

# DELAWARE

## Annual Economic Report

### 2013



Office of Occupational & Labor Market Information  
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# DELAWARE Annual Economic Report 2013

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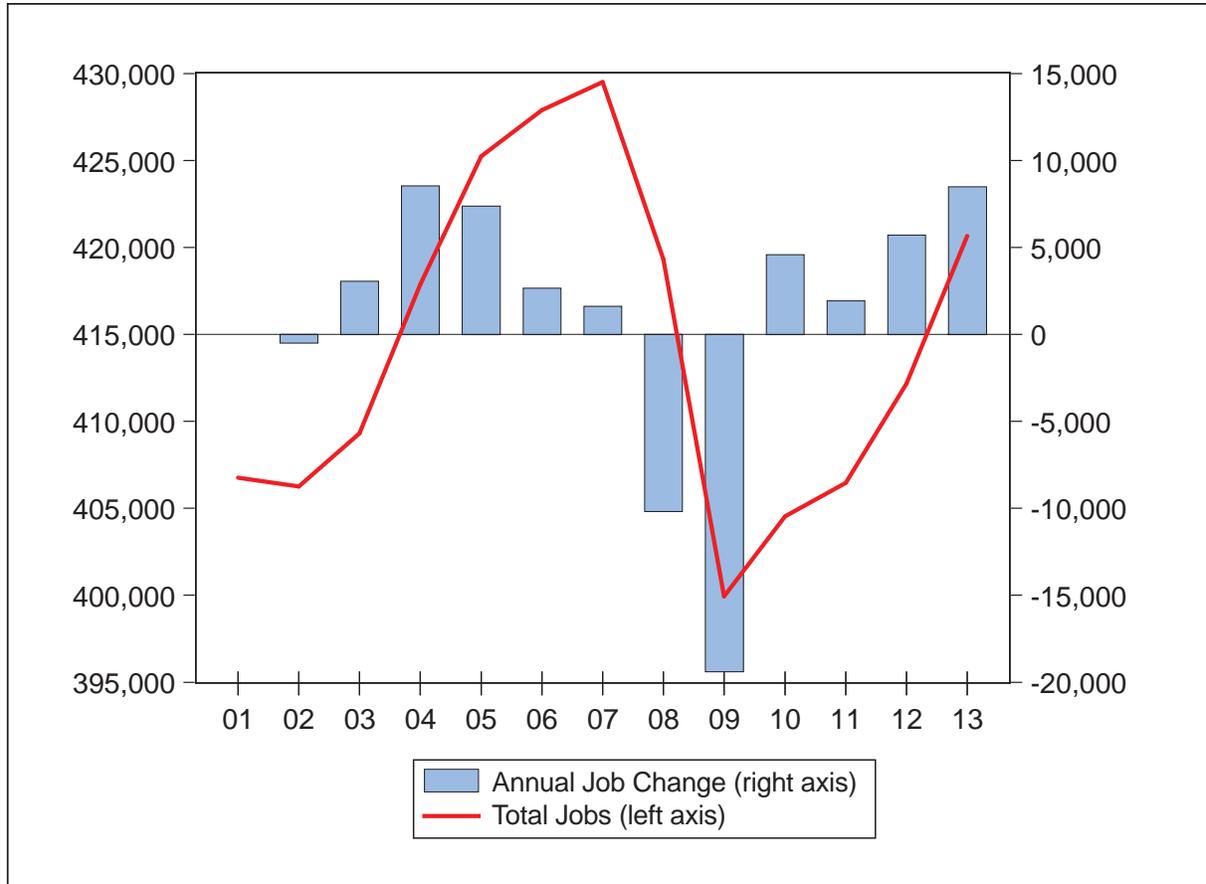


# Overview of Employment by Industry - 2013

Job growth accelerated in Delaware in 2013, with the state gaining 8,480 jobs after adding 5,710 the previous year. In the four years since job growth resumed in 2010, Delaware has added 20,710 jobs.

Total growth in the five-year expansion prior to the recession (2003 through 2007) was 23,240 jobs. Given that at the time this report is being written (September 2014) jobs are being added at a

faster pace than in 2013, it is nearly certain that Delaware job growth in the five years since the recession will be substantially more than during the entire five year expansion prior to the recession.



Job growth in 2013 was led by New Castle County, which added 4,610 jobs (1.7 percent). Job growth in the state's other two counties was skewed by the discovery that a large facility on their border which had been counted in Sussex County's job totals actually was in Kent County. After correcting this, it appears that Kent County gained 2,740 jobs,

while it actually gained 1,570 jobs. Sussex County appears to have gained only 350 jobs, but it really added 1,520 jobs (there was also an increase of 780 jobs considered multi-county). Even after accounting for this administrative change, Kent County's 2.5 percent job growth topped Sussex County's 2.3 percent growth.

The data we have that show full-time versus part-time employment come from the Current Population Survey (CPS) of Delaware households. The CPS measures labor activity of state residents, so it is not strictly comparable to the jobs data presented here, which come from payroll records of employers in the state, who may employ residents

of other states. What the CPS data show is an increase in state residents employed full-time in 2013, and a decrease in those employed part-time. Since employer payroll records in Delaware do not provide information on hours worked, the only actual data available, the CPS, would argue against the notion that most of the jobs being created are part-time.

Job gains were broad-based across occupations. Of the 22 civilian major occupational groups in the Standard Occupational Classification (SOC) system, only 3 lost jobs in 2013: Architecture and Engineering (-1,270); Computer and Mathematical (-840); and Production (-420). The greatest job gains were in Education, Training and Library (+1,600); Transportation and Material Moving (+1,570); and Construction (+1,020).

While much of the economic data this office produces in cooperation with the US Bureau of Labor Statistics (BLS) come from surveys, the data in this overview of industry employment come from actual payroll records that nearly all of the state's employers are required to submit as part of the Unemployment Insurance (UI) system. The payroll data cover over 90 percent of

Delaware's employment. Excluded are the self-employed, most farmworkers, most railroad workers, interns, and anyone else specifically excluded from the UI system.

Annual employment figures can be calculated in at least two ways: as an average of all 12 months, or at a particular moment in time. In this overview, we use the December, 2013 number as the industry employment level, and its difference from the corresponding December, 2012 level as the measure of 2013 job change. The reason for this is to better isolate actual 2013 changes in this annual report. If we used annual average data, the change between 2012 and 2013 would really measure two years of data, starting in January 2012, rather than focusing solely on 2013.

Another choice is in the treatment of industry versus ownership. Consider public school teachers; they can be counted in the Educational Services industry sector, or counted as part of Local Government, but they should not be counted in both. In this overview, we take an industry-first approach, so government workers who fit in a clearly defined industry are counted as part of that industry. The rest are counted as part of Public

Administration. The December, 2013 employment levels by industry for each level of government are listed in the table on the next page.

Finally, this overview counts jobs, not people. The counts come from the employers' operations in Delaware. Most of the jobs are filled by state residents, but many are filled by individuals who live in another state. About seven percent of the people working in Delaware work at more than one job. Because this overview is based on employer payroll records, these individuals would be counted separately at each of their jobs. The industries in the body of this overview are ordered by the number of net new jobs created in 2013. Of the 20 industry sectors that make up the North American Industry Classification System (NAICS), we report on 18 of them. Agriculture, Forestry, Fishing, and Hunting is omitted because most of the employment in agriculture is outside the scope of the payroll data which form the basis of this report. Mining, Quarrying, and Oil and Gas Extraction is omitted due to its extremely low employment levels in the state. Of the 18 industry sectors we do report on, 11 gained jobs in 2013, 6 lost jobs, and 1 remained at the same level as in 2012.

## Industry Employment of Government Workers, December 2013

| Industry Description                         | Industry Code (NAICS) | Federal      | State         | Local         | Total Government |
|--|-----------------------|--------------|---------------|---------------|------------------|
| Agriculture, Forestry, Fishing and Hunting   | 11                    | 0            | 0             | 0             | 0                |
| Mining                                       | 21                    | 0            | 0             | 0             | 0                |
| Utilities                                    | 22                    | 0            | 0             | 11            | 11               |
| Construction                                 | 23                    | 0            | 1,550         | 0             | 1,550            |
| Manufacturing                                | 31-33                 | 0            | 0             | 0             | 0                |
| Wholesale Trade                              | 42                    | 0            | 0             | 0             | 0                |
| Retail Trade                                 | 44-45                 | 9            | 0             | 0             | 9                |
| Transportation and Warehousing               | 48-49                 | 1,983        | 1,278         | 216           | 3,477            |
| Information                                  | 51                    | 4            | 239           | 0             | 243              |
| Finance and Insurance                        | 52                    | 55           | 0             | 0             | 55               |
| Real Estate and Rental and Leasing           | 53                    | 0            | 15            | 91            | 106              |
| Professional and Technical Services          | 54                    | 19           | 146           | 0             | 165              |
| Management of Companies And Enterprises      | 55                    | 0            | 0             | 0             | 0                |
| Administrative and Waste Services            | 56                    | 3            | 134           | 0             | 137              |
| Educational Services                         | 61                    | 1            | 10,774        | 19,546        | 30,321           |
| Health Care and Social Assistance            | 62                    | 1,078        | 4,263         | 0             | 5,341            |
| Arts, Entertainment, and Recreation          | 71                    | 45           | 0             | 0             | 45               |
| Accommodation and Food Services              | 72                    | 41           | 0             | 0             | 41               |
| Other Services, Except Public Administration | 81                    | 0            | 0             | 0             | 0                |
| Public Administration                        | 92                    | 2,301        | 11,212        | 6,373         | 19,886           |
| <b>Total Industries</b>                      | <b>Total</b>          | <b>5,539</b> | <b>29,611</b> | <b>26,237</b> | <b>61,387</b>    |

## 1. Administrative and Support and Waste Management and Remediation Services

This industry sector, whose cumbersome official name we usually shorten to Administrative and Waste Services, led all industry sectors in job growth during 2013. The 2,340 net new jobs from December 2012 through December 2013 outpaced the second-place sector, Health Care and Social Assistance, by nearly 500 jobs. The job gains were centered in New Castle County, which added 1,850 jobs. The average wage there was \$33,980, a drop of 2.4 percent from 2012. Sussex County added 240 jobs. Average pay there was \$26,580, down by 1.5 percent from 2012. Kent County lost 110 jobs in this sector; the average pay there was \$29,004, which represented a 3.1 percent decline from the previous year. There was a gain of 350 jobs that were considered multi-county.

There are two subsectors, with Administrative and Support Services dominant, having 95 percent of the employment in the sector. It includes business services such as call centers, collection agencies, janitorial services, pest control, landscaping, and temporary help. This last industry accounted for all of the job gains in the sector. There were 10,200 people working through Temporary help agencies in December 2013, an increase of 2,610 from the previous December. The subsector Waste Management and Remediation Services is much smaller, although it did gain 40 jobs to end 2013 with a total of 1,350. Average pay there was \$51,376 in 2013.

Even after the job growth in 2013, Administrative and Waste Services accounts for 6.2 percent of the total jobs in the state, less than its 7.3 percent share nationally. The ratio of these two percentages yields a location quotient for this industry of 0.85.

## 2. Health Care and Social Assistance

Health Care and Social Assistance, the 2012 leading industry for job growth in Delaware, slipped to second in 2013, gaining 1,850 jobs. However, about one-third of that gain was due to an administrative reclassification of 640 jobs out of another industry. Across the nation home health care providers, who had been in the industry subsector



Private Household employment, were reclassified into the Social Assistance subsector within Health Care. Without this change, this sector would be number five on this list. New Castle County led the growth, adding 1,440 jobs. The average wage for the sector there was \$52,628, \$12 less than the year before. Kent County gained 420

jobs. The average pay there in the sector was \$39,708, a 0.5 percent decrease from 2012. Sussex County lost 50 jobs in 2013, though it was the only county with wage gains. The \$47,116 average wage there was 1.5 percent above the 2012 average pay.

There are four subsectors in Health Care and Social Assistance, with Hospitals being the largest and best-paying. There were 23,210 employees at various hospitals throughout the state at the end of 2013, with an average pay of \$64,516. Employment was up by 260 from 2012, while average pay increased by 2.7 percent. Ambulatory Health Services, which includes clinics and practitioners offices, employed 19,410 people, an increase of 460 from the year before. The average wage at these facilities was \$58,504, which was 1.7 percent below the average pay in 2012. The Social Assistance subsector had 13,540 workers at the end of 2013, an increase of 1,180 from 2012, but as noted above, over half of these were reclassified into this subsector. Average pay is the lowest of the four subsectors, at \$25,936, which was down by 1.6 percent from 2012. Nursing and Residential Care is the smallest subsector, with 11,310 employees, and the only one to shrink in 2013, losing 50 jobs. Average pay was \$33,300, up by 3.1 percent from 2012.

Health Care and Social Assistance remains Delaware's biggest industry in terms of jobs, with 67,471 at the end of 2013. This number includes over 5,000 workers employed by state and federal government, but even if they were removed, the number of jobs in this industry

now exceeds those in all levels of government. This sector makes up 16 percent of all Delaware jobs, greater than the 14.4 percent national average, for a location quotient of 1.11.

### **3. Transportation and Warehousing**

Transportation and Warehousing gained 1,660 jobs in 2013, putting it third among the state's industry sectors. All three counties added jobs, but New Castle gained by far the most, adding 1,500. Jobs there topped 10,000 during 2013, ending the year with 10,990. Average pay in New Castle County was \$46,904, 2.7 percent below the 2012 average. Kent County gained 160 jobs in this sector, bringing the total number there at the end of 2013 to 2,580. Average pay was \$39,040, which was 0.3 percent above the 2012 level. Sussex County increased jobs in this sector by 90, to a total of 1,730. Average pay there trails the other counties at \$37,296; it fell by 1.8% in 2013.

