirement destinations.

In addition to the large number of seniors expected to migrate to the region over the next ten years, recent history suggests that people of other age groups migrate to Cass and Crow Wing Counties on a regular basis. Among those 25 to 44 years of age, the area welcomed 452 more residents than it lost from 2010-2015. As a middle-age cohort, these newcomers often bring work experience, education, and a higher level of maturity to the workforce.

These numbers include those migrating domestically and internationally, otherwise known as immigrants. Since 2010, over 200 foreign-born individuals have moved to the Cass/Crow Wing County area. In both counties, the foreign-born population is significantly younger than the overall population. In Crow Wing County specifically, over one-third of the foreign-born population is 25 to 34 years of age.

Additional groups that may value or benefit from seasonal and/or part-time employment are people with disabilities and workampers. Vocational Rehabilitation Services within the Minnesota Department of Employment and Economic Development can provide resources and advise on hiring people with disabilities. A workamper is “anyone who combines part or full-time work with an RV lifestyle” (Chatzky, 2017, para. 3). Workampers travel around the United States in RVs and do seasonal work in a variety of industries including agriculture, recreation and tourism. The University of Minnesota Tourism Center is beginning to conduct research to better understand workampers, their needs, and potential barriers to utilizing this workforce in Minnesota.

As lodging employers explore new pools of potential employees, it will be important to understand the needs and potential barriers of these new employees, and to find ways to build positive working experiences for both the employer and employee. This may require adopting new recruitment and retention strategies or adapting business operations.

### **High school and college students**

Due to the seasonal nature of tourism in Cass and Crow Wing counties, high school and college students are often hired to work during the peak summer season. One potential source in which to recruit local high school students is the regional Bridges Career Academies and Workplace Connection’s Career Depot ([www.bridgesconnection.org](http://www.bridgesconnection.org)). Businesses interested in hiring high school students between the ages of 14 and 18 can post jobs for free on the Bridge’s Career Depot.

When recruiting youth and younger adults, businesses should consider highlighting the skills students can gain from hospitality and tourism employment. High school students are likely considering future education or career goals and are taking into account how different types of employment or extra-curricular opportunities will help them achieve their educational or career goals. When recruiting high school and college students, participants should highlight how their business can provide students with skills and experiences that will make them more marketable to schools or employers.

Many industries, including tourism and hospitality, see a growing demand for soft skills. Some of the highly desired soft skills include communication, courtesy, flexibility, integrity, interpersonal skills, positive attitude, professionalism, responsibility, teamwork and work ethic (Robles, 2012). The hospitality and tourism industry can help develop and build these soft skills. Furthermore, offering opportunities to build soft skills can help build employee engagement and encourage younger staff to see current positions as a career step.

A unique selling point highlighted during the community meetings and in interviews with participants was the opportunity for employees to work closely with lodging business owners. As one local resort owner explained, *“The uniqueness of the resort side of it was that in almost all cases, [employees] were working alongside of the owners of the business. So they were learning more things.”*

Creating internship opportunities that enable young adults to build skills and interact with business owners is beneficial to both student interns and businesses. According to Maertz, Stoeberl, and Marks (2014), “by performing job tasks and spending time with professionals within one’s desired career area, internships provide students with the opportunity to gain knowledge about careers within an industry, identify general work-related preferences, and develop deeper vocational interests” (p. 126). For employers, internships can be beneficial in the recruitment process by “...providing a low-cost, low-risk opportunity for employers to evaluate interns as prospective employees, even as they contribute productive work” (Maertz et al., 2014, p. 131).

There are a number of existing efforts in Minnesota that are helping to build the next generation of tourism employees and leaders. Hospitality Minnesota, Minnesota Resort and Campground Association, and Community of Minnesota Resorts all offer scholarships to students affiliated with the organization/industry and/or pursuing education related to the industry.

Several study participants noted they support and engage with existing hospitality programs in the area. For example, select high schools in Minnesota currently offer the Hospitality and Tourism Management Program and/or ProStart (a two-year program for high school students interested in restaurants and foodservice). Engaging with these and other similar programs offer businesses the opportunity to provide students with insight into business operations and career opportunities. Furthermore, businesses can also help shape curriculum by providing input on industry needs.

### **International workers**

Some participants expressed an interest in utilizing temporary nonimmigrant worker programs and/or summer work travel programs but are limited by the lack of housing both on-site and in the community. Participants were also concerned about potential language barriers and the timing of the programs. For some, the dates of the J-1 and H-2B visa programs don’t necessarily align with their tourism season and employment needs. Due to the complexity of these programs, businesses are encouraged to reach out to program sponsors and agencies specializing in these programs for information and guidance.

### **Partnering with businesses that have opposite or complementary employment needs**

Since many businesses are struggling to find employees to fill open positions, businesses are encouraged to consider partnering with other businesses that have opposite or complementary employment needs. For example, some participants are exploring potential partnerships with resorts in destinations where winter is the peak season. This would allow lodging businesses with opposite peak seasons to share employees; however, a lack of housing presents challenges to implementing this strategy in Cass and Crow Wing counties.

There are also potential opportunities to partner with local businesses who have complementary employment needs. One suggestion shared at the community meetings was staggering check-in and

check-out dates with nearby resorts or campgrounds. For example, one resort would do Friday to Friday stays while another offers Saturday to Saturday stays. This would allow employers to share employees and increase employment opportunities.

Helping employees find work during the off-season is another opportunity to support employees and other local businesses. One participant shared, *“We try to help [our employees] find jobs if they’re having issues in the winter. It’d be kind of nice to have a more firm network on places ... because we feel our employees are great, so we’d like to recommend them.”* Developing these types of collaborations can help retain seasonal employees and develop goodwill among regional partners.

### **Community collaboration**

Participants’ workforce challenges were often influenced by community-wide challenges such as the lack of housing and transportation, substance use, and challenges with the government benefits and assistance programs. Some of these challenges are larger policy issues that require broader conversations with elected officials and community partners. Collaborating with community partners and businesses to develop long-term strategies addressing these challenges will benefit individual tourism businesses as well.

Attendees at the community meetings shared ideas of shorter-term strategies to address the lack of housing and transportation for employees. Some participants discussed putting out a call for housing in the community to host employees. Residents with a spare bedroom or a ‘mother-in-law’ apartment may be able to host or rent these units to seasonal employees. Employees who live in the community may also be willing to offer housing to seasonal employees.

In regards to transportation, attendees at the community meetings suggested exploring the use of ridesharing services (e.g., Uber, Lyft) and creating opportunities for school bus drivers during the summer. Attendees also suggested businesses encourage and/or help facilitate carpooling arrangements for employees.

A factor influencing workforce challenges for many participants was the government benefits and assistance programs. As discussed earlier, there is a perception among participants that the benefits and assistance programs (in their current form) discourages or hinders people from obtaining employment. Some participants recalled conversations with employees who expressed concern about losing benefits or assistance as a result of working past a certain number of hours or income level. This is commonly understood as the “benefits cliff.” According to Kaz (2015), the ““benefits cliff” is a term that describes what happens when public benefits programs phase down or out quickly, leading to an abrupt reduction or loss of benefits for families as households increase, but have not increased enough for self-sufficiency to be reached” (p. 2).

