Demographic, Education, and Workforce Trends Impacting the Greater Fargo–Moorhead Metropolitan Area

The Chamber of Fargo, Moorhead, and West Fargo
September 26th, 2013

Ramona Danielson
Assistant Director of ND Compass, www.ndcompass.org
Center for Social Research at NDSU, www.ndsu.edu/csr
ND Compass is a project of the Center for Social Research (CSR) at NDSU (www.ndsu.edu/csr)

Dr. Richard Rathge retired last month
- Former Director of the ND State Data Center at NDSU (and ND Compass and ND KIDS COUNT)
- NDSDC service activities (data requests, presentations, population projections, demographic trends) transitioned to the ND Census Office in the ND Department of Commerce Jan. 1, 2012 (www.commerce.nd.gov/census)
- Research activities transitioned to the CSR at NDSU and we continue to do the great work you have come to expect from us!

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1. To introduce the social indicators website ND Compass and its resources.

2. To present an overview of trends in demographics, trends, and education impacting the metro area.
ND Compass is a project of the Center for Social Research (CSR) at NDSU

- A one-stop social indicators website in North Dakota with tools to help access and interpret data.
Compass gives everyone in our state – policymakers, business and community leaders, concerned individuals who live and work here – a common foundation to identify, understand, and act on quality of life issues that affect our communities.
Working to Change the Equation

From:

Good intentions +
No common base of information =
**Inefficient decisions**

To:

Good intentions +
Sound, credible information +
Common sense of purpose =
**Productive decisions for strong communities**

www.ndcompass.org
A one-stop social indicators website in North Dakota with tools to help access and interpret data.

- More than 1,000 graphs and tables
- 39 key measures in 12 topic areas
- Data by state, region, county, metro/micro areas, reservations
- Data by race, ethnicity, gender, income, and more
- Monthly analysis from researchers and commentary from community leaders and funders
- Twitter feed and Facebook page with breaking data news
- An e-library of recent publications and research-tested strategies
Partnerships

- Wilder Research – created and operates the award-winning MN Compass site
  - Model for ND Compass
  - Run the “back-end”

- Funding Partners

  ![Funding Partners Logos]
Steering Committee, Advisory Committee, Topic-Specific Technical Working Groups

ND Compass engages data users, community stakeholders, and funders to:

- Assess relevancy of topics and key measures
  - Reflect quality-of-life
  - Data availability
- Suggest resources
- Help champion our site
Greater Fargo Moorhead Metropolitan Area

Census Bureau designation
“Fargo Metro Area” = all the communities in Cass and Clay counties

“What it’s about is the quality of life for each and every one of our citizens. We will have communities that are great to live in over a long period of time.”

Governor Dalrymple *(Fargo Monthly, September 2013)*
Data you likely already know:

- Weathered recession very well
- Seeing improved wages
- Low unemployment
- High levels of education
- Increases in population
- Increases in births, school enrollments
- Diverse economy
- Strong housing market
- Affordable cost-of-living (e.g., housing) compared to many other metro areas

September 2013 issue of Fargo Monthly does a great job of highlighting many of the areas’ strengths: http://www.fmspotlight.com/the-magazine/
Dynamics in play – anecdotal evidence, each a research study itself

- Ripple effects of the oil boom in western ND on our community
  - Economic driver, population boon, issues such as homelessness
- Dynamics of city, state policies
  - Tax and wage policies
  - Growth policies
- Water
  - Too much, too little, clean enough
- Forecasts
  - Population, employment, housing
Statewide Trends Impacting Our Community

Including the impacts of the oil boom on western ND and beyond
North Dakota’s 2012 population reached a historic high – 699,628. The previous peak was in 1930 at 680,845.
More North Dakotans live in urban areas (2,500+) by 1990. 223 (62%) of ND’s 357 incorporated places are smaller than 250 people.
Cass County experienced no decades of population loss from 1940–2010 – an exception in the state!
11 of 53 ND counties gained population from 2000 to 2010.
Growth in MN concentrated in the Twin Cities and into lake country.
ND’s population grew 2.2% from 2011 to 2012, the fastest growth among all states; 38 of 53 ND counties gained population from 2011 to 2012.