There are eight subsectors with appreciable employment in Delaware. Air Transportation is the highest-paying of those, with an average wage of \$111,716 in 2013, up by 3.9 percent from the previous year. There were only 120 people employed in this subsector at the end of 2013. The largest subsector is Warehousing and Storage, with 4,050 jobs in December, 2013. It also accounted for most of the job growth, gaining 1,450 over the year. Average pay was \$43,468, down by 8.1 percent from 2012. The Transit subsector had just over 3,000 jobs; a gain of 50 jobs during 2013 put the total there to 3,030. Average

pay was \$28,600, which was 2.3 percent more than in 2012. Truck Transportation ended 2013 with 2,330 jobs, 60 more than it began the year. Average pay was \$47,468, up by 4.1 percent from 2012. Support Activities, such as towing, cargo handling, and logistics was the only other subsector with more than 2,000 workers. The 2,240 workers there were 130 fewer than the previous year, but their average pay rose by 6.5 percent to \$55,552. Employment in Transportation and Warehousing is slightly below the national average. The 15,375 jobs in Delaware represent 3.7 percent of the state's total employment. The US figure is slightly below four percent, yielding a location quotient of 0.93.

### **4. Retail Trade**

Retail Trade bounced back from a lackluster 2012 to add 1,650 jobs in 2013, fourth best among the state's sectors. New Castle County led the way with 930 jobs gained, ending the year with a total of 32,250. The average wage was \$27,076, which was 0.4 percent higher than in 2012. Sussex County gained 640 jobs in retail, paying an average wage of \$24,648. This was a pay increase of 1.7 percent. Retail Trade is Sussex County's biggest employer. Kent County saw jobs in this sector rise modestly. The 70 jobs added there brought the total in the county to 9,760.

Retail Trade has 12 subsectors. General Merchandise Stores is the largest, employing 11,060 at the end of 2013. This was 150 fewer than the same time in 2012. The Food and Beverage Stores subsector gained the most jobs, adding 710. Motor

Vehicle and Parts Dealers also grew during 2013, adding 330 jobs. There were 6,830 people employed in this subsector throughout the state. Other retailing subsectors showing growth in 2013 were Building Material and Garden Supply Stores, which increased by 240 jobs, Electronics and Appliance Stores, which gained 120, and Health and Personal Care Stores, which along with Nonstore Retailers, each added 100 jobs. Average pay is fairly low throughout the Retail Trade sector. Motor Vehicle and Parts Dealers has the highest average wage, at \$44,388.

Retail Trade ended 2013 with a total of 54,720 jobs in Delaware, making it the state's second-largest industry sector. Its 13 percent share of all jobs in the state is above the national 11.1 percent. The location quotient for Retail Trade is 1.17.

### **5. Professional and Technical Services**

This sector added 1,210 jobs in 2013, which was the same number it added in 2012. Then, that was good enough for third-best, but now it places fifth. A plurality of the jobs gained, 520, were considered multi-county. New Castle County added 490 jobs. The average pay there is by far the highest at \$101,720, though this was down by 2.5 percent from 2012. Sussex County added 130 jobs in this sector. Pay there averaged \$52,992, which was 2.3 percent above the average in 2012. In Kent County, where the average pay was \$56,456, there were 80 jobs gained. Average pay there declined by 1.1 percent.

Professional, Scientific, and Technical Services has no sub-

sectors, but there are nine industry groups, the next level of detail in the North American Industry Classification System (NAICS). The largest of these at the end of 2013 was Scientific Research, with 6,800 jobs. It added 460 jobs in 2013, more

than any other group in this industry, after gaining 500 jobs in 2012. The next largest group, Legal Services, had 5,450 jobs in the state at the end of 2012, after adding 160 during the year. With 4,690 jobs, Computer Systems Design was third-largest; it

gained 290 jobs during the year, after adding 280 last year.

Professional and Technical Services accounts for 6.9 percent of Delaware's total employment, more than the national average of 6.1 percent. Its location quotient is 1.13.

### Professional, Scientific, and Technical Services Industry Groups

| Industry Group                                     | December 2013 Employment | Job Change from Dec. 2012 |
|--|--------------------------|---------------------------|
| Scientific Research                                | 6,800                    | +460                      |
| Legal Services                                     | 5,450                    | +160                      |
| Computer Systems Design                            | 4,690                    | +290                      |
| Architecture and Engineering                       | 4,000                    | +200                      |
| Management Consulting                              | 3,240                    | +80                       |
| Accounting Services                                | 2,510                    | +60                       |
| Other Professional, Scientific, Technical Services | 1,320                    | -10                       |
| Advertising  | 930                      | 0                         |
| Specialized Design Services                        | 180                      | 0                         |

### 6. Finance and Insurance

The financial sector gained 1,010 jobs in 2013, after adding one hundred more than that in 2012. It ended 2013 with a statewide total of 39,280 workers. The job gains were all in New Castle County, which already had the bulk of Delaware's employment in this sector. The state's northernmost county added 1,310 jobs to get to a total of 35,130 in December. The average wage was \$92,204 in 2013, up 3.3 percent from 2012. Kent County lost 20 jobs; average pay there was \$71,692, a 1.3 percent increase from 2012. Sussex County lost 340 jobs in 2013. Pay there is lowest in the state, at \$53,928, although this was up by 8.4 percent from 2012.

There are four subsectors in this industry, with Credit Intermediation (banking) being largest. It employed 26,550 in December of 2013, 1,080 more than the year before. Average pay in banking was \$77,740 in 2013, down by 6.2 percent from 2012. Insurance Carriers ended 2013 with 6,810 employees, 100 fewer than in 2012. Average pay was \$78,596, up by 1.3 percent. There was an administrative change which moved about 350 jobs from the Funds and Trusts subsector into the Securities and Financial Investments subsector. Securities ended 2013 with 5,910 jobs, paying an average of \$120,828 that year. This was up by 9.8 percent, which may be partly due to the administrative change. The 20 jobs left in Funds and Trusts paid an

average of \$159,652, down by 3.2 percent from 2012.

Finance and Insurance generated over 29 percent of Delaware's state GDP in 2013. It employs 9.3 percent of the state's workforce, more than double the national average of 4.1 percent. Its location quotient of 2.26 is the highest of any industry sector in the state.

### 7. Accommodation and Food Services

The number of jobs in this sector rose by 840 from December 2012 to December 2013, ending the year with a total of 34,580 jobs. This is a highly seasonal industry. Jobs peaked in July just short of 40,000, almost 1,700 above the July peak

in 2012. Almost all of the seasonal changes occur in Sussex County, where employment rose to 13,300 in July, before falling back to 8,300 in December. This was 410 more jobs than in December 2012. Average pay in Sussex County was the highest in the state, at \$17,288, a 1.1 percent increase over 2012. Jobs in New Castle County rose by 190 to a total of 20,780. Average pay was \$17,208 there, up by 0.2 percent from 2012. Kent County added 260 jobs in 2013, with an average pay of \$14,084. This represented a 1.4 percent drop in pay from the 2012 level.

There are two subsectors in Accommodation and Food Services, namely, Accommodation and Food Services. Accommodation is by far the smaller, with 2,660 workers at the end of 2013. This was down by 190 from the end of 2012. Food Services employment rose by 1,040 to a total of 31,920.

Accommodation and Food Services employment makes up 8.2 percent of Delaware's jobs, slightly below the national average of 8.9 percent. Its location quotient is 0.92.

## 8. Construction

Jobs in Construction rose by 360 to a total of 21,020 at the end of 2013. Over half of the construction jobs in the state are in New Castle County, but this was the only county where jobs declined in this sector. There were 190 fewer jobs at the end of 2013, for a total of 12,810. Average pay in NCC was \$56,432, 3.0 percent higher than in 2012. Kent County added 310 jobs. Average pay there was \$44,168, which was 6.5 percent more than in 2012. Sussex County also gained jobs in this sector, 260 of

them. Average pay was \$40,540, 5.8 percent above the previous year.

There are three subsectors in Construction, and all three gained jobs in 2013. The largest is Specialty Trade Contractors; its December 2013 total of 12,470 jobs was 140 more than the year before. The Construction of Buildings subsector gained 60 jobs to get to a total of 4,680. Heavy and Civil Engineering gained 160 jobs, to end 2013 with 3,870.



Five percent of Delaware's total workforce is employed in Construction. This is above the national average of 4.3 percent, for a location quotient of 1.17.

## 9. Real Estate and Rental and Leasing

This industry sector gained 260 jobs in 2013, ending the year with a total of 5,530. Average pay was \$42,836, 1.4 percent higher than in 2012. Most of the job gains were in New Castle County, where 140 were added to get to a total of 3,510. Average pay there was \$48,188, 1.5 percent higher than in 2012. Sussex

County gained 60 jobs, for a total of 1,480. Average pay is substantially lower there, at \$33,424, which was 0.1 percent lower than in 2012. Kent County gained 40 jobs in this sector. Pay there was \$35,008, a 3.5 percent increase from 2012.

There are two subsectors, with Real Estate being the largest. Its 4,260 job total in December 2013 was up by 210 from the previous December. The Rental and Leasing subsector gained 50 jobs to end 2013 with a total of 1,260.

This small industry in terms of employment had only 1.3 percent of Delaware's jobs, though it is worth noting that self-employment is not uncommon in this sector, and the self-employed will not be included in these numbers. Nationally, 1.5 percent of all jobs are in Real Estate and Rental and Leasing, making the location quotient for Delaware 0.90.

## 10. Educational Services

Employment in the Education sector rose by 250 in 2013, with all of the gains coming at establishments classified under state government ownership. This includes charter schools, public universities, and the state community college system. There were 400 jobs added at these establishments during 2013, for a year-end total of 10,770. Local education, which is the public school system, saw employment fall by 60 to end the year with 19,550 jobs. Privately-owned institutions, the only sector to gain jobs in 2012, lost 100 jobs, half of what was gained the previous year.

All three counties had employment gains. New Castle County education

employment rose by 90. The average wage there was \$59,456, 2.3 percent higher than in 2012. There were 80 jobs added in Kent County, where the average wage was \$42,412. This was an increase of 2.3 percent over 2012. Sussex County, where average pay was \$43,656, gained 70 jobs in education. Average pay there rose by 2.0 percent.

Educational Services is Delaware's fourth largest industry, with 34,890 jobs in December 2013. This amounts to 8.3 percent of all the jobs in the state, a lower percentage than the national average of 9.3 percent. This yields a location quotient of 0.89 in education.

### 11. Public Administration

This sector consists of governmental agencies that manage public programs using executive, legislative, or judicial powers. It is not equivalent to government, as government-employed workers who work in a clearly defined industry, such as education or construction, would be grouped with those industry sectors, and not here. (See page 5 for a table with all government workers by industry sector). Total employment in Public Administration went up by 60 jobs in 2013. Federal government jobs in this sector fell by 190, to a year-end total of 2,300. Average pay there was highest among the levels of government, at \$68,628. State government jobs in Public Administration increased by 150 from December 2012, to a total of 11,210. Average pay was \$49,696. Local government jobs in this sector increased by 100, to 6,370. Average pay in these jobs was \$47,852.

The majority of jobs in Public Administration are in Kent County, where there were 9,790 in December 2013. New Castle had 8,580 jobs in this sector at that time, while Sussex County had 1,490.

Public Administration jobs represent 4.7 of Delaware's total employment, which is 90 percent of the national average of 5.3 percent. The location quotient is 0.90.

### 12. Utilities

Employment in Utilities was flat during 2013; it began and ended the year with 2,090 jobs. Average pay rose by 3.2 percent to \$98,436, second-highest of all the state's industry sectors. There were slight declines in employment in Kent County, offset by slight increases in Sussex County. New Castle County, where the bulk of the sector's employment is located, held steady,



while average wages there topped \$100,000.

There are no subsectors in Utilities, but there are three industry groups. Electric Power Generation, Transmission, and Distribution is the largest; it ended 2013 with 1,590

workers, 10 fewer than the previous year. Natural Gas Distribution gained 14 jobs, but remains small with just under 100 workers total in the state. The third industry group, Water and Sewage, lost 5 jobs to end the year with 400.

Utilities is the smallest of all the state's sectors, accounting for just 0.5 percent of total employment. The national average is slightly higher, at 0.6 percent, for a location quotient of 0.84.

### 13. Wholesale Trade

Employment in the Wholesale Trade sector fell by 70 jobs in 2013; it ended the year with 12,340 jobs in the state. New Castle County employment fell by 60 jobs. About two-thirds of the state's employment is located there. Wages in NCC are the highest in the state in this sector; they averaged \$87,364, even after falling by 4.1 percent from 2012 levels. Sussex County added 50 jobs. The average wage there was \$52,384, just 0.1 percent above the 2012 level. Kent County employment was flat. Even after a 3.5 percent increase, average pay there was the lowest in the state at \$46,236.

The smallest of the sector's three subsectors, Electronic Markets, saw employment drop by 120 to a total of 2,020 jobs at the end of the year. The highest-paying subsector, Nondurable Goods Wholesalers (2013 average pay \$98,548), gained 30 jobs to get to a total of 5,170. Durable Goods Wholesalers added 20 jobs, ending the year with a total of 5,150.

Wholesale Trade's location quotient of 0.70 indicates a locally less

concentrated industry. This sector makes up 3 percent of Delaware's employment; across the nation it averages 4.3 percent.

#### **14. Arts, Entertainment, and Recreation**

The number of jobs in Arts, Entertainment, and Recreation fell by 140 in 2013, for a year-end total of 7,520. New Castle County lost the bulk of the jobs, falling by 140, while a small gain in Kent County (up by nearly twenty jobs) was offset by a small loss in Sussex County. Average wages, already low, fell in all three counties. Sussex County wages declined the most, falling by 5.2 percent to \$20,528. Wages in Kent County fell by 4.0 percent to \$26,568, while the average wage in New Castle of \$27,804 was 3.0 percent below the 2012 level.

The three subsectors in this sector had mixed results in 2013. The largest, Amusements, Gambling, and Recreation, lost 260 jobs. It ended the year with a total of 6,170 jobs. Museums, Historical Sites, Zoos, and Parks gained 160 jobs to end the year with a total of 830. The smallest subsector, Performing Arts and Spectator Sports, dropped by 30 to finish the year with 530 jobs.

Even after losing jobs in each of the last three years, Arts, Entertainment, and Recreation remains more concentrated in Delaware than in the US, with a location quotient of 1.07. It employs 1.8 percent of the state's workforce, compared with 1.7 percent nationally.