Different understandings of the programs and qualifications emerged in interviews and discussions at the community meetings. Connecting with regional offices of the Department of Human Services will help business owners/managers better understand these programs and the implications for both employees and businesses. This can help businesses develop effective strategies to employ those receiving government benefits or assistance.

## CONCLUSION

This qualitative study documented current workforce challenges and strategies used by lodging businesses in Cass and Crow Wing counties. Community meetings were held to share study findings and facilitate conversations on shared challenges and potential strategies. Sharing the strategies used by both large and small businesses to address common challenges was valuable to attendees.

Findings of this study can be used by lodging businesses, community organizations and elected officials to inform decision-making, encourage collaboration and build resilient partnerships. As noted in this study, many workforce issues are complex and affect communities well beyond the local tourism industry. Bringing together businesses and community partners will be critical to addressing workforce challenges. A positive immediate outcome of this study is that the directors of several regional chambers of commerce have stepped forward to offer opportunities to continue the dialogue.

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## **APPENDIX A: SURVEY**

### **Welcome and Consent Information**

You are invited to participate in a research study exploring the tourism lodging workforce challenges in Cass and Crow Wing counties in Minnesota. The purpose of this study is to gain an overview of the current and future workforce challenges facing the tourism sector in Cass and Crow Wing counties, examine regional models, and identify long-term, sustainable strategies to maintain tourism as part of the region's economy. You were selected as a possible participant in this study because you own or manage a tourism lodging business located in Cass or Crow Wing County.

#### **PARTICIPATION**

Completion of the survey should take approximately 20 minutes. Participation in this survey is voluntary. If you choose to take part in the research, you have the right to stop at any time and it will not be held against you. You may skip any questions you do not wish to answer for any reason.

#### **BENEFITS AND RISKS**

We cannot promise any benefits to you or others from taking part in this research. However, your responses will provide insight into current and future workforce challenges experienced by the tourism industry in Cass and Crow Wing counties. Findings will inform long-term, sustainable strategies to maintain tourism as part of the region's economy.

There are no known or anticipated risks associated with participation in the study.

#### **CONFIDENTIALITY**

Efforts will be made to limit the use and sharing of your personal research information to people who have a need to review this information. Organizations that may inspect and copy records about this research include the Institutional Review Board (a committee that reviews and approves research studies) and other representatives of this institution.

Your survey responses will be stored initially with Qualtrics in a password-protected electronic format. Data will be downloaded and stored in password-protected files. In the event of any publication or presentation resulting from the research, no personally identifiable information will be shared.

At the end of the survey, you will be given the option to participate in a follow-up interview. If you choose to provide contact information, your survey responses may no longer be anonymous to the researchers. However, no names or personally identifiable information will be included in any publications or presentations based on the data, and your responses to this survey will remain confidential.

#### **CONTACT INFORMATION**

If you have questions or concerns about the research study, please contact the research team:

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Please select your choice below. Agreeing to participate indicates that:  
You have read the above information  
You voluntarily agree to participate in the research study  
You are 18 years of age or older

- I agree to participate
- I decline to participate

### Screening Question

In which county is your business located?

- Cass
- Crow Wing
- Both Cass and Crow Wing
- Other

*If 'Other' is selected, end survey with 'thank you for your participation' message.*

### Background Questions

Which of the following best describes your business?

- Resort
- Hotel/Motel
- B&B/Historic Inn
- Campground
- Other (please specify)

*If response to previous question includes the following: Resort, Hotel/Motel, B&B/Historic Inn, OR Other:*

How many rentable indoor units/bedrooms does your property have in total?

*If response to previous question includes Campground:*

How many rentable campsites does your property have in total?

How long have you been in business?

- 0-4 years
- 5-9 years
- 10-14 years
- 15-19 years
- 20 or more years

Is your business a year-round or seasonal operation?

- Year-round
- Seasonal
- Both (please explain)

In addition to lodging/camping, do you offer additional services or amenities (e.g., food service, recreation activities/rentals, entertainment, gaming)?

- Yes
- No



**Recruitment/Hiring: General**

Indicate the months comprising your peak and shoulder seasons as well as the months in which you have minimal demand or you are closed for business.

(Drag and drop the months in their respective category)

January	Peak season (high demand)
February	
March	
April	
May	Shoulder season (lower demand)
June	
July	
August	
September	Minimal demand or business is closed
October	
November	
December	

During full operation, how many paid staff do you have (including yourself and family members)?

Indicate your level of need for employees throughout the year.

(Drag and drop the months in their respective categories)

January	High need for employees
February	
March	
April	
May	Low need for employees
June	
July	
August	
September	Minimal or no need for employees
October	
November	
December	

Select the months in which you experience the greatest difficulty filling open positions.

(Select up to four months)

- January
- February
- etc.

To supplement your workforce, do you regularly employ contractors to fulfill operational requirements (e.g., housekeeping services, grounds maintenance)?

- Yes
- No

Do you offer employment in which wages are not the primary form of compensation? For example, instead of wages, compensation is primarily in the form of housing, meals, etc.

- Yes
- No

What positions do you have the most difficulty filling? Please explain why and note whether the position is seasonal or year-round.

Open-ended response

**Recruitment/Hiring: Local Workforce**

What **local** labor sources (or demographics) do you draw from to fill positions?

	<b>Year-round employment</b>	<b>Seasonal employment</b>
Family members	<input type="checkbox"/>	<input type="checkbox"/>
High school students	<input type="checkbox"/>	<input type="checkbox"/>
College students	<input type="checkbox"/>	<input type="checkbox"/>
Teachers	<input type="checkbox"/>	<input type="checkbox"/>
Retirees	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>

What are the greatest challenges in filling positions with **local** labor?  
Open-ended response

Where are the greatest gaps in the **local** labor pool?

- Low-skilled (e.g., housekeeper)
- Semi-skilled (e.g., front desk agent, waiter/waitress)
- Skilled (e.g., sous chef, general manager)

**Recruitment/Hiring: International Workforce**

Have you hired international workers?

- Yes
- No

IF response to previous question is YES:

What visa programs have you used?

(check all that apply)

- J-1
- H-2B
- F-1
- Other (please specify)

What percentage of your peak employment staff are international workers?

In 2017, did you experience difficulties recruiting international workers (e.g., visa process, cultural difference)?

- No
- Yes (please explain the difficulties you experienced and how they were similar or different from other recent years)

**Recruitment**

How effective have you found the following methods for **recruiting** employees?

	Very effective	Effective	Ineffective	Very ineffective	Have not used, but are considering	N/A
Job advertisements - Print	•	•	•	•	•	•
Job advertisements - Online	•	•	•	•	•	•
Employee referrals	•	•	•	•	•	•
Employee and recruitment agencies	•	•	•	•	•	•
Word-of-mouth	•	•	•	•	•	•
Social media	•	•	•	•	•	•
Career fairs	•	•	•	•	•	•
Industry associations	•	•	•	•	•	•
High school career centers	•	•	•	•	•	•
University/College career centers	•	•	•	•	•	•
Other (please specify)	•	•	•	•	•	•
Other (please specify)	•	•	•	•	•	•
Other (please specify)	•	•	•	•	•	•



What benefits or incentives do you offer to employees?