MN counties of ND metro/micro areas considered “steady”. Much less growth in the state overall.

Population loss still a reality in both states.
Among older adults, ND had 77 men for every 100 women.*

Source: U.S. Census Bureau, Population Division

Center for Social Research at NDSU
*North Dakota's Aging Population
Population by Age

Growth in working age pop corresponds to small growth in # of children.
Growing #, % of elderly: 12% in 1980, projected to reach 18% by 2025.
Continued Population Increase Projected

- Increases in age groups (largely due to oil boom) lessening the “graying of ND”
- # of older adults in ND is expected to increase 50%.*
  - From 98,595 in 2011 to 148,060 in 2025.
  - McKenzie, Williams, Divide counties more than double # of seniors
  - Overall state proportion rise to 18% (from 14% now)
- In 2012, ND had the 2nd highest proportion of older adults ages 85+ in the nation at 2.5%.*
  - # more than doubled from 1980 to 2012
  - Expected to stay fairly stable during next 14 years (grow again when baby boomers reach this age bracket)

*North Dakota’s Aging Population
In 2011, the leading edge of baby boomers turned 65.
Population by Single Year of Age and Sex in the U.S. : 2030

Source: U.S. Census Bureau, Population Projections 2008

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Center for Social Research at NDSU
Dramatic shifts over the past several decades include decrease in # and proportion that are married with children while other types have growth. Non-family households have seen greatest increases (people living alone).
Average household size continues to decrease

Figure 4. Census Average Household Size by Geography

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>1990 Census</th>
<th>2000 Census</th>
<th>2010 Census</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSA</td>
<td>2.51</td>
<td>2.38</td>
<td>2.32</td>
</tr>
<tr>
<td>Cass County</td>
<td>2.45</td>
<td>2.32</td>
<td>2.27</td>
</tr>
<tr>
<td>Clay County</td>
<td>2.64</td>
<td>2.52</td>
<td>2.48</td>
</tr>
<tr>
<td>Fargo</td>
<td>2.46</td>
<td>2.21</td>
<td>2.15</td>
</tr>
<tr>
<td>Moorhead</td>
<td>2.56</td>
<td>2.43</td>
<td>2.41</td>
</tr>
<tr>
<td>West Fargo</td>
<td>2.77</td>
<td>2.61</td>
<td>2.49</td>
</tr>
<tr>
<td>Dilworth</td>
<td>n/a</td>
<td>2.61</td>
<td>2.52</td>
</tr>
</tbody>
</table>

Source:
Diversity is increasing, with much larger numbers/proportions of Of Color residents in the younger age groups.
Local context

Strengths and opportunities
Fargo metro most populated in state = 216,312 people

Population of ND Metro/Micro Areas, 2012

<table>
<thead>
<tr>
<th>Area</th>
<th>Population 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jamestown micro</td>
<td>20,934</td>
</tr>
<tr>
<td>Wahpeton micro</td>
<td>22,802</td>
</tr>
<tr>
<td>Williston micro</td>
<td>26,697</td>
</tr>
<tr>
<td>Dickinson micro</td>
<td>27,676</td>
</tr>
<tr>
<td>Minot micro</td>
<td>73,146</td>
</tr>
<tr>
<td>Grand Forks metro</td>
<td>98,888</td>
</tr>
<tr>
<td>Bismarck metro (4 counties)</td>
<td>120,060</td>
</tr>
<tr>
<td>Fargo metro</td>
<td>216,312</td>
</tr>
</tbody>
</table>
6 of 8 metro/micro areas are growing; Fargo metro at 1.8%