#### **15. Information**

The Information sector lost 160 jobs in 2013, ending the year with

a total of 5,400. This represented an improvement over 2012, when it lost 330 jobs. All of the jobs lost were in New Castle County; both Kent and Sussex counties managed small gains. Kent County added 30 jobs, but saw average wages decline by 0.4 percent to \$55,604. Sussex County, where the average wage grew by 15.2 percent, added 10 jobs. New Castle County lost 190 jobs, though wages there increased by 3.2 percent, to \$62,204.

There are six subsectors in Information. The largest, Telecommunications, also lost the most jobs. It dropped by 110 to end 2013 with 2,240 jobs in the state. Data Processing had year-end employment of 1,320, which was down by 50 from 2012. It was the highest-paying subsector, with average wages of \$79,664. Publishing lost 10 jobs to end the year with 900. The other three subsectors all have just over 300 workers each.

The Information sector makes up only 1.3 percent of the jobs in Delaware, well below the US average of 2.1 percent. Its location quotient is 0.61.

#### **16. Manufacturing**

Manufacturing employment fell by 260 in 2013, just about the same amount it went up in 2012. Jobs in Sussex County decreased by 1,050, and jobs in Kent County increased by 1,390, but these changes were largely the result of an administrative reclassification of a facility near the border of the two counties that was originally recorded as being in Sussex County being corrected to reflect its actual location

as Kent County. The average wage in Kent County was \$47,100, a decline of 12.4 percent from 2012. Sussex County wages averaged \$38,836, an increase of 5.4 percent. Manufacturing employment in New Castle County fell by 600. Wages there averaged \$77,792, an increase of 2.2 percent from 2012.

There are 20 manufacturing subsectors. The biggest actual job gains were in Food Manufacturing, which gained 190, and Plastics and Rubber Products, which gained 110. An apparent gain of 310 jobs in Transportation Equipment was the result of a firm being administratively reclassified out of Miscellaneous Manufacturing, which lost 430 jobs. Industries with actual job losses of over 100 jobs were Primary Metals, which lost 300, and Chemicals, which lost 140.



Food Manufacturing now makes up over 40 percent of Kent County's 4,750 jobs in Manufacturing. Paper Manufacturing is the county's second-largest manufacturing subsector, with 730 workers. In Sussex County, Food is very dominant, with almost 70 percent of the county's 11,200

jobs in Manufacturing. Chemical Manufacturing is the second-largest employer in the sector, but it is far smaller with 570 workers there. In New Castle County, Computer and Electronic Product Manufacturing employs more than any other subsector, with 2,630 of the county's 11,200 workers in Manufacturing. Chemical Manufacturing is the next largest employer, with 1,840 workers.

Manufacturing is underrepresented in Delaware. There was 6.1 percent of the state's total workforce employed in the Manufacturing sector at the end of 2013, compared with 8.9 percent nationally. Its location quotient of 0.68 is one of the lowest of all state industry sectors.

### **17. Other Services**

This industry sector, comprised of such varied services as car repair, cosmetology, civic organizations, and private household employment, would have gained 110 jobs except for an administrative change that moved 620 private home health care providers out of the Private Household subsector and into the Health Care and Social Assistance industry sector. New Castle County was most affected by this change, losing 350 jobs in this sector. Average pay there was \$29,544 in

2013, an increase of 4.3 percent over 2012. Sussex County employment fell by 140 jobs. Wages there were \$25,980 on average, an increase of 3.8 percent from 2012. Kent County saw little change, losing 10 jobs. Pay there averaged \$25,008 in 2013, a 4.4 percent increase over 2012.

There are four subsectors in Other Services. The Repair and Maintenance subsector has the highest average wage at \$41,668, 3.2 percent above the 2012 average. It gained 45 jobs in 2013. The subsector Personal and Laundry Services had job levels unchanged from the 2012 level of 4,500 jobs. Average pay there was \$23,428, up by 0.8 percent from the 2012 average. The subsector Religious, Grantmaking, Civic, Professional and Similar Organizations saw an increase of 60 jobs in 2013. The December job total of 4,760 does not include most employees at religious establishments, who fall outside the unemployment insurance (UI) system. We estimate that there are over 7,000 people in that category. Wages for UI-covered workers in this subsector averaged \$24,804 in 2013, 2.5 percent higher than in 2012. The Private Household subsector lost 620 jobs due to the administrative change described

above. Average pay was \$24,944, 32.7 percent higher than in 2012. It would appear that the home health care providers were lower paid than other Private Household workers.

### **18. Management of Companies and Enterprises**

For the third consecutive year, this industry sector, whose function is to act as headquarters for a firm's overall operation, lost more jobs than any other sector in Delaware. The loss of 1,890 jobs in 2013 put total employment at 5,490; at the end of 2010, it had 9,620 jobs. These jobs pay more than any other sector in the state. The 2013 average was \$143,592. This was up by 11.1 percent from 2012, even in the face of large job losses. Ninety percent of the jobs, and all of the job losses, were in New Castle County. Kent County increased employment in this sector by 15 to 200 jobs, while employment in Sussex County held steady at 170 jobs. There are no subsectors in this industry.

This industry sector has gone from being overrepresented in Delaware to underrepresented. It makes up 1.3 percent of the state's employment, and 1.5 percent of the nation's, for a location quotient of 0.85.

## Industry Wages and Job Change Table

| NAICS | Industry                                      | 2013<br>Avg.<br>Wage | 2012-13<br>Wage<br>Change | 2013    | 2012    | 2011    | 2012-13<br>Job<br>Change | 2011-12<br>Job<br>Change |
|-------|---|----------------------|---------------------------|---------|---------|---------|--------------------------|--------------------------|
|       | Total Covered Employment                      | \$52,021             | 0.6%                      | 420,651 | 412,170 | 406,460 | 8,481                    | 5,710                    |
| 22    | Utilities                                     | \$98,436             | 3.2%                      | 2,090   | 2,090   | 1,970   | 0                        | 120                      |
| 23    | Construction                                  | \$51,736             | 3.9%                      | 21,020  | 20,660  | 20,240  | 360                      | 420                      |
| 236   | Construction of buildings                     | \$56,600             | 5.4%                      | 4,680   | 4,620   | 4,530   | 60                       | 90                       |
| 237   | Heavy and civil engineering construction      | \$48,352             | 3.5%                      | 3,870   | 3,710   | 3,870   | 160                      | -160                     |
| 238   | Specialty trade contractors                   | \$50,928             | 3.3%                      | 12,470  | 12,330  | 11,840  | 140                      | 490                      |
| 31    | Manufacturing                                 | \$58,052             | 1.6%                      | 25,480  | 25,740  | 25,460  | -260                     | 280                      |
| 311   | Food manufacturing                            | \$34,068             | 2.9%                      | 8,840   | 8,650   | 8,360   | 190                      | 290                      |
| 312   | Beverage and tobacco product manufacturing    | \$58,096             | -15.7%                    | 270     | 240     | 240     | 30                       | 0                        |
| 313   | Textile mills                                 | \$76,340             | -1.1%                     | 540     | 560     | 570     | -20                      | -10                      |
| 314   | Textile product mills                         | \$44,516             | 4.4%                      | 90      | 90      | 90      | 0                        | 0                        |
| 315   | Apparel manufacturing                         | \$28,628             | 16.0%                     | 110     | 170     | 150     | -60                      | 20                       |
| 321   | Wood product manufacturing                    | \$37,656             | -2.8%                     | 340     | 300     | 300     | 40                       | 0                        |
| 322   | Paper manufacturing                           | \$58,760             | -1.8%                     | 760     | 810     | 820     | -50                      | -10                      |
| 323   | Printing and related support activities       | \$45,156             | 1.6%                      | 670     | 690     | 730     | -20                      | -40                      |
| 324   | Petroleum and coal products manufacturing     | \$113,184            | -1.7%                     | 640     | 680     | 690     | -40                      | -10                      |
| 325   | Chemical manufacturing                        | \$86,324             | 2.3%                      | 2,560   | 2,700   | 2,520   | -140                     | 180                      |
| 326   | Plastics and rubber products manufacturing    | \$59,980             | 1.1%                      | 1,710   | 1,600   | 1,620   | 110                      | -20                      |
| 327   | Nonmetallic mineral product manufacturing     | \$47,308             | 5.1%                      | 500     | 460     | 560     | 40                       | -100                     |
| 331   | Primary metal manufacturing                   | \$70,964             | 2.0%                      | 340     | 640     | 630     | -300                     | 10                       |
| 332   | Fabricated metal product manufacturing        | \$52,732             | 1.8%                      | 1,570   | 1,600   | 1,630   | -30                      | -30                      |
| 333   | Machinery manufacturing                       | \$56,812             | 3.2%                      | 670     | 660     | 640     | 10                       | 20                       |
| 334   | Computer and electronic product manufacturing | \$92,116             | -0.4%                     | 2,800   | 2,820   | 2,980   | -20                      | -160                     |
| 335   | Electrical equipment and appliance mfg.       | \$97,712             | 4.1%                      | 680     | 650     | 590     | 30                       | 60                       |
| 336   | Transportation equipment manufacturing        | \$62,608             | 8.1%                      | 920     | 610     | 610     | 310                      | 0                        |
| 337   | Furniture and related product manufacturing   | \$43,360             | 4.8%                      | 740     | 680     | 700     | 60                       | -20                      |
| 339   | Miscellaneous manufacturing                   | \$53,884             | -1.5%                     | 720     | 1,150   | 1,100   | -430                     | 50                       |
| 42    | Wholesale trade                               | \$78,960             | -2.9%                     | 12,340  | 12,410  | 12,500  | -70                      | -90                      |
| 423   | Merchant wholesalers, durable goods           | \$57,540             | 2.0%                      | 5,150   | 5,130   | 4,870   | 20                       | 260                      |
| 424   | Merchant wholesalers, nondurable goods        | \$98,548             | -7.7%                     | 5,170   | 5,140   | 5,360   | 30                       | -220                     |
| 425   | Electronic markets and agents and brokers     | \$83,128             | 6.7%                      | 2,020   | 2,140   | 2,270   | -120                     | -130                     |
| 44    | Retail Trade                                  | \$26,340             | 0.7%                      | 54,720  | 53,070  | 53,200  | 1,650                    | -130                     |
| 441   | Motor vehicle and parts dealers               | \$44,388             | 1.8%                      | 6,830   | 6,510   | 6,440   | 320                      | 70                       |
| 442   | Furniture and home furnishings stores         | \$32,788             | 1.9%                      | 2,030   | 1,950   | 2,060   | 80                       | -110                     |
| 443   | Electronics and appliance stores              | \$31,620             | -1.6%                     | 2,200   | 2,080   | 2,140   | 120                      | -60                      |
| 444   | Building material and garden supply stores    | \$31,208             | 1.4%                      | 4,410   | 4,170   | 4,260   | 240                      | -90                      |

## Industry Wages and Job Change Table

| NAICS | Industry                                      | 2013<br>Avg.<br>Wage | 2012-13<br>Wage<br>Change | 2013   | 2012   | 2011   | 2012-13<br>Job<br>Change | 2011-12<br>Job<br>Change |
|-------|---|----------------------|---------------------------|--------|--------|--------|--------------------------|--------------------------|
| 445   | Food and beverage stores                      | \$21,332             | -3.8%                     | 9,890  | 9,170  | 8,780  | 720                      | 390                      |
| 446   | Health and personal care stores               | \$34,064             | 2.7%                      | 3,780  | 3,680  | 3,630  | 100                      | 50                       |
| 447   | Gasoline stations                             | \$19,788             | 0.7%                      | 2,390  | 2,320  | 2,110  | 70                       | 210                      |
| 448   | Clothing and clothing accessories stores      | \$17,128             | 1.1%                      | 6,320  | 6,380  | 6,290  | -60                      | 90                       |
| 451   | Sporting goods, hobby, book and music stores  | \$19,360             | -0.6%                     | 1,850  | 1,790  | 1,820  | 60                       | -30                      |
| 452   | General merchandise stores                    | \$19,612             | 1.8%                      | 11,060 | 11,210 | 11,580 | -150                     | -370                     |
| 453   | Miscellaneous store retailers                 | \$19,964             | -3.9%                     | 2,850  | 2,800  | 2,850  | 50                       | -50                      |
| 454   | Nonstore retailers                            | \$42,264             | -0.3%                     | 1,120  | 1,020  | 1,240  | 100                      | -220                     |
| 48    | Transportation and warehousing                | \$45,652             | 1.2%                      | 15,380 | 13,720 | 12,750 | 1,660                    | 970                      |
| 481   | Air transportation                            | \$111,716            | 3.9%                      | 120    | 110    | 110    | 10                       | 0                        |
| 484   | Truck transportation                          | \$47,468             | 4.1%                      | 2,330  | 2,280  | 2,300  | 50                       | -20                      |
| 485   | Transit and ground passenger transportation   | \$28,600             | 2.3%                      | 3,030  | 2,980  | 2,850  | 50                       | 130                      |
| 488   | Support activities for transportation         | \$55,552             | 6.5%                      | 2,240  | 2,370  | 2,240  | -130                     | 130                      |
| 491   | Postal Service                                | \$59,028             | 2.0%                      | 1,960  | 1,820  | 1,850  | 140                      | -30                      |
| 492   | Couriers and Messengers                       | \$42,196             | 2.8%                      | 1,590  | 1,510  | 1,460  | 80                       | 50                       |
| 493   | Warehousing and storage                       | \$43,468             | -8.1%                     | 4,050  | 2,600  | 1,880  | 1,450                    | 720                      |
| 51    | Information                                   | \$61,676             | 3.2%                      | 5,400  | 5,560  | 5,890  | -160                     | -330                     |
| 511   | Publishing industries, except Internet        | \$54,520             | 1.3%                      | 900    | 910    | 930    | -10                      | -20                      |
| 512   | Motion picture and sound recording industries | \$21,208             | 3.0%                      | 320    | 350    | 280    | -30                      | 70                       |
| 515   | Broadcasting, except Internet                 | \$45,464             | 1.0%                      | 310    | 290    | 270    | 20                       | 20                       |
| 517   | Telecommunications                            | \$64,420             | 5.0%                      | 2,240  | 2,350  | 2,760  | -110                     | -410                     |
| 518   | ISPs, search portals, and data processing     | \$79,664             | 2.5%                      | 1,320  | 1,370  | 1,360  | -50                      | 10                       |
| 519   | Other information services                    | \$44,932             | 30.3%                     | 320    | 290    | 290    | 30                       | 0                        |
| 52    | Finance and insurance                         | \$89,668             | 3.6%                      | 39,280 | 38,270 | 37,060 | 1,010                    | 1,210                    |
| 522   | Credit intermediation and related activities  | \$85,780             | 3.5%                      | 26,550 | 25,470 | 24,740 | 1,080                    | 730                      |
| 523   | Securities, commodity contracts, investments  | \$120,828            | 9.8%                      | 5,910  | 5,540  | 5,210  | 370                      | 330                      |
| 524   | Insurance carriers and related activities     | \$78,596             | 1.3%                      | 6,810  | 6,900  | 6,790  | -90                      | 110                      |
| 525   | Funds, trusts, and other financial vehicles   | \$159,652            | -3.2%                     | 20     | 360    | 320    | -340                     | 40                       |
| 53    | Real estate and rental and leasing            | \$42,836             | 1.4%                      | 5,530  | 5,270  | 5,380  | 260                      | -110                     |
| 531   | Real estate                                   | \$42,600             | 3.0%                      | 4,260  | 4,050  | 4,170  | 210                      | -120                     |
| 532   | Rental and leasing services                   | \$43,536             | -3.4%                     | 1,260  | 1,210  | 1,210  | 50                       | 0                        |
| 54    | Professional and technical services           | \$94,372             | -2.9%                     | 29,090 | 27,880 | 26,670 | 1,210                    | 1,210                    |
| 55    | Management of companies and enterprises       | \$143,592            | 11.1%                     | 5,490  | 7,380  | 7,980  | -1,890                   | -600                     |
| 56    | Administrative and waste services             | \$33,104             | -1.8%                     | 26,060 | 23,720 | 23,420 | 2,340                    | 300                      |
| 561   | Administrative and support services           | \$31,988             | -2.1%                     | 24,710 | 22,410 | 22,070 | 2,300                    | 340                      |
| 562   | Waste management and remediation services     | \$51,376             | 2.4%                      | 1,350  | 1,310  | 1,350  | 40                       | -40                      |