Benefit/Incentive	Year-round, Full-time	Year-round, Part-time	Seasonal, Full-time	Seasonal, Part-time
Medical insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Paid leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retirement plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial incentives (e.g., bonuses)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Returning bonus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use of facilities or amenities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other benefit or incentive (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other benefit or incentive (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other benefit or incentive (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In the last two years, have you increased wages more than you normally would in order to **recruit and hire** employees?

- Yes
- No

What challenges are you currently experiencing in **recruiting** employees?

Open-ended response

In the next five years, what challenges do you think you will experience in **recruiting** employees?

Open-ended response

### Retention

What strategies do you currently use to **retain** employees?

Open-ended response

What new employee **retention** strategies are you considering?

Open-ended response

What challenges are you currently experiencing in **retaining** employees?

Open-ended response

In the last two years, have you increased wages more than you normally would in order to **retain** employees?

- Yes
- No

In the next five years, what challenges do you think you will experience in **retaining** employees?

Open-ended response

### Concluding Questions

What information or resources would help you address employee recruitment and retention strategies?

Open-ended response

Are you willing to participate in a follow-up interview? If yes, please provide the following contact information:

Name: \_\_\_\_\_

Business: \_\_\_\_\_

Email: \_\_\_\_\_

Phone number: \_\_\_\_\_



**APPENDIX B: AREA WORKFORCE REPORT (MINNESOTA DEPARTMENT OF EMPLOYMENT AND ECONOMIC DEVELOPMENT)**

Report begins on the next page

**CASS & CROW WING COUNTY, MN**

**DEMOGRAPHICS**

Crow Wing County and Cass County are located in Economic Development Region 5– North Central (EDR 5) along with Morrison, Todd and Wadena Counties. The population of Crow Wing County was 63,940 in 2016, after growing by 16 percent since 2000. That made it the most populous and fastest growing county in the region from 2000-2016. Cass County also grew from 2000-2016, but at the lower rate of 6.8 percent. Together, the two county area added an estimated 10,684 residents from 2000-2016 (see Table 1). The recent population increase is part of a long-term trend in the area, where the combined county population increased by 44,079 since 1960.

Area	Population	1960-2016 Population Change		2000-2016 Population Change	
		Numeric	Percent	Numeric	Percent
Cass County	28,993	12,273	73.4%	1,843	6.8%
Crow Wing County	63,940	31,806	99.0%	8,841	16.0%
<b>Total</b>	<b>92,933</b>	<b>44,079</b>	<b>90.2%</b>	<b>10,684</b>	<b>13.0%</b>

*Source: U.S. Census Bureau*

**POPULATION BY AGE GROUP**

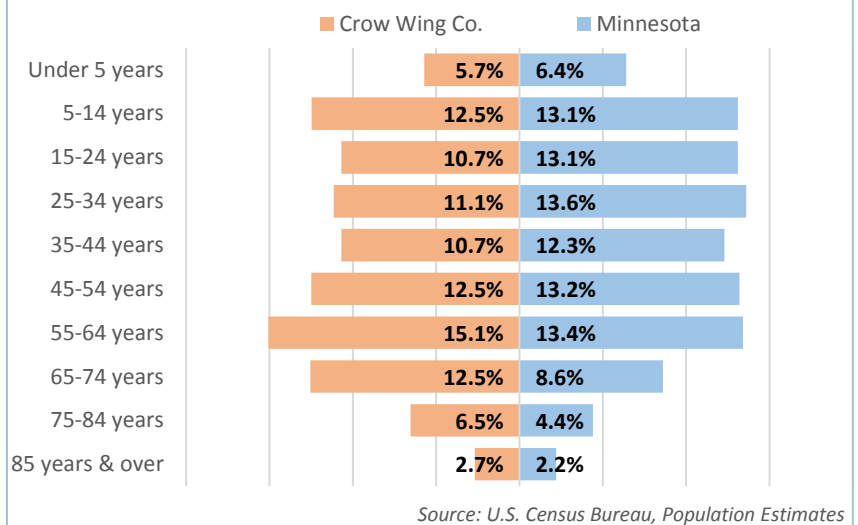
The populations of both Crow Wing and Cass counties are significantly older than the state.

In Crow Wing County, 21.7 percent of the population was over 65 years of age in 2016, compared to 15.2 percent statewide. Crow Wing also had a higher percentage of people in the 45 to 64 year old age group, which made up 27.6 percent of the county population. In contrast, it had a much smaller percentage of people in the 25 to 44 year age group- those typically considered the ‘prime working years’ (see Figure 1).

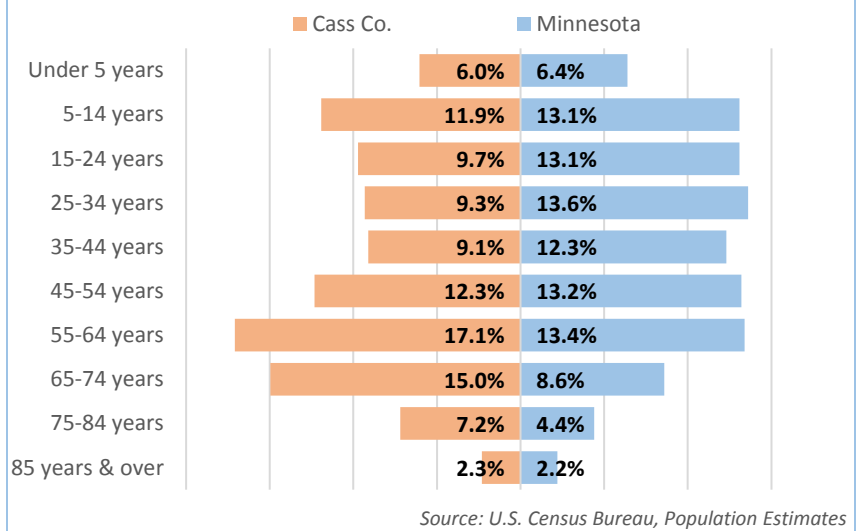
The population of Cass County is older still, where 24.5 percent of the population is over 65 years of age, and over half of the population is over 45 years of age. In addition, Cass County had an even smaller percentage of residents 25 to 44 years of age, which accounted for less than 20 percent. Statewide, nearly 26 percent of the population was in their ‘prime working years’ - more than both counties (see Figure 2).

A large portion of the area’s population is part of the Baby Boom generation, or those born between 1946 and 1964, which is creating a significant shift in local demographics. However, both counties continue to grow in population; 35-44 years was the only age range with a significant decline from 2000 - 2016.