Population Change, 2011-2012

<table>
<thead>
<tr>
<th>Area</th>
<th>2011-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Dakota</td>
<td>2.2%</td>
</tr>
<tr>
<td>Wahpeton micro</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Jamestown micro</td>
<td>-0.1%</td>
</tr>
<tr>
<td>Grand Forks metro</td>
<td>0.8%</td>
</tr>
<tr>
<td>Minot micro</td>
<td>1.2%</td>
</tr>
<tr>
<td>Fargo metro</td>
<td>1.8%</td>
</tr>
<tr>
<td>Bismarck metro (4 counties)</td>
<td>2.4%</td>
</tr>
<tr>
<td>Dickinson micro</td>
<td>6.5%</td>
</tr>
<tr>
<td>Williston micro</td>
<td>9.3%</td>
</tr>
</tbody>
</table>
### TABLE 2. POPULATION BY AGE, 2010 and 2025

<table>
<thead>
<tr>
<th>Area</th>
<th>Less Than 25 Years</th>
<th>Ages 25 to 44</th>
<th>Ages 45 to 64</th>
<th>65 Years and Older</th>
<th>Change: 2010 to 2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region V</td>
<td>58,438</td>
<td>77,939</td>
<td>13.9%</td>
<td>51,328</td>
<td>59,249</td>
</tr>
<tr>
<td>Cass</td>
<td>56,882</td>
<td>57,102</td>
<td>18.0%</td>
<td>43,914</td>
<td>52,289</td>
</tr>
<tr>
<td>Roanoke</td>
<td>1,506</td>
<td>1,270</td>
<td>-18.4%</td>
<td>1,155</td>
<td>936</td>
</tr>
<tr>
<td>Richland</td>
<td>5,012</td>
<td>5,775</td>
<td>-6.0%</td>
<td>3,078</td>
<td>3,101</td>
</tr>
<tr>
<td>Sargent</td>
<td>1,065</td>
<td>910</td>
<td>-14.0%</td>
<td>604</td>
<td>616</td>
</tr>
<tr>
<td>Steele</td>
<td>512</td>
<td>445</td>
<td>-13.1%</td>
<td>389</td>
<td>343</td>
</tr>
<tr>
<td>Traill</td>
<td>2,011</td>
<td>2,431</td>
<td>-6.0%</td>
<td>1,696</td>
<td>1,752</td>
</tr>
<tr>
<td>Fargo</td>
<td>41,321</td>
<td>48,410</td>
<td>17.2%</td>
<td>30,608</td>
<td>36,287</td>
</tr>
<tr>
<td>Watford City</td>
<td>3,267</td>
<td>3,968</td>
<td>22.2%</td>
<td>2,505</td>
<td>1,406</td>
</tr>
<tr>
<td>West Fargo</td>
<td>9,346</td>
<td>11,182</td>
<td>19.7%</td>
<td>8,668</td>
<td>10,193</td>
</tr>
</tbody>
</table>

Source: http://www.ndhfa.org/Web_Images/NDSHNA_HousingForecast_Final.pdf
Fargo metro a standout regarding % of population with at least a 4-year degree (34.8%)

Notes:
The estimates shown here are based on data collected between 2007 and 2011, and therefore they describe the average characteristics for that 5-year time period.
27% of H.S. grads in Cass County met ACT college benchmark scores in all 4 subject areas in 2012