## Industry Wages and Job Change Table

| NAICS | Industry                                     | 2013<br>Avg.<br>Wage | 2012-13<br>Wage<br>Change | 2013   | 2012   | 2011   | 2012-13<br>Job<br>Change | 2011-12<br>Job<br>Change |
|-------|--|----------------------|---------------------------|--------|--------|--------|--------------------------|--------------------------|
| 61    | Educational services                         | \$53,456             | 2.2%                      | 34,890 | 34,640 | 34,340 | 250                      | 300                      |
| 62    | Health care and social assistance            | \$49,828             | 0.1%                      | 67,470 | 65,620 | 64,100 | 1,850                    | 1,520                    |
| 621   | Ambulatory health care services              | \$58,504             | -1.7%                     | 19,410 | 18,950 | 18,820 | 460                      | 130                      |
| 622   | Hospitals                                    | \$64,516             | 2.7%                      | 23,210 | 22,940 | 22,480 | 270                      | 460                      |
| 623   | Nursing and residential care facilities      | \$33,300             | 3.1%                      | 11,310 | 11,360 | 10,870 | -50                      | 490                      |
| 624   | Social assistance                            | \$25,936             | -1.6%                     | 13,540 | 12,370 | 11,930 | 1,170                    | 440                      |
| 71    | Arts, entertainment, and recreation          | \$26,500             | -3.4%                     | 7,520  | 7,660  | 7,940  | -140                     | -280                     |
| 711   | Performing arts and spectator sports         | \$36,852             | -14.9%                    | 530    | 560    | 650    | -30                      | -90                      |
| 712   | Museums, historical sites, zoos, and parks   | \$31,172             | 2.5%                      | 830    | 670    | 800    | 160                      | -130                     |
| 713   | Amusements, gambling, and recreation         | \$25,012             | -2.6%                     | 6,170  | 6,430  | 6,490  | -260                     | -60                      |
| 72    | Accommodation and food services              | \$16,848             | 0.4%                      | 34,580 | 33,740 | 32,790 | 840                      | 950                      |
| 721   | Accommodation                                | \$21,976             | 1.4%                      | 2,660  | 2,850  | 2,910  | -190                     | -60                      |
| 722   | Food services and drinking places            | \$16,376             | 0.4%                      | 31,920 | 30,880 | 29,880 | 1,040                    | 1,000                    |
| 81    | Other services, except public administration | \$28,568             | 4.5%                      | 13,160 | 13,670 | 13,000 | -510                     | 670                      |
| 811   | Repair and maintenance                       | \$41,668             | 3.2%                      | 3,330  | 3,280  | 3,180  | 50                       | 100                      |
| 812   | Personal and laundry services                | \$23,428             | 0.8%                      | 4,500  | 4,500  | 4,270  | 0                        | 230                      |
| 813   | Membership associations and organizations    | \$24,804             | 2.5%                      | 4,760  | 4,690  | 4,610  | 70                       | 80                       |
| 814   | Private Households                           | \$24,944             | 32.7%                     | 580    | 1,200  | 940    | -620                     | 260                      |
| 92    | Public Administration                        | \$51,320             | -0.1%                     | 19,890 | 19,830 | 20,020 | 60                       | -190                     |

# Delaware Industry Seasonally Adjusted Employment Index

The Current Employment Statistics (CES) program is a Federal/State cooperative program that produces payroll employment, hours and earnings data for states and areas. This section will focus on Delaware industry employment. From the beginning of the last recession

in December 2007 through the recovery to December 2013, Delaware Total Nonfarm payroll employment declined by 8,000 jobs, a reduction of 1.8 percent. Of Delaware's growing industries, *Education & Health Services* and *Leisure & Hospitality* have had

rather robust growth. Of Delaware's declining industries, there are three that stand out from the rest: the *Information*, *Construction*, and *Manufacturing* industries have all declined more than 20 percent since December 2007.

## Growing Delaware Industries (December 2007 to December 2013):

| Industry                    | Jobs  | % Increase |
|-----------------------------|-------|------------|
| Education & Health Services | 9,000 | 14.7%      |
| Leisure & Hospitality       | 4,200 | 10.3%      |
| Government                  | 1,200 | 1.9%       |

### **Education & Health Services:**

The CES supersector industry Education & Health Services includes only private education. The overwhelming majority of employment in this supersector is in Health Services comprising around 88.5 percent of the employment with the other 11.5 percent in Education. Government education, such as public schools and universities, is found in the government sector. From December 2007 to December 2013, the Education & Health Services supersector has had the largest increase in employment of all Delaware industry sectors of the economy, increasing by 14.7 percent. Employment in the Education & Health Services sector grew even during the recession. From December 2007 through June 2009, the months the U.S. economy was officially in recession, Education & Health Services had created 2,400

jobs. The only other industries to have created jobs during the recession were Government, up 400 jobs, and Leisure and Hospitality, up 300 jobs.

### **Leisure & Hospitality:**

Leisure & Hospitality had the second largest percentage increase in employment over the period of December 2007 to December 2013, increasing by 10.3 percent. Employment grew by 4,200 jobs in the Leisure & Hospitality sector. Arts, Entertainment, and Recreation comprises one fifth of all jobs in Leisure & Hospitality and was up 300 jobs, and Accommodation and Food Services, which comprises the other four-fifths of jobs in Leisure & Hospitality, was up 3,900 jobs. Leisure & Hospitality hit a low point in jobs February 2010 at 40,000, but then impressively expanded by 3,700 jobs over the next nine months to reach a total

of 43,700 jobs by November 2010. It added an additional 1,200 job to total 44,900 jobs by December 2013.

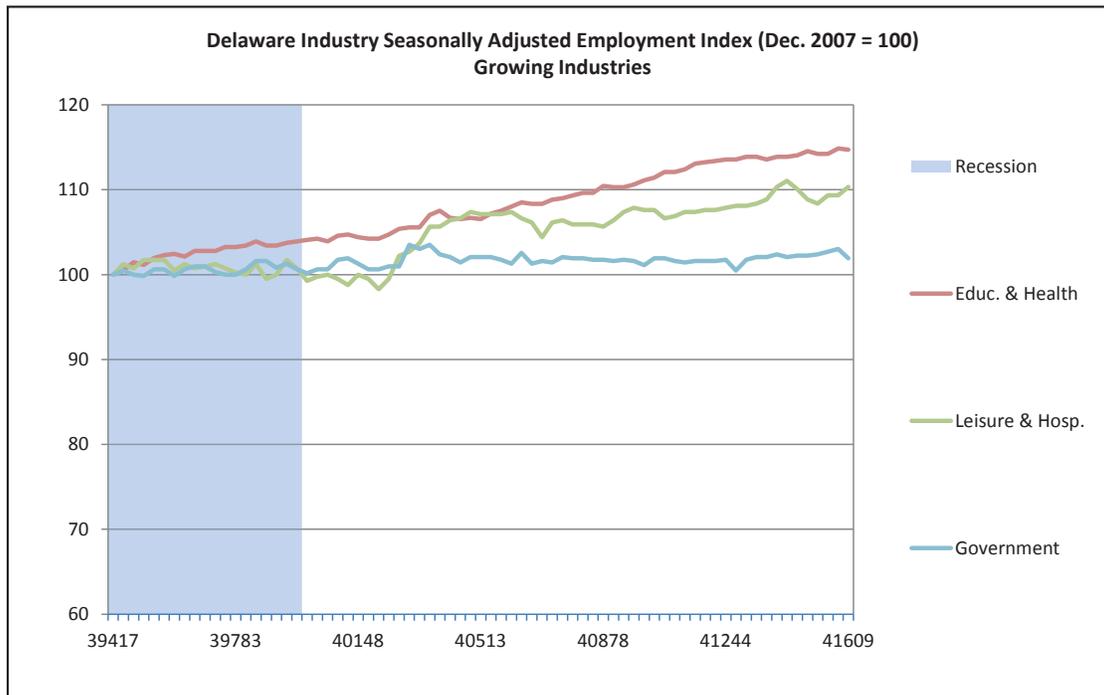
### **Government:**

Government was the third and final industry that had a positive increase in employment, growing by 1.9 percent or 1,200 jobs, from December 2007 to December 2013. Federal, State, and Local Government make up the Government category. Unlike State and Local Government employment, Federal Government employment is not seasonally adjusted by the Bureau of Labor Statistics for Delaware, however, because the comparison is from December to December there is no seasonality in Federal Government employment to cause concern. Federal Government employment decreased by 100 jobs from December 2007 to December 2013. There was a temporary spike in employment in 2010 due to

a temporary hiring of Census workers, but the temporary increase in employment only lasted from March 2010 to August 2010, and by September 2010 employment had returned to its pre-census level. State Government employment also declined by 100 jobs from December 2007 to December 2013. There were 31,900 State Government jobs in December

2007, and by December 2013 there were 31,800 jobs. Local Government employment increased 1,600 jobs over the six year time period under consideration. Both State and Local Government employment contains educational employment. However, like Federal Government employment, State and Local Government Educational employment are not

seasonally adjusted. But again, because the comparison is from December to December there is no seasonal fluctuation in employment to cause concern with such a comparison. From December 2007 to December 2013, there was no employment change in State Government Education, although Local Government Education increased by 1,600.



Source: Delaware Department of Labor in cooperation with the US Department of Labor, Bureau of Labor Statistics.

**Declining Delaware Industries (December 2007 to December 2013):**

| Industry                           | Jobs   | % Decrease |
|------------------------------------|--------|------------|
| Financial Activities               | -600   | -1.3%      |
| Other Services                     | -300   | -1.5%      |
| Professional & Business Services   | -1,200 | -2.0%      |
| Trade, Transportation, & Utilities | -4,200 | -5.1%      |
| Manufacturing                      | -7,900 | -23.9%     |
| Construction                       | -6,400 | -24.0%     |
| Information                        | -1,800 | -25.4%     |

**Financial Activities:**

The overwhelming majority of Financial Activities declined by 1.3 percent, or 600 jobs. It had the smallest percentage decline of all the declining industries from December 2007 through December 2013. This industry is comprised of Finance and Insurance, and Real Estate, Rental, and Leasing. Although Real Estate, Rental, and Leasing comprise just thirteen percent of the all employment in Financial Activities, its employment fell by 1,000 jobs. Real Estate, Rental, and Leasing declined throughout the recession and hit its low point of 5,300 jobs in October 2011, February 2012, and June 2013. As of December 2013 it had 5,500 jobs, only 200 above its low.

**Other Services:**

The Other Services industry is comprised of individuals engaged in activities such as the repair and maintenance of machinery, personal care and laundry services, religious activities, and advocacy groups. After losing 1,000 jobs between December 2007 and its low point in February 2010, Other Services recovered somewhat over the next several months and employment stabilized over the next two years. For the period of December 2007 to December 2013, Other Services was down 1.5 percent, or 300 jobs.

**Professional & Business Services:**

Professional & Business Services was hit hard by the recession, losing over 11 percent of its employment by November 2009, a reduction of 7,000 jobs. But it has recovered part of those employment declines to be

down only 1,200 jobs, or 2.0 percent, from December 2007 to December 2013. Professional & Business Services had an employment level of 61,300 in December 2007 and is comprised of three smaller industry groups. One of the smaller industry groups is Management of Companies and Enterprises. This industry has been in decline since before the recession, dating back to 2005. It had an annual average employment of 12,500 in 2005 and by 2013 the annual average employment was only 6,000. There has been a rather steady decline in this industry from 2005 through 2013, although the rate of decline was more rapid in the year 2010 than in other years. Then we have the Professional and Technical Services industry group. Despite falling 2,200 jobs from an employment level of 25,800 in December 2007 to its low point of 23,600 in December 2009 and February 2010, it has since recovered, gaining 5,800 jobs to be at a level of 29,400 jobs by December 2013. The final industry group within Professional & Business Services is Administrative and Support and Waste Management, which has gained 200 jobs from December 2007 to December 2013.