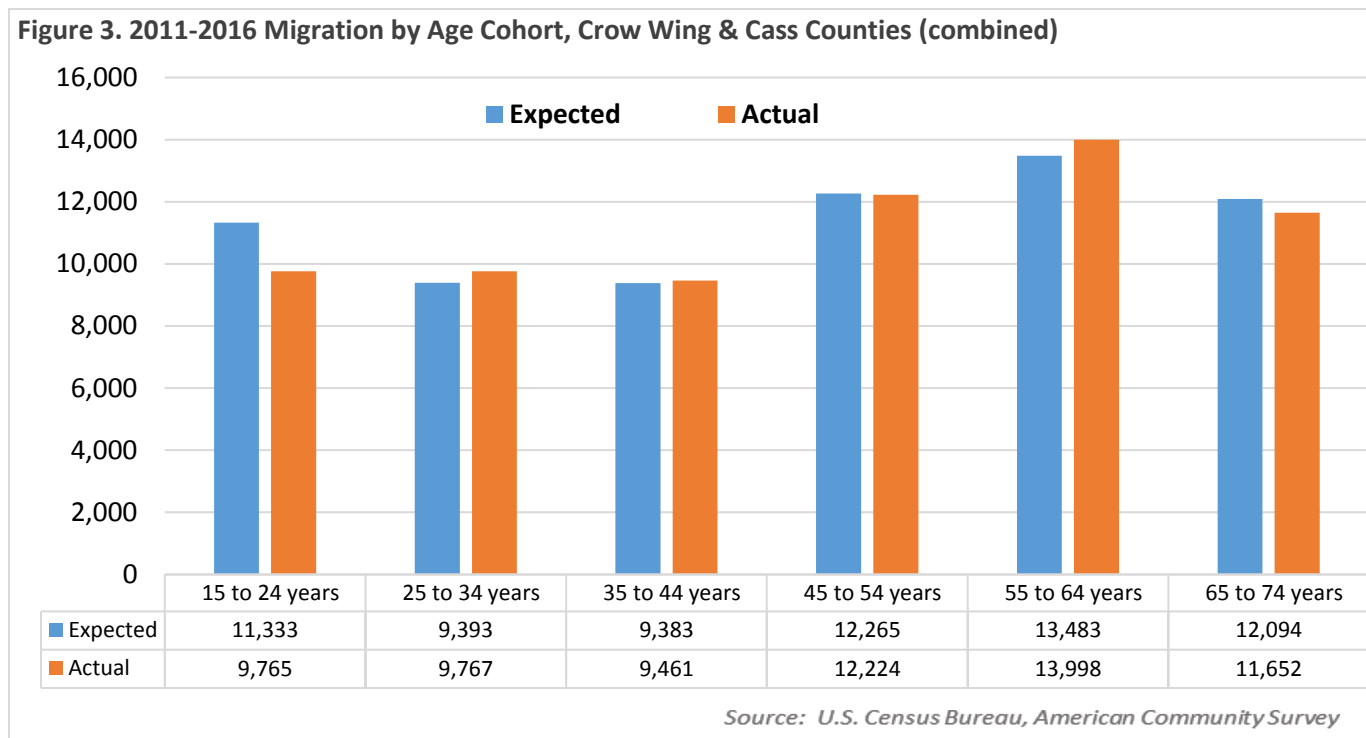
**Figure 1. Percentage of Population by Age Group, 2016**



**Figure 2. Percentage of Population by Age Group, 2016**



Some of the demographic change in Crow Wing and Cass counties is driven by in and out migration. For example, data shows that the region had net in-migration of approximately 450 people 25-44 years of age (see Figure 3). So while a good portion of the established population aged out of the 'prime working years', the region is drawing others to fill some of the void. From 2011-2016, the combined region also had positive net in-migration among those 55 to 64 (+515). Those 15-24 years of age were most likely to migrate out of the combined area (-1,568).



**POPULATION BY RACE AND ETHNICITY**

Crow Wing County is less ethnically diverse than the state. In 2016, 94.3 percent of county residents reported their race as *White Alone*, compared to 84.3 percent of residents statewide. Cass County was much more diverse in terms of race. As home of the Leech Lake Band of Ojibwa, over 11 percent of the Cass County population was *American Indian or Alaskan Native*. Having grown by over 125 percent from 2000-2016, the *Hispanic or Latino* population was the next largest in Cass County at nearly 1,400 residents. Only about a half a percent of area residents were *Black or African American*, and *Asian or Other Pacific Islanders* (see Table 2). Despite their relatively small populations in the area, their populations more than doubled in both counties from 2000-2016.

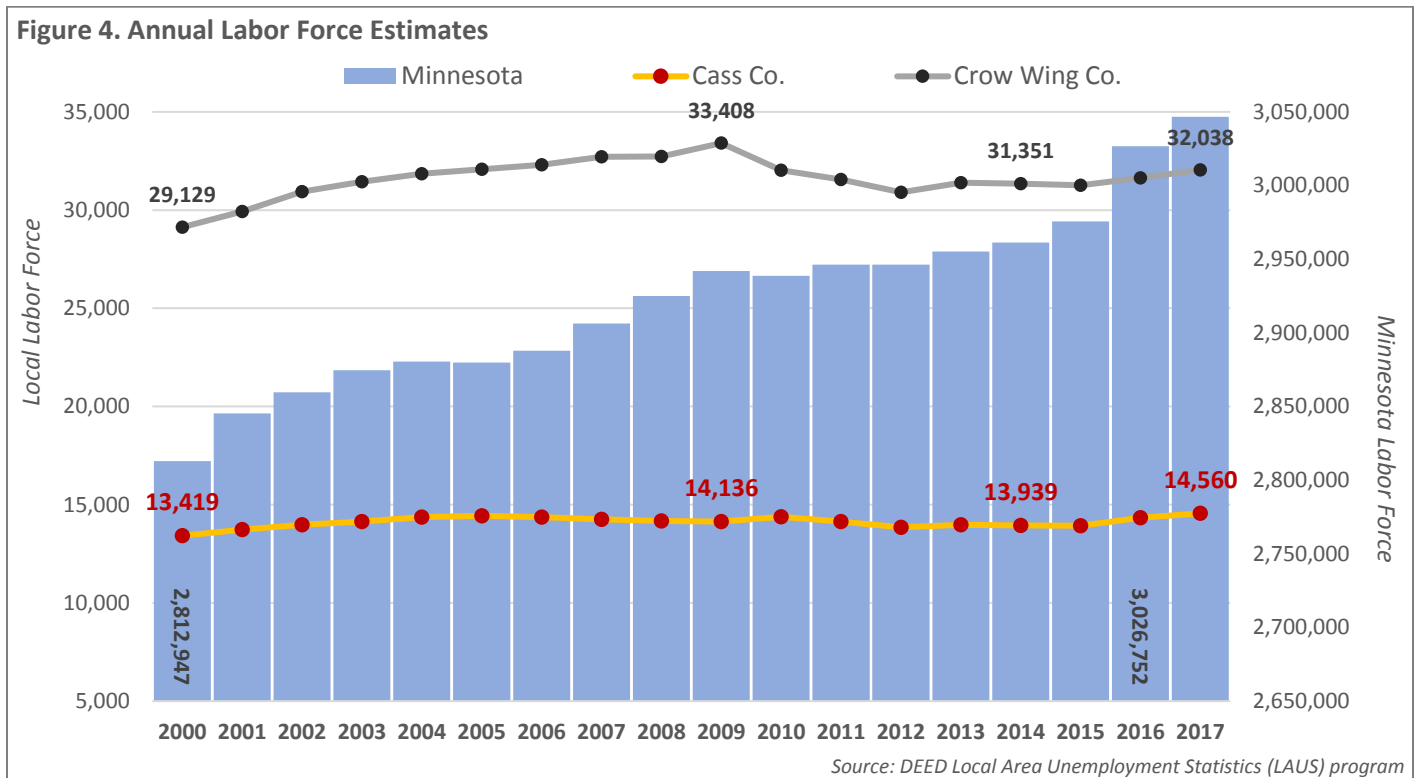
Table 2. Race and Ethnic Origin, 2016	Crow Wing County			Cass County		
	Number	Percent	Change 2000-2016	Number	Percent	Change 2000-2016
<b>Total</b>	<b>63,321</b>	<b>100.0%</b>	<b>14.9%</b>	<b>28,633</b>	<b>100.0%</b>	<b>5.5%</b>
White	60,995	96.3%	13.4%	24,315	84.9%	3.5%
Black or African American	389	0.6%	128.8%	100	0.3%	222.6%
American Indian & Alaska Native	747	1.2%	74.1%	3,174	11.1%	2.1%
Asian & Other Pac. Islander	288	0.5%	81.1%	179	0.6%	118.3%
Some Other Race	46	0.1%	-58.9%	36	0.1%	-5.3%
Two or More Races	856	1.4%	100.0%	829	2.9%	107.8%
Hispanic or Latino	860	1.4%	125.7%	521	1.8%	136.8%