<table>
<thead>
<tr>
<th>Location</th>
<th>Category</th>
<th>Data Type</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cass</td>
<td>College English</td>
<td>Percent</td>
<td>79.4%</td>
<td>76.5%</td>
<td>75.5%</td>
<td>67.1%</td>
<td>66.6%</td>
</tr>
<tr>
<td></td>
<td>College Math</td>
<td>Percent</td>
<td>55.8%</td>
<td>54.7%</td>
<td>54.8%</td>
<td>47.8%</td>
<td>49.6%</td>
</tr>
<tr>
<td></td>
<td>College Reading</td>
<td>Percent</td>
<td>64.1%</td>
<td>63.5%</td>
<td>63.5%</td>
<td>50.6%</td>
<td>53.2%</td>
</tr>
<tr>
<td></td>
<td>College Science</td>
<td>Percent</td>
<td>40.1%</td>
<td>38.4%</td>
<td>37.5%</td>
<td>31.8%</td>
<td>34.3%</td>
</tr>
<tr>
<td></td>
<td>All Four Subject Areas</td>
<td>Percent</td>
<td>31.9%</td>
<td>31.6%</td>
<td>29.5%</td>
<td>25.3%</td>
<td>27.2%</td>
</tr>
</tbody>
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<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Dakota</td>
<td>College English</td>
<td>Percent</td>
<td>71.0%</td>
<td>70.0%</td>
<td>71.0%</td>
<td>63.0%</td>
<td>64.0%</td>
</tr>
<tr>
<td></td>
<td>College Math</td>
<td>Percent</td>
<td>48.3%</td>
<td>47.0%</td>
<td>48.0%</td>
<td>43.0%</td>
<td>45.0%</td>
</tr>
<tr>
<td></td>
<td>College Reading</td>
<td>Percent</td>
<td>56.3%</td>
<td>57.0%</td>
<td>56.0%</td>
<td>48.0%</td>
<td>49.0%</td>
</tr>
<tr>
<td></td>
<td>College Science</td>
<td>Percent</td>
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<td>31.0%</td>
<td>26.0%</td>
<td>30.0%</td>
</tr>
<tr>
<td></td>
<td>All Four Subject Areas</td>
<td>Percent</td>
<td>23.7%</td>
<td>24.0%</td>
<td>24.0%</td>
<td>21.0%</td>
<td>23.0%</td>
</tr>
</tbody>
</table>
High proportions of workers across the state (including women with young children)

Notes:
The estimates shown here are based on data collected between 2007 and 2011, and therefore they describe the average characteristics for that 5-year time period.
Average annual cost of sending an infant to a center-based licensed child care facility in Cass County in 2012 = $8,923

<table>
<thead>
<tr>
<th>Age of Child</th>
<th>Family and Group</th>
<th>Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ages 0 to 17 months</td>
<td>$6,877 $12,636</td>
<td>$8,923 $14,040</td>
</tr>
<tr>
<td>18 to 35 months</td>
<td>$6,573 $11,700</td>
<td>$8,312 $11,700</td>
</tr>
<tr>
<td>Ages 3 to 5</td>
<td>$6,387 $11,700</td>
<td>$7,532 $11,700</td>
</tr>
</tbody>
</table>

Source: http://www.ndchildcare.org/data-pub/county.html
Fargo metro at about state average for 3- and 4-year olds enrolled in preschool (34%); ND is below the national average.

Notes:
The estimates shown here are based on data collected between 2009 and 2011, and therefore they describe the average characteristics for that 3-year time period.
Steady growth in the proportion of metro area school children receiving free or reduced price lunch (Cass=27.1%, Clay=34.3% in 2012)
Fargo metro has smallest proportion of seniors (10.4%) but largest number (21,628)
Homelessness has increased in the Metro area since 2000, doubling in Fargo

Source: https://www.cityoffargo.com/Info/Departments/PlanningandDevelopment/Homelessness/StatisticsandResearch/
Homeless adults and their children in Fargo, North Dakota and Moorhead Minnesota – study by Wilder Research, August 2013
~1 in 4 households in the Fargo metro area are costburdened (26% in 2012)
Resources for further information

- **Compass**
  - www.ndcompass.org
  - www.mncompass.org

- **KIDS COUNT**
  - datacenter.kidscount.org
  - www.ndkidscount.org

- **Census Bureau (Pop Estimates, ACS)**
  - factfinder2.census.gov
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