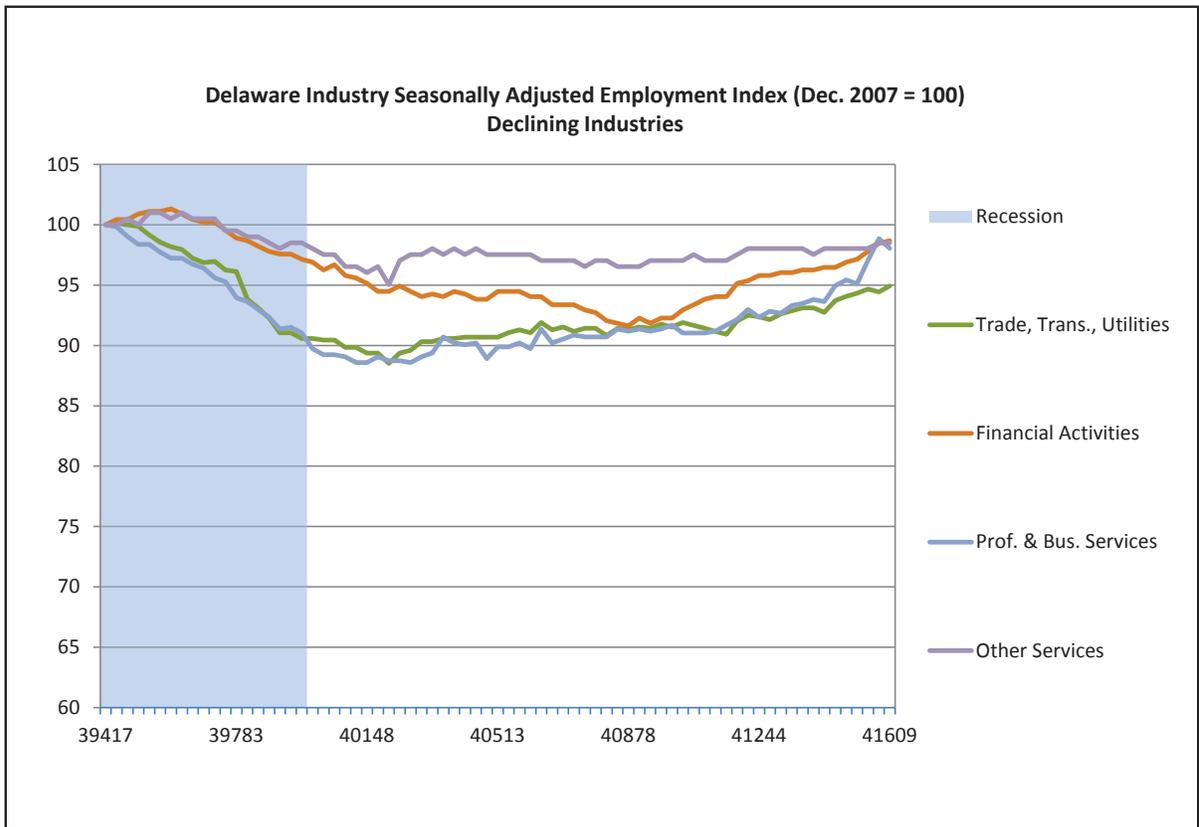
**Trade, Transportation, & Utilities:**

Trade, Transportation, & Utilities is last on our list of industries that has only suffered a modest decline in employment since the beginning of the last recession, down 5.1 percent. Trade, Transportation, and Utilities is Delaware's largest supersector industry in terms of employment. It is comprised of Wholesale Trade, Retail Trade, and Transportation

and Utilities. Wholesale Trade employment peaked right before the recession at 15,200 jobs in August 2007 and was very near its all-time high when the recession began in December 2007 at 14,800 jobs. The recession took its toll on Wholesale Trade with the industry losing 1,700 jobs during the recession and an additional 900 job since. From December 2007 to December 2013,



jobs in Wholesale Trade are down 17.5 percent. Retail Trade was also impacted greatly by the recession, losing 4,900 jobs; however, unlike Wholesale Trade, it has recovered 2,400 of the jobs that were lost, to have a total of 51,900 jobs as of December 2013. Transportation and Utilities, after initially losing jobs during the recession, had 800 more jobs in December 2013 than in 2007.



Source: Delaware Department of Labor in cooperation with the US Department of Labor, Bureau of Labor Statistics.

**Manufacturing:**

From December 2007 to December 2013, Manufacturing jobs have declined by 23.9 percent or 7,900 jobs. Delaware jobs in Manufacturing have been declining for more than a decade and the national trend of Manufacturing job losses dates back at least 30 years or more. With the recession and the loss of automobile manufacturing in the state, the rate of job decline was accelerated. During the recession alone, Manufacturing jobs declined by 16.7 percent. Since November 2010, the loss of Manufacturing jobs has nearly leveled off, losing only 300 additional jobs to December

2013.

**Construction:**

The Construction industry had the second largest percent decline in employment from December 2007 to December 2013, declining 24.0 percent. Construction employment had been declining before the recession began, due to job losses related to the housing bust that began in the middle of 2006, but this accelerated during the recession. By the end of the recession one out of every four construction jobs in the state had been lost. After further job losses in 2009, Construction jobs looked to have recovered by the end of the first quarter of 2011, only to

fall again to a low of 18,100 jobs. Since then, 2,200 Construction jobs have been created to get to a total of 20,300 jobs as of December 2013.

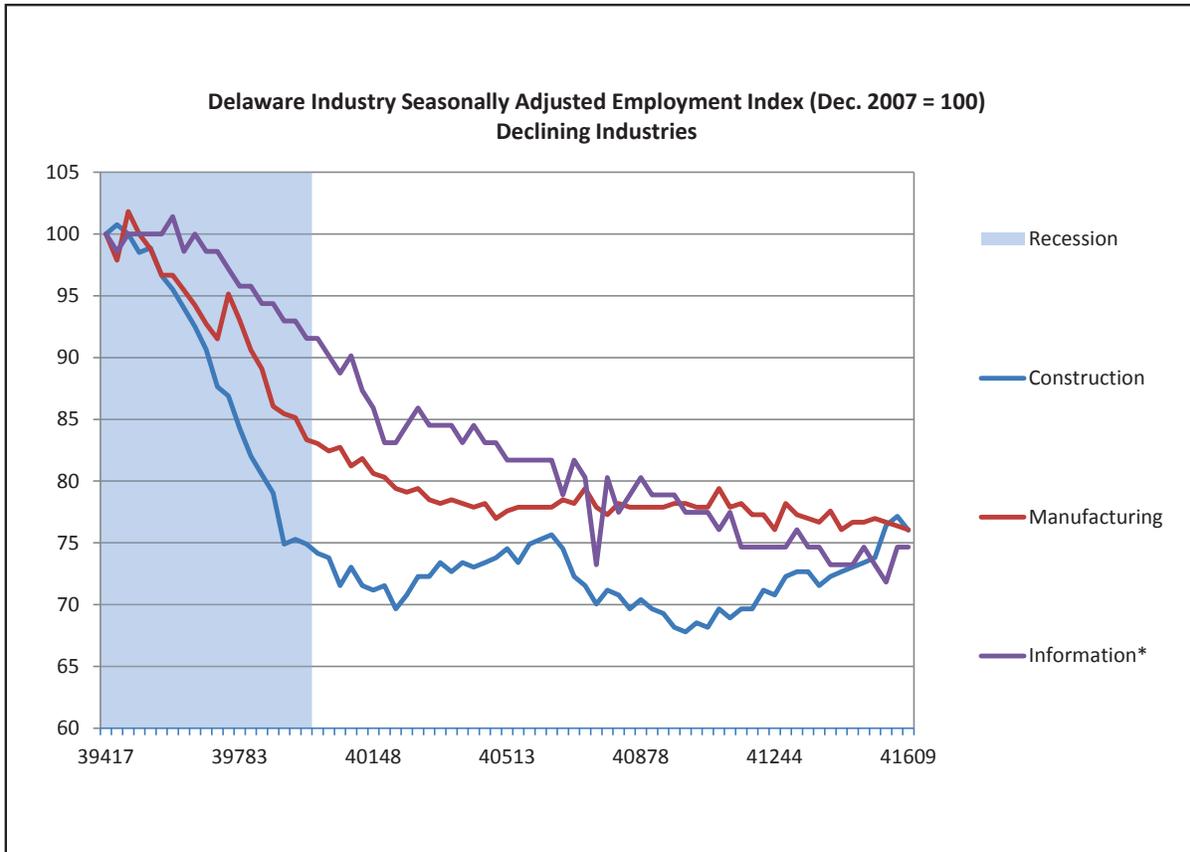
**Information:**

Information had the largest percent decline in employment from December 2007 to December 2013, declining by 25.4 percent. The decline in the Information industry was not as quick as in Manufacturing or Construction during the recession, but Information jobs have been in steady decline throughout the recovery. Some Construction jobs have come back and Manufacturing jobs losses

have stabilized, but the Information industry jobs are still trending down. The Information industry is not seasonally adjusted, which

makes comparing different months problematic. Looking at the annual average employment for 2011, 2012, and 2013, one can see declining

total industry employment of 5,700, 5,500, and 5,300 jobs, respectively.



Note: \* Not Seasonally Adjusted Industry

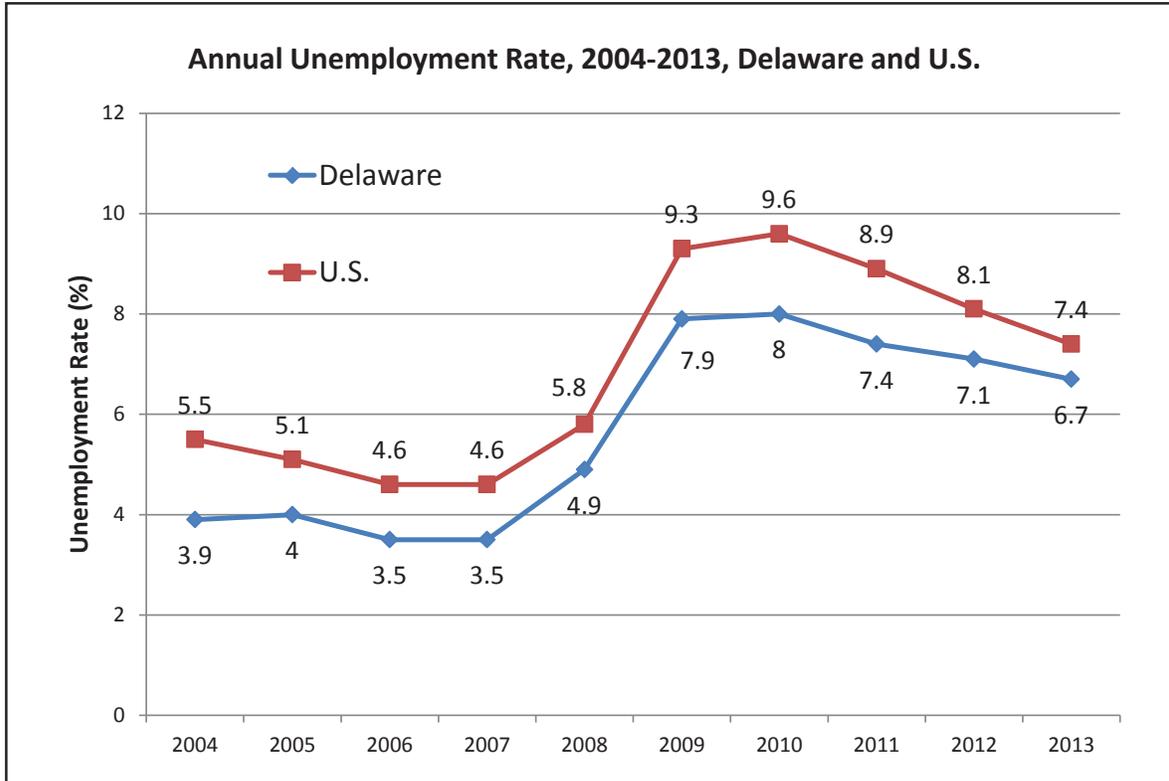
Source: Delaware Department of Labor in cooperation with the US Department of Labor, Bureau of Labor Statistics.

# The Unemployment Rate

The unemployment rate is a key economic indicator of the health of the economy and one that is widely watched by the public. The Local Area Unemployment Statistics (LAUS) program is a state and

federal cooperative program that generates the unemployment rate for the state, counties, and cities with population over 25,000. The unemployment rate is measured by dividing the number of unemployed

people by the total labor force. To be considered unemployed, one has to not be working, actively seeking employment, and available to work during the month.



In 2013, Delaware’s annual unemployment rate of 6.7 percent was 0.7 of a percentage point lower than the national average of 7.4 percent. In addition, 2013 marked the third straight year of decline in Delaware’s annual unemployment rate since 2010, when the unemployment rate peaked at 8.0 percent. The U.S. unemployment rate peaked at an annual rate of 9.6 percent in 2010 following the most

severe post World War II recession, which officially ended in June of 2009.

Delaware’s unemployment rate tends to reflect the national unemployment rate. As the national rate declines Delaware’s rate tends to decline and as the national rate increases Delaware rate tends to increase as well. Although the Delaware unemployment rate tends to

reflect movements in the U.S. rate, Delaware’s unemployment rate has been on average 1.5 percentage points lower than the U.S. rate since 1982. Delaware’s annual unemployment rate has not exceeded the U.S. rate since 1981. Even with recent declines, Delaware’s annual unemployment rate has remained substantially above its pre-recession rate of 3.5 percent in 2007.

# Comparative Unemployment Rates

The Local Area Unemployment Statistics (LAUS) program is an important Federal and State government cooperative program

that produces monthly and annual data on employment, unemployment, the unemployment rate, and the labor force for States,

counties, and cities. The state unemployment rate data below are produced from the LAUS program.

## Delaware and its Neighboring States Annual Average Unemployment Rate

Delaware's annual average unemployment rate of 6.7% in 2013 was ranked as the 23rd lowest rate in the nation, tied with Maine and Wisconsin. Of Delaware's neighboring states of Maryland, New Jersey, and Pennsylvania, only Maryland had a higher ranking. Maryland's annual average unemployment rate ranked 22nd

lowest in the nation, followed by Delaware at 23rd, Pennsylvania at 31st, and New Jersey at 41st.

Delaware's unemployment rate fell by 0.4 percentage point from 2012 to 2013. Among Delaware's neighboring states, New Jersey's unemployment rate declined the most, falling by 1.1 percent.

Pennsylvania's rate had the second best improvement in its unemployment rate, declining 0.5 percent points. Maryland had the smallest improvement in its unemployment rate, declining 0.3 percent points.