Source: U.S. Census Bureau, American Community Survey



**LABOR FORCE CHANGE, 2000-2017**

According to data from DEED’s [Local Area Unemployment Statistics](#) program, the labor markets in both Cass and Crow Wing Counties have fluctuated in response to changing economic conditions since 2000. During the recessions in both 2001 and 2009, workers flooded into the labor market to earn extra income – particularly in Crow Wing County. Since then, Crow Wing County lost nearly 1,200 workers, while Cass County’s labor force remained approximately the same size. Still, the combined area had approximately 4,000 more available workers in 2017 than in 2000, including an additional 632 workers last year alone. Due to the economic recovery and local demographic changes, the regional labor market is tightening significantly. Last year, there was an average of 2,356 active jobseekers in the combined area compared to 4,721 –over twice as many- on average in 2009 (see Figure 4).



**LABOR FORCE PROJECTIONS, 2020-2030**

Despite projected population growth in both counties, applying current labor force participation rates to population projections by age group shows a one percent decrease in county workforce numbers over the next decade (see Table 3).

Again, the demographic shift will affect the area labor force numbers significantly. Despite large gains in workers aged 20 to 44, the decline in the number of workers aged 45 to 64 was even greater. In total, the combined region may lose over 2,900 workers in the 45 to 64 year old age group as the last of Baby Boom generation leaves the workforce. Given this, the 25 to 44 year old age group is set to become the largest part of the area labor force, and account for approximately 40 percent of the total by 2030 (see Table 3). Overall, the labor market will remain tight in the foreseeable future, requiring long-term workforce planning from regional employers and communities alike.

	2020 Labor Force Projection	2030 Labor Force Projection	2020-2030 Change	
			Numeric	Percent
16 to 19 years	2,822	2,604	-218	-7.7%
20 to 24 years	5,062	5,977	+915	18.1%
25 to 44 years	15,629	17,193	+1,564	10.0%
45 to 54 years	8,071	7,637	-434	-5.4%
55 to 64 years	8,307	5,800	-2,507	-30.2%
65 to 74 years	2,488	2,473	-15	-0.1%
75 years & over	658	954	+296	45.0%
<b>Total Labor Force</b>	<b>43,037</b>	<b>42,638</b>	<b>-399</b>	<b>-0.9%</b>

Source: calculated from [MN State Demographic Center projections](#), and [2012-2016 American Community Survey 5-Year Estimates](#)

**EMPLOYMENT CHARACTERISTICS**

With just 61.3 and 56.4 percent of the population aged 16 years and over in the labor force, respectively, Crow Wing and Cass counties have much lower labor force participation rates than the statewide rate of 69.9 percent (see Table 4). Both counties had lower labor force participation rates than the state in most age groups as well. Those 16 to 24 years in Crow Wing County were a notable exception. Overall, the participation rates are pulled down by those over 45 years of age, whose participation in the area vary the most compared to statewide averages, yet they account for a higher proportion of the population and labor force than what is typically found in Minnesota.

Cass County has lower participation rates than the state in several race groups, and unemployment disparity persists. Hispanic workers were the only measurable ethnic minority with an unemployment rate under 10 percent. In contrast, disparities among ethnic minority populations in Crow Wing County shrunk significantly from 2015-2016. The combined area also had about 2,350 veterans and 2,500 workers with disabilities in the labor force. In sum, unemployment in the area is highest for young people, American Indians, Hispanic or Latino workers, and those with disabilities.

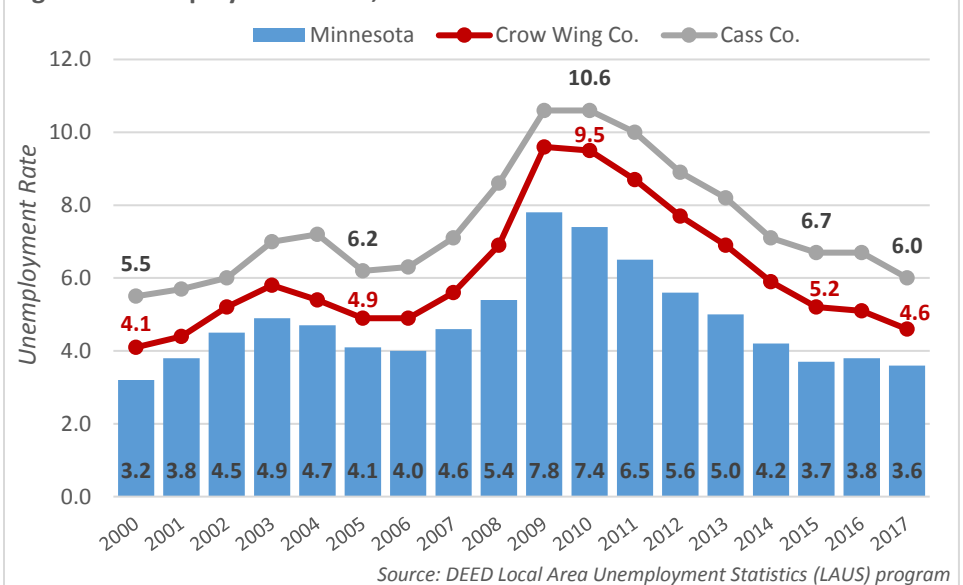
Table 4. Employment Characteristics, 2016						
	Crow Wing Co.			Cass Co.		
	In Labor Force	Labor Force Partic. Rate	Unemp. Rate	In Labor Force	Labor Force Partic. Rate	Unemp. Rate
<b>Total Labor Force</b>	<b>31,162</b>	<b>61.3%</b>	<b>4.3%</b>	<b>13,074</b>	<b>56.4%</b>	<b>6.3%</b>
16 to 19 years	1,512	54.8%	7.2%	582	50.7%	20.6%
20 to 24 years	2,955	87.1%	7.2%	1,082	80.8%	10.3%
25 to 44 years	12,087	86.6%	5.0%	4,470	84.3%	6.6%
45 to 54 years	7,010	83.7%	3.0%	3,203	83.1%	4.6%
55 to 64 years	5,867	63.2%	3.4%	2,717	57.3%	5.2%
65 to 74 years	1,433	19.2%	1.4%	845	20.2%	1.4%
75 years & over	303	5.4%	0.0%	183	7.0%	1.1%
<b>Employment Characteristics by Race &amp; Hispanic Origin</b>						
White alone	30,315	61.4%	4.2%	11,412	55.8%	4.7%
Black or African American	220	76.4%	1.8%	35	53.8%	20.0%
American Indian & Alaskan	264	52.8%	13.3%	1,243	59.6%	19.5%
Asian or Other Pac. Islands.	106	42.2%	2.8%	70	59.3%	0.0%
Some Other Race	31	67.4%	32.3%	25	86.2%	0.0%
Two or More Races	253	66.9%	4.0%	293	68.0%	12.5%
Hispanic or Latino	454	77.5%	11.8%	161	57.1%	6.8%
<b>Employment Characteristics by Veteran Status</b>						
Veterans, 18 to 64 years	1,508	63.5%	4.4%	857	69.1%	8.3%
<b>Employment Characteristics by Disability</b>						
With Any Disability	1,557	42.1%	7.1%	928	45.2%	11.5%
<b>Employment Characteristics by Educational Attainment</b>						
Population, 25 to 64 years	24,968	79.0%	4.0%	10,387	74.7%	5.6%
Less than H.S. Diploma	1,061	68.3%	5.3%	641	60.2%	7.4%
H.S. Diploma or Equivalent	6,088	70.2%	2.3%	3,139	71.3%	5.9%
Some College or Associates	11,115	81.7%	3.6%	4,418	78.2%	5.0%
Bachelor's Degree or More	6,701	86.2%	2.9%	2,196	78.7%	3.2%

Source: 2012-2016 American Community Survey, 5-Year Estimates

**UNEMPLOYMENT RATES**

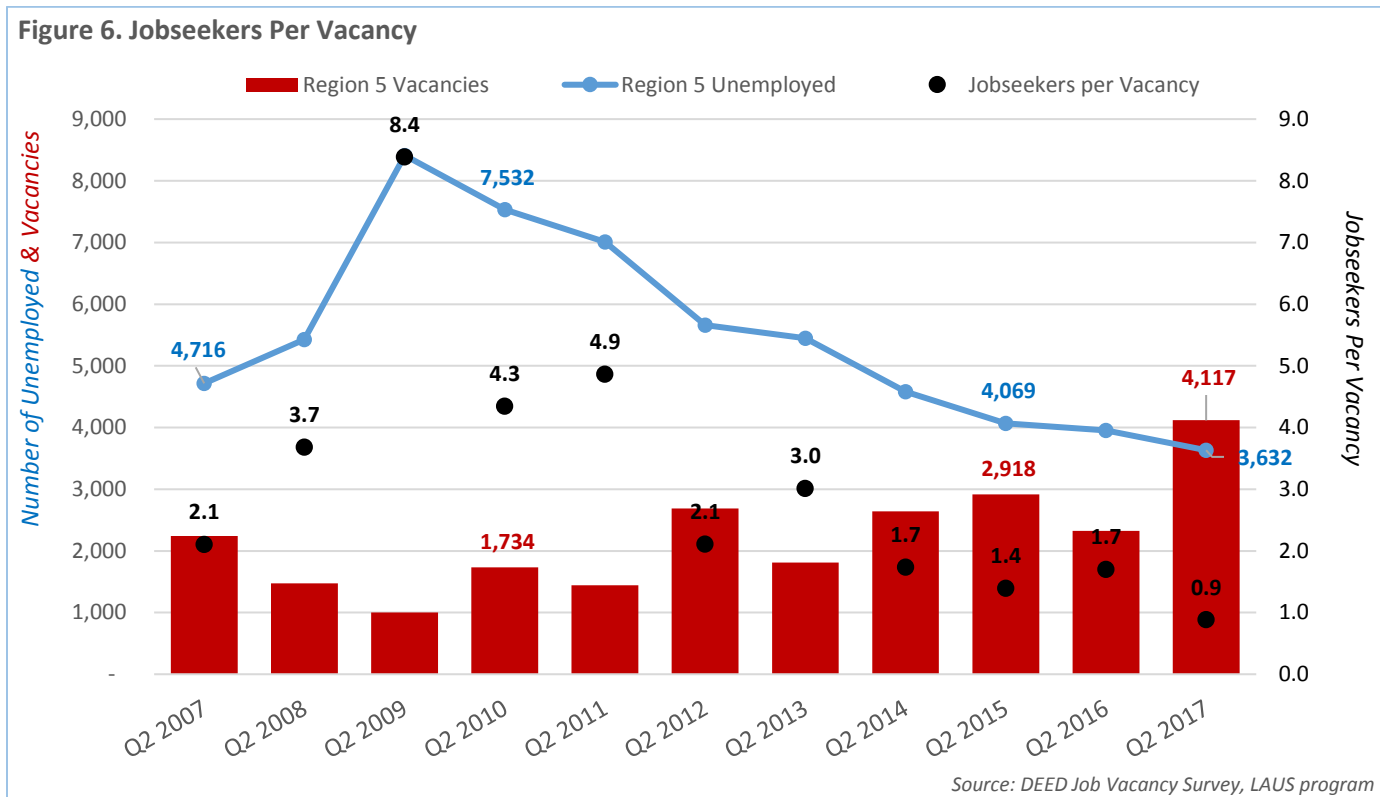
Cass and Crow Wing counties consistently have among the highest unemployment rates in the state, typically hovering at least 1 to 3 percent above the state rate. According to DEED's [Local Area Unemployment Statistics](#), the region's unemployment rate was highest in 2009. Since then, the state and regional economies recovered and unemployment rates dropped below pre-recession levels. In 2017, Crow Wing had 4.6 percent unemployment, compared to 6.0 percent in Cass County, which were the lowest unemployment rates in both counties since 2001 (Figure 5).