### Comparative Annual Unemployment Rates

|               | Unemployment Rate |      | National Ranking* |        |
|---------------|-------------------|------|-------------------|--------|
|               | 2012              | 2013 | 2012              | 2013   |
| Delaware      | 7.1               | 6.7  | 22 (t)            | 23 (t) |
| Maryland      | 6.9               | 6.6  | 18 (t)            | 22     |
| New Jersey    | 9.3               | 8.2  | 48                | 41 (t) |
| Pennsylvania  | 7.9               | 7.4  | 31                | 31     |
| United States | 8.1               | 7.4  | --                | --     |

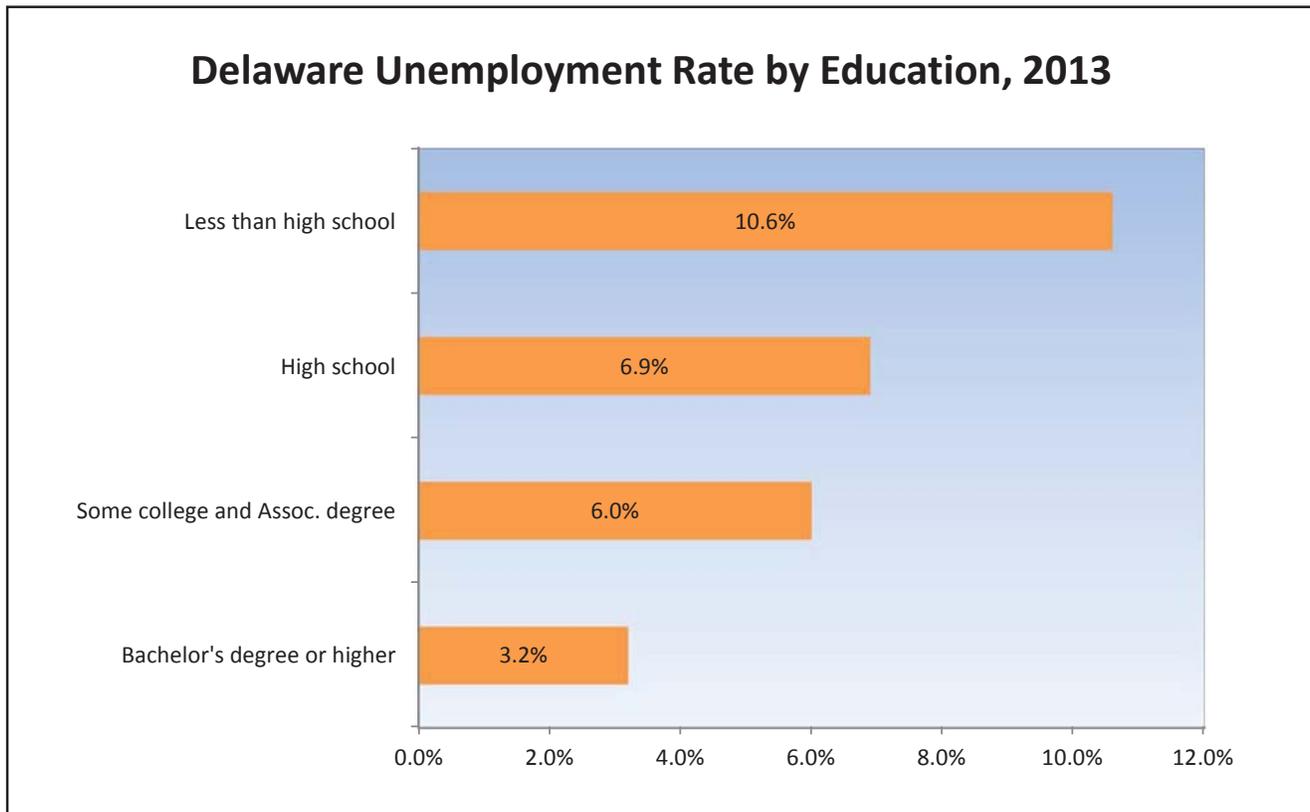
\* Lower ranking indicates a lower rate. (t) indicates ranking was tied with other state(s).

# The Unemployment Rate by Educational Attainment

The benefits to educational attainment are not only that, in general, those with more education earn higher wages than those with less education, but also that the amount of educational attainment one acquires impacts the likelihood that one will be unemployed. Those with less education are more likely on

average to be unemployed than those with more education. The graph below breaks out the unemployment rate by the highest level of education an individual has obtained for persons 25 years of age and older. Data on the unemployment rate by educational attainment is obtained from unpublished Current

Population Survey data. The average unemployment rate for all Delaware residents in 2013 was 6.7 percent. The average unemployment rate in 2013 for those Delaware residents with less than a high school diploma was 10.6 percent, and those with a bachelor's degree or higher had an unemployment rate of 3.2 percent.



Data are for persons 25 and over  
Source: U.S. Bureau of Labor Statistics, Current Population Survey

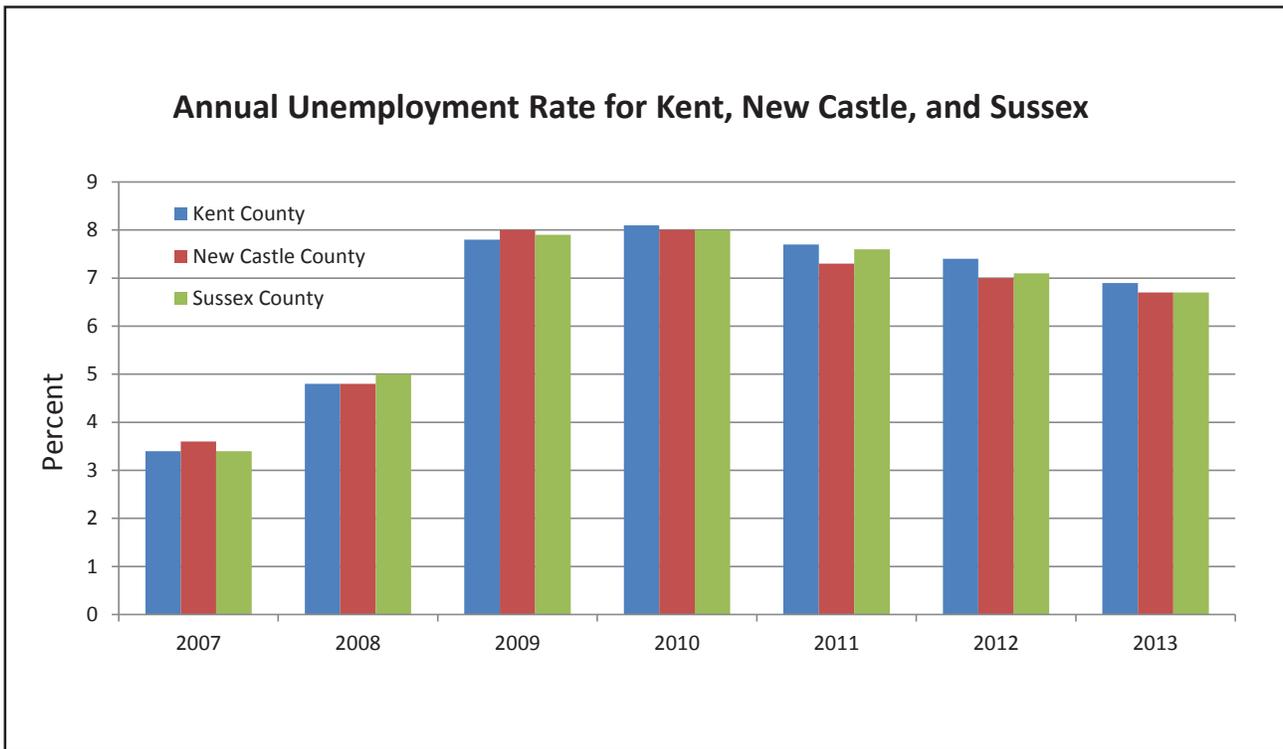
# County Unemployment Rates

In 2013, New Castle County and Sussex County both had annual unemployment rates of 6.7 percent. New Castle County was down 0.3 percentage points from 7.0 percent in 2012 and Sussex County's rate had fallen 0.4 percentage points from 7.1 percent in 2012. Kent County had the highest rate of the three counties at 6.9 percent in 2013; however, its rate had fallen the most of the three counties, declining

by 0.5 percentage points from 7.4 percent in 2012.

In 2007, New Castle County's unemployment rate exceeded the other two counties at 3.6 percent. But in 2008 with the onset of the recession, Sussex County's unemployment rate was impacted more than Kent or New Castle's, increasing from 3.4 percent in 2007 to 5.0 percent. In

2009, unemployment rates rose by the greatest amount, with the average county rate increasing by 3.0 percentage points from the previous year. Kent County's unemployment rate of 8.1 percent was the peak unemployment rate of all three counties in 2010. County unemployment rates have come down steadily each year since 2010 with Kent County continuing to have the highest rate each year.



# City of Dover Employment and Wages

Located in Kent County, the city of Dover is Delaware's capital and second largest city, with an estimated population of 37,400 in 2013.

Despite it being Delaware's second largest city, there has not been, until now, a detailed industry count of the number of jobs within the city limits. The Quarterly Census of Employment and Wages (QCEW) program collects county and state level data, but QCEW data are not routinely generated at more detailed geographic levels. The Local Area Unemployment Statistics provides Dover data for employment, but this is a residency-based count of employment irrespective of where residents work. Here, we use the QCEW data, combined with information on the physical addresses of employers, to extract data specifically for firms located within the city of Dover.

There are approximately 700 business establishments within the Dover city limits. Kent County, by comparison, has over 3,400 business establishments, and there are approximately 28,500 business establishments statewide. The table on page 28 contains detailed industry employment data for the month of December for the years 2007 to 2013. The wage data are quarterly totals for the 4th quarter of 2007 through 2013. An asterisk (\*) represents data that cannot be released due to employer confidentiality restrictions.

In December 2007, Dover had 26,120 jobs and total wages of \$251

million. The largest Dover industry in terms of employment was State Government, which includes State Government Education, with 5,966 jobs. One out of every five jobs in Dover was in State Government; it was nearly one and a half times larger than Dover's next largest industry, Health Care and Social Assistance, with 4,184 jobs. Retail Trade was the third largest industry with 3,475 jobs, followed by Accommodation and Food Services and Local Government, with 2,573 and 1,534 jobs, respectively. In terms of average quarterly wages for the 4th quarter of 2007, Professional and Technical Services workers earned the most with \$20,606. This was closely followed by Manufacturing with an average quarterly wage of \$18,582. The average quarterly wage for all industries in the city of Dover was \$9,654, which was slightly ahead of Kent County with \$9,354 but well behind Delaware as a whole with \$12,032.

Unless otherwise noted, in the remaining sections employment comparisons are over-the-year December to December changes and wage data comparisons are the changes in wages in the 4th quarter from the 4th quarter of the prior year. In December 2008, Dover employment fell by 1,022 jobs to 25,098, a reduction of 3.9 percent. The recession beginning in December 2007 impacted Dover more than Kent County as a whole. Kent County employment fell only 2.9 percent in December 2008. Industry employment declines in

Dover were particularly strong in Retail Trade with 593, representing 58 percent of the total decline. The next largest employment declines were in Construction with 189, Accommodation and Food Services with 148, and Manufacturing with a decline of 138 jobs. Although overall Dover employment declined in 2008, some Dover industries gained employment during the first year of the recession, such as Health Care and Social Assistance, up 149, Information, up 63, and Wholesale Trade, up 56. Dover wages declined by \$12.1 million in 2008, which represented a 4.8 percent decline from the previous year. Nearly three quarters of the decline was from one industry alone, Manufacturing. Wages in the Manufacturing industry declined by over \$9 million. At the other end of the spectrum, wages in Local Government increased by \$3.8 million. Overall, the average quarterly wage in Dover declined by \$220 in 2008 to \$9,434. Professional and Technical Services had the highest average quarterly wage with \$18,317, followed by Federal Government workers with \$14,524, and Manufacturing with \$13,491.

In 2009, Dover employment fell 624 to 24,474 jobs, a reduction of 2.5 percent, while employment in Kent County fell by 2.9 percent during the same time period. Over-the-year job losses for Dover were greatest in the Accommodation and Food Services industry with an employment decline of 377, a loss of 15.5 percent, and Other Services,

which lost 125 jobs, or 15.2 percent. Federal Government had a gain in employment of 233 jobs. Dover wages increased by \$12.4 million in 2009, more than erasing the drop in wages in 2008. State Government had an increase in wages of \$7.3 million, and Federal Government had a \$2.9 million increase. This was followed by Manufacturing with a \$1.7 million increase, and Health Care and Social Assistance with a \$1.5 million increase. Local Government and Other Services had the largest decline in wages, losing \$1.4 million and \$1.2 million, respectively. Professional and Technical Services had the highest average quarterly wage with \$19,456, followed by Manufacturing and Federal Government with \$15,669 and \$14,081, respectively. The average quarterly wage in Dover increased by \$833 to \$10,267 for all industries. Kent

County had an average quarterly wage of \$9,865; Delaware's average quarterly wage was \$12,467 in the 4th quarter of 2009.

After over-the-year employment declines in 2008 and 2009, Dover's employment increased in 2010 by 1,161 jobs, an increase of 4.7 percent. Kent County employment increased only by 1 percent over the same time period. Over-the-year job gains were greatest in Arts, Entertainment, and Recreation with an increase of 469 jobs. Health Care and Social Assistance was next with

an increase in 237 jobs, followed closely by Accommodation and Food Services with an increase of 236 jobs. Dover wages increased by \$13 million in the final quarter of 2010. The leading industries in terms of wage gains were Health Care and Social Assistances with an increase of \$3.5 million, Arts, Entertainment, and Recreation with an increase of \$3.4 million, and Finance and Insurance with an increase of \$2.6 million. Professional and Technical Services had the greatest decline in wages with a loss of \$1.4 million.



Dover's average quarterly wage increased by \$120 to \$10,387. Professional and Technical Services had the highest average quarterly wage for the fourth quarter of 2010 with \$19,308, followed by Finance and Insurance with \$16,995.

In 2011, Dover employment was nearly unchanged with an increase of 10 jobs. An increase in jobs in the public sector was almost entirely offset by private sector job losses. Total employment in Kent County increased by 1.6 percent in 2011. Industry employment gains in

Dover were led by Administrative and Waste Services, up 196; State Government, up 195, and Retail Trade, up 116 jobs. Industry losses were led by Accommodation and Food Services, down 215; Health Care and Social Assistance, down 141, and Information, down 74. Wages in Dover declined nearly \$9.2 million in 2011. Industries with the largest wage declines were Finance and Insurance, decreasing \$2.2 million, followed closely by Health Care and Social Assistance, down \$2.1 million, and Federal

Government, down \$1.3 million. The average quarterly wage for all Dover industries declined by \$395 to \$9,992.

In 2012, after experiencing little employment growth the previous year, Dover employment increased by 1,005, an increase of 3.9 percent. Private sector employment

grew by 1,151, while public sector employment declined by 146. Employment for Kent County grew by 445 jobs or at a rate of less than 1 percent. The majority of the job gains in 2012 for Dover were in Retail Trade, increasing by 601 jobs. The Retail Trade industry represented nearly 60 percent of all jobs created in Dover. Construction had the next largest amount of new jobs with 266, followed by Other Services, up 157 and Administrative and Waste Services, up 140 jobs. State Government led job decliners losing 110 jobs, followed

by Federal Government jobs, which were down 99. After seeing wages decline the previous year, in 2012 wages were up over \$20.2 million. Wages in Professional and Technical Services were up \$4.6 million, and Construction wages more than doubled over the year, increasing by \$3.4 million. Federal Government wages, on the other hand, declined by \$1.2 million. The average quarterly wage for all industries increased by \$384 to \$10,376. Professional and Technical Services had a huge surge in average quarterly wages, increasing from \$17,522 in 2011 to \$31,780 in 2012. Wholesale Trade had the next highest average quarterly wage with \$18,172.

In 2013, Dover employment declined by 334, giving back some of the job gains it had

made in the previous year. Private sector jobs were down 356, while public sector jobs were nearly flat, up only 22. In percentage terms, Dover employment was down 1.3 percent. Kent County employment grew by 3,061 in 2013 an increase of 4.9 percent. Dover industry job losses were greatest in the Accommodation and Food Services industry, which lost 194. Next, Administrative and Waste Services had the second largest amount of job losses, declining by 110, followed by 104 job losses in Federal Government. Health Care and Social Assistance had the most jobs created with 197, followed by State Government with 154. Dover wages declined by \$5.8 million after being up over \$20 million the previous year. Wages in the Professional and Technical Service industry declined by \$5.9 million

in 2013 after being up nearly \$4.6 million the previous year. Federal Government wages had the next largest decline, falling \$2 million. Health Care and Social Assistance wages were up \$2.4 million and State Government wages increased by nearly \$1.5 million. In 2013, Dover's average quarterly wage declined by \$81 to \$10,295 for all Dover industries. After having a huge surge in average quarterly wages in the Professional and Technical Services industry, wages came back down to a more normal level for this industry with an average quarterly wage of \$17,916, which only ranked 3rd of all Dover industries. Management of Companies and Enterprises, and Finance and Insurance had the top average quarterly wages with \$18,540 and \$18,175, respectively.



## Dover Employment and Wages by Industry

|  | NAICS code | Dec-07 |       | Dec-08 |       | Dec-09 |       | Dec-10 |       | Dec-11 |       | Dec-12 |       | Dec-13 |       |
|--|------------|--------|-------|--------|-------|--------|-------|--------|-------|--------|-------|--------|-------|--------|-------|
|  |  | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl.  | Wages |
| Petroleum and Coal Products Manufacturing                    | 324        | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     |
| Chemical Manufacturing                                       | 325        | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     |
| Plastics and Rubber Products Manufacturing                   | 326        | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     |
| Nonmetallic Mineral Product Manufacturing                    | 327        | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     |
| Primary Metal Manufacturing                                  | 331        | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     |
| Fabricated Metal Product Manufacturing                       | 332        | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     |
| Machinery Manufacturing                                      | 333        | *      | *     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     |
| Computer and Electronic Product Manufacturing                | 334        | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     |
| Electrical Equipment, Appliance, and Component Manufacturing | 335        | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     |
| Transportation Equipment Manufacturing                       | 336        | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | *      | *     | 0      | 0     |
| Furniture and Related Product Manufacturing                  | 337        | *      | *     | *      | *     | *      | *     | *      | *     | *      | *     | *      | *     | *      | *     |
| Miscellaneous Manufacturing                                  | 339        | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | 0      | 0     | *      | *     | *      | *     |

## Dover Employment and Wages by Industry

|   | NAICS code | Dec-07 |            | Dec-08 |            | Dec-09 |            | Dec-10 |            | Dec-11 |            | Dec-12 |            | Dec-13 |            |
|---|------------|--------|------------|--------|------------|--------|------------|--------|------------|--------|------------|--------|------------|--------|------------|
|   |            | Empl.  | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages |
| Wholesale trade   | 42         | 147    | 1,323,337  | 203    | 2,623,073  | 216    | 2,987,649  | 182    | 2,671,583  | 201    | 2,853,722  | 165    | 2,998,339  | 169    | 2,606,233  |
| Merchant Wholesalers, Durable Goods                         | 423        | 135    | 1,294,385  | 148    | 1,628,918  | 153    | 1,817,340  | 126    | 1,497,378  | 148    | 1,671,062  | 111    | 1,587,875  | 114    | 1,662,168  |
| Merchant Wholesalers, Nondurable Goods                      | 424        | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | 48     | 904,611    |
| Wholesale Electronic Markets and Agents and Brokers         | 425        | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          |
| Retail trade  | 44-45      | 3,475  | 19,050,738 | 2,882  | 16,176,110 | 2,885  | 16,534,561 | 2,983  | 17,479,997 | 3,099  | 17,129,875 | 3,700  | 18,471,924 | 3,600  | 17,815,276 |
| Motor Vehicle and Parts Dealers                             | 441        | 363    | 3,899,185  | 284    | 3,109,166  | 286    | 3,312,519  | 367    | 4,318,369  | 343    | 3,892,389  | 379    | 3,912,974  | 307    | 3,402,802  |
| Furniture and Home Furnishings Stores                       | 442        | 63     | 505,808    | 74     | 548,479    | 66     | 444,352    | 54     | 327,417    | 64     | 331,146    | 62     | 313,144    | 60     | 354,672    |
| Electronics and Appliance Stores                            | 443        | 230    | 1,164,045  | 170    | 809,903    | 175    | 732,141    | 166    | 750,035    | 137    | 693,908    | 178    | 761,202    | 221    | 923,377    |
| Building Material and Garden Equipment and Supplies Dealers | 444        | 265    | 1,752,827  | 236    | 1,684,916  | 251    | 1,907,161  | 227    | 1,803,368  | 248    | 1,823,502  | 242    | 1,600,317  | 234    | 1,622,085  |
| Food and Beverage Stores                                    | 445        | 374    | 2,035,973  | 354    | 1,944,199  | 270    | 1,603,722  | 262    | 1,629,330  | 242    | 1,354,974  | 310    | 1,755,689  | 290    | 1,505,335  |
| Health and Personal Care Stores                             | 446        | 216    | 1,383,707  | 111    | 672,109    | 173    | 1,493,709  | 167    | 1,556,315  | 162    | 1,401,856  | 224    | 1,355,066  | 189    | 1,442,514  |
| Gasoline Stations   | 447        | 70     | 404,963    | 67     | 402,013    | 67     | 406,589    | 69     | 390,895    | 71     | 427,553    | 57     | 287,981    | *      | *          |



## Dover Employment and Wages by Industry

|  | NAICS code | Dec-07 |           | Dec-08 |           | Dec-09 |           | Dec-10 |           | Dec-11 |           | Dec-12 |           | Dec-13 |           |
|--|------------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|
|  |  | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl.  | Wages     |
| Couriers and Messengers  | 492        | *      | *         | *      | *         | *      | *         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         |
| Warehousing and Storage  | 493        | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         |
| Information  | 51         | 292    | 2,779,686 | 355    | 3,719,458 | 267    | 3,162,170 | 268    | 3,344,122 | 194    | 2,157,510 | 214    | 2,920,011 | 240    | 2,933,579 |
| Publishing Industries  | 511        | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         |
| Motion Picture and Sound Recording Industries                                | 512        | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         |
| Broadcasting (except Internet)   | 515        | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         |
| Telecommunications   | 517        | 129    | 1,592,750 | 143    | 2,354,785 | 128    | 2,183,510 | 137    | 2,417,146 | 95     | 1,497,850 | 122    | 2,258,226 | 118    | 2,006,453 |
| Internet Service Providers, Web Search Portals, and Data Processing Services | 518        | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         |
| Other Information Services   | 519        | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | 0      | 0         | 0      | 0         |
| Finance and insurance  | 52         | 516    | 5,237,371 | 488    | 5,041,494 | 443    | 5,342,177 | 467    | 7,970,649 | 397    | 5,789,313 | 410    | 6,813,128 | 370    | 6,724,646 |
| Monetary Authorities - Central Bank  | 521        | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         |
| Credit Intermediation and Related Activities                                 | 522        | 341    | 2,627,231 | 335    | 2,704,693 | 292    | 3,343,545 | 283    | 4,735,369 | 276    | 3,360,368 | 250    | 3,005,944 | 230    | 2,913,999 |

## Dover Employment and Wages by Industry

|   | NAICS code | Dec-07 |            | Dec-08 |            | Dec-09 |            | Dec-10 |           | Dec-11 |           | Dec-12 |            | Dec-13 |           |
|---|------------|--------|------------|--------|------------|--------|------------|--------|-----------|--------|-----------|--------|------------|--------|-----------|
|   |            | Empl.  | Wages      | Empl.  | Wages      | Empl.  | Wages      | Empl.  | Wages     | Empl.  | Wages     | Empl.  | Wages      | Empl.  | Wages     |
| Securities, Commodity Contracts, and Other Financial Investments and Related Activities | 523        | 25     | 389,208    | 16     | 199,247    | 11     | 133,300    | 37     | 1,203,626 | *      | *         | 36     | 1,269,162  | 38     | 1,365,234 |
| Insurance Carriers and Related Activities   | 524        | 150    | 2,220,932  | 137    | 2,137,554  | 140    | 1,865,332  | 147    | 2,031,654 | 106    | 1,261,673 | 124    | 2,538,022  | 102    | 2,445,413 |
| Funds, Trusts, and Other Financial Vehicles   | 525        | 0      | 0          | 0      | 0          | 0      | 0          | 0      | 0         | 0      | 0         | 0      | 0          | 0      | 0         |
| Real estate and rental and leasing  | 53         | 276    | 2,237,901  | 245    | 1,773,939  | 241    | 1,653,134  | 154    | 1,470,110 | 121    | 1,115,421 | 135    | 1,303,369  | 163    | 1,537,088 |
| Real Estate   | 531        | 154    | 1,577,893  | 145    | 1,148,261  | 147    | 953,621    | 86     | 822,796   | 59     | 484,652   | 61     | 610,803    | 72     | 679,472   |
| Rental and Leasing Services   | 532        | 122    | 660,008    | 100    | 625,678    | 94     | 699,513    | 68     | 647,314   | 62     | 630,769   | 74     | 692,566    | 91     | 857,616   |
| Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)                    | 533        | 0      | 0          | 0      | 0          | 0      | 0          | 0      | 0         | 0      | 0         | 0      | 0          | 0      | 0         |
| Professional and technical services   | 54         | 636    | 13,181,074 | 574    | 10,446,822 | 531    | 10,525,690 | 477    | 9,094,094 | 551    | 9,613,524 | 455    | 14,184,629 | 470    | 8,289,100 |
| Management of companies and enterprises   | 55         | *      | *          | *      | *          | *      | *          | *      | *         | *      | *         | 130    | 2,222,616  | 139    | 2,564,757 |
| Administrative and waste services   | 56         | 664    | 4,371,289  | 605    | 5,032,661  | 531    | 5,406,294  | 472    | 4,905,112 | 668    | 5,389,696 | 808    | 5,368,605  | 698    | 4,903,524 |
| Administrative and Support Services   | 561        | 664    | 4,371,289  | 605    | 5,032,661  | 531    | 5,406,294  | 472    | 4,905,112 | 668    | 5,389,696 | 808    | 5,368,605  | 698    | 4,903,524 |

## Dover Employment and Wages by Industry

|   | NAICS code | Dec-07 |            | Dec-08 |            | Dec-09 |            | Dec-10 |            | Dec-11 |            | Dec-12 |            | Dec-13 |            |
|---|------------|--------|------------|--------|------------|--------|------------|--------|------------|--------|------------|--------|------------|--------|------------|
|  |  | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl.  | Wages      |
| Waste Management and Remediation Service                  | 562        | *      | *          | 0      | 0          | 0      | 0          | 0      | 0          | 0      | 0          | 0      | 0          | 0      | 0          |
| Educational services                                      | 61         | 344    | 3,427,386  | 349    | 3,367,188  | 342    | 3,313,035  | 392    | 3,275,432  | 392    | 3,272,307  | 364    | 3,198,755  | 359    | 3,087,887  |
| Health care and social assistance                         | 62         | 4,184  | 46,112,177 | 4,333  | 47,078,184 | 4,330  | 48,544,244 | 4,567  | 52,085,482 | 4,426  | 49,968,114 | 4,503  | 53,156,190 | 4,700  | 55,575,846 |
| Ambulatory Health Care Services                           | 621        | 1,084  | 16,939,235 | 1,126  | 17,758,907 | 1,190  | 18,287,258 | 1,311  | 20,017,648 | 1,232  | 19,643,599 | 1,319  | 21,479,204 | 1,399  | 20,958,839 |
| Hospitals   | 622        | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          |
| Nursing and Residential Care Facilities                   | 623        | 780    | 4,985,420  | 794    | 5,097,522  | 773    | 5,537,001  | 793    | 5,597,524  | 708    | 4,623,589  | 709    | 4,992,604  | 711    | 5,375,980  |
| Social Assistance   | 624        | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          |
| Arts, entertainment, and recreation                       | 71         | 1,247  | 8,313,739  | 1,176  | 8,124,674  | 1,135  | 8,422,311  | 1,604  | 11,841,599 | 1,640  | 12,473,133 | 1,568  | 11,909,325 | 1,553  | 11,970,096 |
| Performing Arts, Spectator Sports, and Related Industries | 711        | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          |
| Museums, Historical Sites, and Similar Institution        | 712        | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          |
| Amusement, Gambling, and Recreation Industries            | 713        | 1,151  | 6,900,744  | 1,082  | 6,702,221  | 1,036  | 7,000,493  | 1,528  | 10,478,162 | 1,545  | 11,039,527 | 1,492  | 10,606,761 | 1,486  | 10,849,399 |
| Accommodation and food services                           | 72         | 2,573  | 8,565,597  | 2,425  | 8,229,322  | 2,048  | 7,564,162  | 2,284  | 8,213,649  | 2,069  | 7,678,961  | 2,032  | 7,836,021  | 1,838  | 7,049,431  |
| Accommodation   | 721        | 279    | 1,198,961  | 234    | 1,017,984  | 209    | 876,775    | 276    | 1,112,198  | 243    | 1,047,189  | 278    | 1,158,780  | 152    | 617,013    |