Figure 5. Unemployment Rates, 2000-2016



Source: DEED Local Area Unemployment Statistics (LAUS) program

As stated, Crow Wing County and Region Five’s labor market have tightened dramatically during the economic recovery. The recent increase in vacancies has closed in on the number of unemployed workers in Region Five, leading to a 1.8-to-1 ratio of unemployed jobseekers per vacancy. As recently as 2016 Q4, the regional job vacancy survey (which is not available at the County level) estimates there were 2,325 openings in Region Five compared to 4,052 unemployed jobseekers in the region. The ratio climbed as high as 8.4-to-1 in the depths of the recession in 2009, but has steadily declined since (see Figure 6).



**COMMUTE SHED AND LABOR SHED**

Home to Brainerd and Baxter, Crow Wing County is the largest county, largest employment center, and the biggest draw for workers in the region. Cass County, in comparison, had less workforce inflow and outflow. Employers in the area both lose and draw workers from nearby counties like Stearns, Beltrami, Hubbard, Morrison, Itasca and Aitkin counties. The largest net outflow goes into Hennepin County, although many of these workers may actually telecommute. Stearns County most likely draws the highest number of traditional commuters from the area (see Table 7 and Figure 9).

**Table 6. Region 5 Inflow/Outflow Job Counts (All Jobs), 2014**

	2015	
	Count	Share
Employed in the Selection Area	38,409	100.0%
Employed in the Selection Area but Living Outside	11,268	29.3%
Employed and Living in the Selection Area	27,141	70.7%
<b>Living in the Selection Area</b>		
Living in the Selection Area	39,854	100.0%
Living in the Selection Area but Employed Outside	12,713	31.9%
Living and Employed in the Selection Area	27,141	68.1%

Source: U.S. Census Bureau, OnTheMap

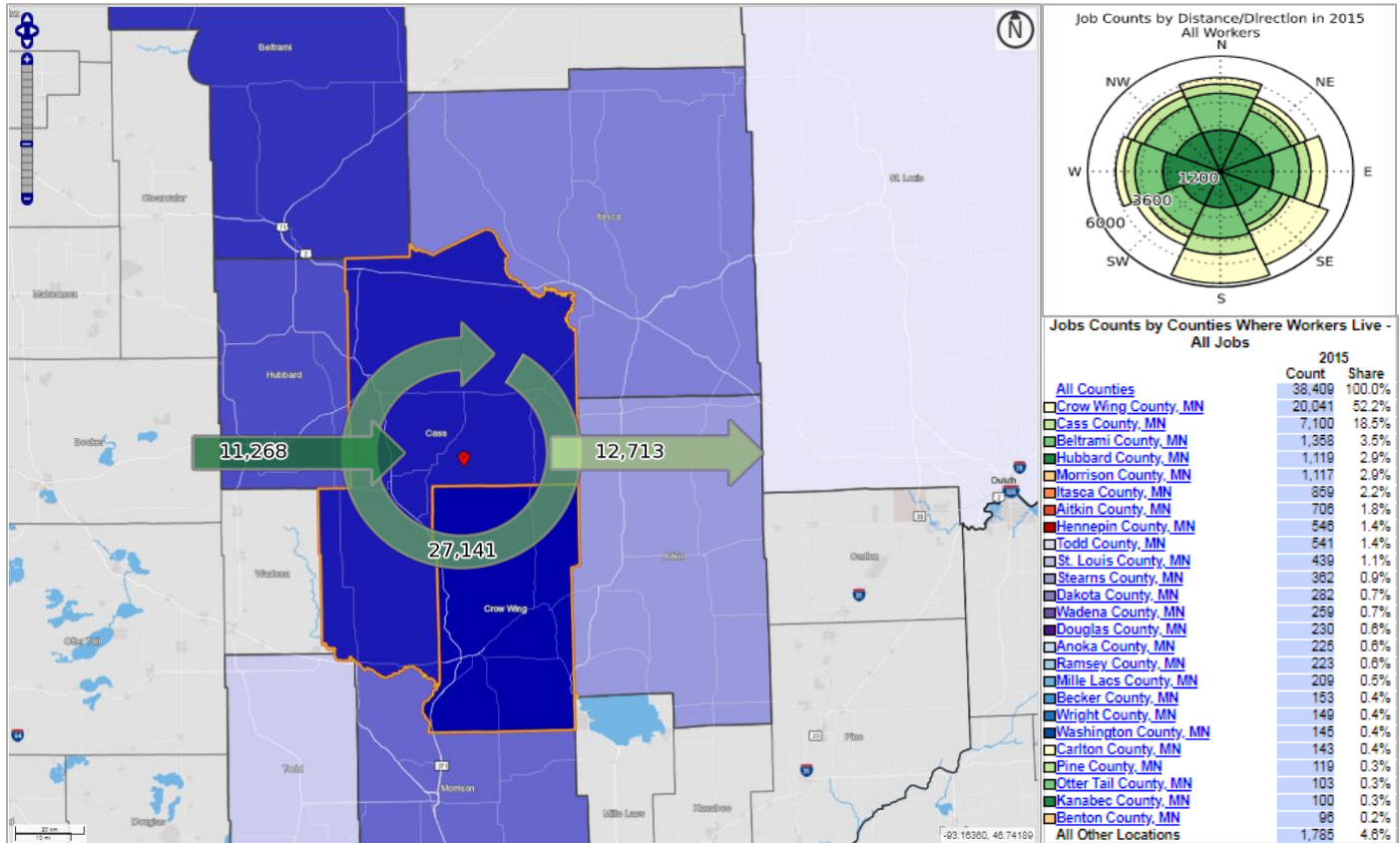
**Table 7. Commuting Patterns, 2015**

Counties outside the region that send the most workers into the region	Counties outside the region that the most workers from inside the region travel to
Beltrami Co. MN	Hennepin Co. MN
Hubbard Co. MN	Stearns Co. MN
Morrison Co. MN	Morrison Co. MN
Itasca Co. MN	Mille Lacs Co. MN
Aitkin Co. MN	St. Louis Co. MN

Source: U.S. Census Bureau, OnTheMap

According to commuting data from the [Census Bureau](#), the Cass and Crow Wing County area is a net labor exporter, having more workers than available jobs. In 2015, 27,141 workers both lived and worked the combined Cass or Crow Wing county area, while another 11,268 persons commuted from surrounding counties there for work. In contrast, 12,713 workers who lived in the combined area commuted elsewhere for work (see Table 6 and Figure 9).

**Figure 9. Crow Wing and Cass County Labor and Commute Shed, 2015**



Source: [U.S. Census Bureau, OnTheMap](#)

**COST OF LIVING**

According to DEED’s [Cost of Living tool](#), the basic needs budget for an average Minnesota family (which consists of 2 adults and 1 child, with 1 full-time and 1 part-time worker) was \$55,200 in 2017. The cost of living for a similar family was \$48,691 in Crow Wing County and \$47,061 in Cass County. These counties have the highest cost of living in EDR 5-North Central, which also includes Morrison, Todd and Wadena Counties. The highest monthly costs were for transportation, food, and housing; but the cost of the region’s housing, child care, and taxes were much lower than the state average (see Table 8). For a single person living alone and working full-time, the estimated yearly cost was less, amounting to \$27,528 in Crow Wing County and \$27,296 in Cass County.

County	Yearly Cost of Living	Hourly Wage Required	Monthly Costs						
			Child Care	Food	Health Care	Housing	Transport	Other	Taxes
<b>Crow Wing Co.</b>									
Ave. Family	\$48,691	\$15.61	\$284	\$745	\$396	\$815	\$825	\$456	\$537
Single 19-50 yrs.	\$27,528	\$13.23	\$0	\$327	\$112	\$595	\$661	\$269	\$330
<b>Cass Co.</b>									
Ave. Family	\$47,061	\$15.08	\$228	\$750	\$396	\$741	\$871	\$436	\$500
Single 19-50 yrs.	\$27,296	\$13.12	\$0	\$329	\$112	\$553	\$695	\$258	\$328

Source: [DEED Cost of Living tool](#)

## REGIONAL WAGES

According to DEED's [Occupational Employment Statistics](#) program, the median hourly wage for all occupations in EDR 5 was \$15.70 in the first quarter of 2017, which was the lowest wage level of the 13 EDRs in the state. The regional median wage was almost \$4.00 less than the statewide median hourly wage (80 percent of the statewide rate) and almost \$6.00 below the median hourly wage in the 7-County Twin Cities metro area, which amounts to over \$12,000 per year for a full-time worker. EDR 5 had lower wages than surrounding regions like EDR 2 at \$16.80, EDR 3 at \$17.25, EDR 4 at \$16.94, EDR 7E at \$17.78, and EDR 7W at \$17.48 (see Table 9). Over 16 percent of the jobs in EDR 5 were office and administrative support, a higher concentration than average in the state. The region also had a higher share of workers in education; protective service; community and social service; building and grounds cleaning and maintenance; production; and construction and extraction occupations (see Table 10).

Region	Median Hourly Wage	Estimated Regional Employment
EDR 1 - Northwest	\$17.59	38,070
EDR 2 - Headwaters	\$16.80	30,860
EDR 3 - Arrowhead	\$17.25	141,910
EDR 4 - West Central	\$16.94	85,410
<b>EDR 5 - North Central</b>	<b>\$15.70</b>	<b>61,170</b>
EDR 6E - Southwest Central	\$17.07	47,410
EDR 6W - Upper MN Valley	\$15.93	16,600
EDR 7E - East Central	\$17.78	48,990
EDR 7W - Central	\$17.48	184,510
EDR 8 - Southwest	\$16.17	50,360
EDR 9 - South Central	\$16.99	114,470
EDR 10 - Southeast	\$18.53	259,060
EDR 11 - 7-County Twin Cities	\$21.55	1,751,580
<b>State of Minnesota</b>	<b>\$19.62</b>	<b>2,810,400</b>

*Source: DEED Occupational Employment Statistics*

## ACCOMMODATION INDUSTRIES

The counties of Cass and Crow Wing stand out in the state for their higher share of employment in *Accommodation*, which is part the *Leisure and Hospitality* industry sector, and closely related to other subsectors such as *Arts, Entertainment and Recreation*, and *Food Services and Drinking Places*. In 2016, the combined area was home to 1.4 percent of total state employment, but had 2.5 percent of jobs in the *Leisure and Hospitality* industry, and over eight percent of the statewide jobs in the *Accommodation* subsector. In the combined area, the location quotient of *Accommodation* was 6.0 in 2016, the highest among three-digit industry sectors (see Table 10).

NAICS Industry Title	NAICS Code	Number of Firms	Number of Jobs	Total Payroll	Median Hourly Wage	Location Quotient
<b>Total, All Industries</b>	<b>0</b>	<b>2,861</b>	<b>39,127</b>	<b>\$1,415,855,652</b>	<b>\$14.78</b>	<b>1.0</b>
Leisure and Hospitality	1026	399	6,852	\$125,398,970	\$11.28	1.8
Arts, Entertainment, and Recreation	71	68	1,015	\$22,101,058	\$11.60	1.5
Accommodation and Food Services	72	330	5,837	\$103,297,912	\$11.27	1.8
<i>Accommodation</i>	721	118	2,799	\$56,954,636	\$11.47	6.0
<i>Food Services and Drinking Places</i>	722	212	3,037	\$46,343,276	\$10.93	1.1

*Source: DEED Quarterly Census of Employment & Wages; Quarterly Employment Demographics*

## ACCOMMODATION: OCCUPATIONS & WAGES

Wages in the *Accommodation* industry vary by occupation, and are comparable to wages in Minnesota statewide and the country as a whole. Despite low regional wages, those in *Accommodation* occupations exceed median wages at the state level at times. Examples include median hourly wages for security guards, restaurant cooks, and janitors. In contrast, other occupations in *Accommodation* have lower median wages than the state overall, such as massage therapists, maids and housekeepers, landscaping and grounds keeping workers, recreation workers, sales representatives, hotel, motel, and resort desk clerks, maintenance and repair workers, and laundry and dry-cleaning workers (see Table 11). Given the tight labor market statewide, wages are likely to play an important role in the long-term sustainability of the *Accommodation* industry in EDR 5- North Central, and specifically Cass and Crow Wing counties, given the high share of industry jobs in the combined area.

**Table 11. 2017 Median Hourly Wage by Occupation, Accommodation Industry**

SOC	Occupation	EDR 5	MN	US
<b>00-0000</b>	<b>Total, all occupations</b>	<b>\$15.70</b>	<b>\$19.62</b>	<b>\$18.12</b>
31-9011	Massage therapists	\$16.70	\$21.43	\$19.69
33-9032	Security guards	\$18.78	\$14.67	\$12.73
35-2010	Cooks, restaurant	\$13.89	\$12.64	\$11.93
35-3011	Bartenders	\$9.77	\$9.74	\$10.27
35-3031	Waiters and Waitresses	\$9.76	\$9.71	\$9.87
35-3041	Food servers, non-restaurant	\$11.51	\$11.73	\$10.49
35-9011	Dining room and bartender helpers	\$9.67	\$9.82	\$9.97
35-9021	Dishwashers	\$9.71	\$10.01	\$10.27
35-9031	Hosts and hostesses, restaurant, lounge, and coffee shop	\$9.67	\$9.97	\$9.86
372011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	\$14.48	\$13.61	\$11.95
372012	Maids and Housekeeping Cleaners	\$10.67	\$11.64	\$10.77
37-3011	Landscaping and grounds keeping workers	\$12.60	\$14.47	\$12.99
39-9032	Recreation workers	\$9.83	\$12.72	\$11.79
412031	Retail Salespersons	\$10.98	\$10.87	\$10.90
41-3099	Sales representatives, services, all other	\$20.45	\$26.70	\$25.23
43-4081	Hotel, motel, and resort desk clerks	\$9.78	\$10.74	\$10.83
49-9071	Maintenance and repair workers, general	\$16.97	\$20.20	\$18.00
51-6011	Laundry and dry-cleaning workers	\$11.40	\$12.86	\$10.56

*Source: DEED Occupational Employment Statistics, 2017*

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