## Dover Employment and Wages by Industry

|  | NAICS code | Dec-07 |            | Dec-08 |            | Dec-09 |             | Dec-10 |             | Dec-11 |             | Dec-12 |             | Dec-13 |             |
|--|------------|--------|------------|--------|------------|--------|-------------|--------|-------------|--------|-------------|--------|-------------|--------|-------------|
|  |            | Empl.  | Wages      | Empl.  | Wages      | Empl.  | Wages       | Empl.  | Wages       | Empl.  | Wages       | Empl.  | Wages       | Empl.  | Wages       |
| Food Services and Drinking Places                                      | 722        | 2,294  | 7,366,636  | 2,191  | 7,211,338  | 1,839  | 6,687,387   | 2,008  | 7,101,451   | 1,826  | 6,631,772   | 1,754  | 6,677,241   | 1,686  | 6,432,418   |
| Other services, except public administration                           | 81         | 858    | 5,158,845  | 825    | 5,187,651  | 700    | 4,023,601   | 735    | 4,328,778   | 695    | 3,912,772   | 852    | 4,571,095   | 808    | 4,439,098   |
| Repair and Maintenance   | 811        | 83     | 382,511    | 86     | 517,901    | 77     | 593,572     | 75     | 562,164     | 78     | 523,967     | 114    | 861,539     | 81     | 655,882     |
| Personal and Laundry Services  | 812        | 436    | 2,839,924  | 405    | 2,788,757  | 318    | 1,800,012   | 332    | 1,860,170   | 296    | 1,558,156   | 370    | 1,846,292   | 368    | 1,885,346   |
| Religious, Grantmaking, Civic, Professional, and Similar Organizations | 813        | 325    | 1,890,872  | 320    | 1,845,662  | 293    | 1,605,175   | 317    | 1,884,157   | 317    | 1,823,824   | 364    | 1,856,808   | 359    | 1,897,870   |
| Private Households   | 814        | 14     | 45,538     | 14     | 35,331     | 12     | 24,842      | 11     | 22,287      | *      | *           | *      | *           | 0      | 0           |
| Federal Government   | Fed        | 1,235  | 17,877,527 | 1,191  | 17,060,593 | 1,424  | 19,967,087  | 1,470  | 21,566,676  | 1,503  | 20,265,911  | 1,404  | 19,083,023  | 1,300  | 17,065,524  |
| State Government   | State      | 5,966  | 61,934,319 | 6,026  | 60,609,878 | 6,039  | 67,885,287  | 6,197  | 70,225,027  | 6,392  | 70,557,354  | 6,282  | 72,941,560  | 6,436  | 74,427,528  |
| Local Government   | Local      | 1,534  | 16,236,112 | 1,564  | 20,046,088 | 1,536  | 18,694,827  | 1,554  | 18,862,388  | 1,578  | 18,582,072  | 1,641  | 20,057,594  | 1,613  | 20,838,383  |
| Total. Government  | Govt       | 8,735  | 96,047,958 | 8,781  | 97,716,559 | 8,999  | 106,547,201 | 9,221  | 110,654,091 | 9,473  | 109,405,337 | 9,327  | 112,082,177 | 9,349  | 112,331,435 |

An asterisk (\*) represents data that cannot be released due to employer confidentiality restrictions.

# City of Newark Employment and Wages

The city of Newark is Delaware's third most populous city. Located in New Castle County, it had an estimated population of 32,500 in 2013. Despite being Delaware's third largest city, there does not exist a detailed industry count of the number of jobs within the city limits. The Quarterly Census of Employment and Wages (QCEW) program collects county and state level data, but QCEW data are not routinely generated at more detailed geographic levels. The Local Area Unemployment Statistics provides Newark data for employment, but this is a residency-based count of employment and counts the number of residents who are employed irrespective of where they work. Here, we use the QCEW data, combined with information on the physical addresses of employers, to extract data specifically for firms located within the city of Newark.

There are approximately 400 business establishments within the Newark city limits. New Castle County, by comparison, has over 17,200 business establishments, and there are approximately 28,500 business establishments statewide. The table on page 39 contains detailed industry employment data for the month of December for the years 2007 to 2013. The wage data are quarterly totals for the 4th quarter of 2007 through 2013. An asterisk (\*) represents data that cannot be released due to employer confidentiality restrictions.

In December 2007, Newark had

15,063 jobs and total wages of \$195 million. The largest Newark industry in terms of employment was State Government, which includes State Government Education, with 5,702 jobs. Nearly four out of every ten jobs in Newark was in State Government Education. Newark's next largest industry was Manufacturing with 2,107 jobs. Retail Trade was the third largest industry with 1,929 jobs, followed by Accommodation and Food Services and Local Government,

with \$20,159. The average quarterly wage for all industries in the city of Newark was \$13,092, which lagged behind New Castle County with \$13,406, but was greater than Delaware as a whole with \$12,032.

Unless otherwise noted, in the remaining employment comparisons are over the year December to December changes and wage data comparisons are the changes in wages in the 4th quarter from the 4th quarter of the prior year. In



with 1,685 and 872 jobs, respectively. In terms of average quarterly wages for the 4th quarter of 2007, workers in the Manufacturing industry earned the most with an average quarterly wage of \$21,646. This was followed by Wholesale Trade with an average quarterly wage of \$20,897. Information ranked third

2008, Newark employment fell by 360 jobs to 14,703, a reduction of 2.4 percent. New Castle employment fell by 2.9 percent in 2008. Newark industry employment fell the most in Manufacturing, which dropped by 187 jobs. Retail Trade and Administrative and Waste Service had the next largest industry

employment declines, falling by 80 and 71 jobs, respectively. For 2008, Wholesale Trade and Finance and Insurance created the most jobs in Newark with 29 and 28 jobs, respectively. Most other industries were relatively flat in terms of employment change. Newark wages increased by nearly \$2.4 million in 2008, which represented a 2.4 percent increase from the previous year. State Government had the largest increase in wages with an increase of \$5.8 million. The next largest industry wage gain was in Wholesale Trade with an increase of \$1 million. Much of the wage gains were offset by wage declines in Manufacturing with \$2.8 million, Retail Trade with \$1.3 million, and Professional and Technical Services with \$1.2 million. The average quarterly wage in Newark increased \$1,442 to \$14,534. Wholesale Trade had the highest average quarterly wage of \$23,426, followed by Manufacturing with \$22,659 and State Government Education with \$16,785.

In 2009, Newark employment fell by 1,587 to 13,116 jobs, a reduction in employment of 10.8 percent. Employment in New Castle County fell by 5.4 percent during the same time period. Over 70 percent of the total job losses in Newark can be attributed to just one industry; Manufacturing. The Manufacturing industry lost 1,155 jobs over the year. Six out of every ten Newark manufacturing jobs were lost in 2009. Retail Trade suffered the second largest decline in jobs losing 182, a decline of 9.8 percent. Wholesale Trade lost

81 jobs. The large decline in total employment was nearly matched in percentage terms by the decline in wages. Newark wages fell by \$19.2 million, a decline of 9.7 percent. The large decline in Manufacturing employment also impacted wages in Manufacturing, which fell more in this industry than any other. Manufacturing wages fell by \$22.4 million, a decline in wages of 59.4 percent over the year. Wholesale Trade had the next largest wage decline, falling \$2.1 million. State Government and Professional and Technical Services had wage gains of \$4.2 million and \$1.2 million, respectively. The average quarterly wage in Newark decreased by \$1,106 to \$13,428. The industry with the highest average quarterly wage was Wholesale Trade with \$21,250, followed by Manufacturing with \$19,923, and State Government Education with \$17,419.

In 2010, Newark had a small increase of 26 jobs (0.2 percent) over the year, following two years of job losses. New Castle County employment did not do much better in percentage terms, increasing by only 0.5 percent over the same time period. Private sector employment was down 290, but public sector employment more than offset this loss with a gain of 316 jobs. Job gains were greatest in State Government with an increase of 299 jobs. Health Care and Social Assistance was next with an increase in 54 jobs, followed closely by Accommodation and Food Services with an increase of 18 jobs. Professional and Technical Services lost 264 jobs. Wages in Newark

increased by \$4 million in 2010. State Government had the largest wage increase over the year, up \$4.7 million. The next largest increase in wages was in Health Care and Social Assistance with \$835,000. Wages in the Professional and Technical Services industry declined by \$2.3 million, a decline of 25 percent, and Manufacturing wages declined by \$381,000. The average quarterly wage in Newark increased by \$474 to \$13,902. Workers in the Professional and Technical Services industry had the highest average quarterly wage with \$23,167, followed by Manufacturing with \$20,363 and Wholesale Trade with \$19,781.

Newark employment declined in 2011, falling by 423 jobs, a decline of 3.2 percent. Private industry jobs were up by 180 jobs; however, these jobs were offset by a decline of 603 public sector jobs. New Castle County by comparison had an increase of jobs of 1.3 percent. State Government had, by far, the greatest loss in industry employment for Newark, down 607 jobs. Professional and Technical Services had the next largest industry decline, losing 38 jobs. Accommodation and Food Services had the greatest increase in jobs, up 145. This increase was followed by an increase in Finance and Insurance, up 79 jobs. Despite the overall employment losses, wages in Newark were up by \$4.1 million. These wage gains were driven mostly by gains in State Government, which were up \$3.2 million. Wages in Finance and Insurance were up by \$1.3 million. Health Care and Social Assistance saw wages decline

by \$748,000 and Retail Trade wages were down \$634,000. The average quarterly wage in Newark increased by \$658 to \$14,560. Professional and Technical Services and Information had the highest average quarterly wages with \$28,189 and \$23,220, respectively.

Newark employment was little changed in 2012, increasing by 3 jobs compared to the previous year. The 98 new private sector jobs were mostly offset by the decline of 95 public sector jobs. Employment in New Castle County increased by 2,926 jobs, or a rate of 1.1 percent. All industries in Newark had little change in employment. Finance and Insurance created the most jobs with 82, and Professional and Technical Services had 68 new jobs. State Government lost 103 jobs, and the Retail Trade industry had the second largest job decline with 95. Although employment was little changed

overall, wages were up by \$6.5 million, an increase of 3.5 percent. Wage increases were led by State Government with \$4.1 million and Professional and Technical Services up \$1.1 million. Accommodation and Food Services had the greatest decline in wages, down \$571,000, followed by Manufacturing, down \$430,000. The average quarterly wage was up again in 2012 by \$467 to \$15,027. The average quarterly wage was highest in 2012 for Information industry workers with \$54,140. Coming in second was Professional and Technical Service workers with \$25,243, followed by State Government Education with an average quarterly wage of \$20,989.

In 2013, employment in Newark increased by 452 jobs, a 3.6 percent increase from the prior year. Private sector jobs were up 242 and public sector jobs increased 210. Jobs in

New Castle County were up 3,704, an increase of 1.4 percent. Newark job gains were greatest in State Government with 204 new jobs, followed by Accommodation and Food Services, up 202. Professional and Technical Services had the largest job losses with 44. Wages for Newark workers were relatively flat in 2013, up by only \$218,000, an increase of 0.1 percent. State Government workers saw the largest increase in wages with \$1.1 million and Professional and Technical Services saw the largest decrease in wages of all industries, down \$2.5 million. The average quarterly wage in Newark declined by \$400 to \$14,627. Information workers had the highest average quarterly wage at \$24,417, followed by Professional and Technical workers with \$20,883, and State Government Education workers with \$20,629.





## Newark Employment and Wages by Industry

|   | NAICS code | Dec-07 |            | Dec-08 |            | Dec-09 |            | Dec-10 |            | Dec-11 |            | Dec-12 |            | Dec-13 |            |
|---|------------|--------|------------|--------|------------|--------|------------|--------|------------|--------|------------|--------|------------|--------|------------|
|   |            | Empl.  | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages |
| Wholesale trade   | 42         | 178    | 3,796,262  | 207    | 4,841,436  | 126    | 2,712,929  | 134    | 2,677,011  | 129    | 2,536,778  | 160    | 3,135,556  | 201    | 3,974,278  |
| Merchant Wholesalers, Durable Goods                         | 423        | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          |
| Merchant Wholesalers, Nondurable Goods                      | 424        | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          |
| Wholesale Electronic Markets and Agents and Brokers         | 425        | 19     | 501,029    | 18     | 460,794    | 17     | 616,906    | 28     | 548,713    | 15     | 473,514    | 17     | 646,976    | 17     | 773,343    |
| Retail trade  | 44-45      | 1,929  | 13,923,576 | 1,849  | 12,665,647 | 1,667  | 12,916,408 | 1,684  | 13,442,890 | 1,691  | 12,809,130 | 1,596  | 12,450,278 | 1,620  | 12,846,474 |
| Motor Vehicle and Parts Dealers                             | 441        | 599    | 7,433,062  | 558    | 6,369,694  | 494    | 6,149,132  | 537    | 6,603,826  | 528    | 6,592,613  | 497    | 6,465,697  | 514    | 6,830,818  |
| Furniture and Home Furnishings Stores                       | 442        | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          |
| Electronics and Appliance Stores                            | 443        | 23     | 102,196    | *      | *          | *      | *          | *      | *          | *      | *          | 28     | 106,226    | 28     | 105,822    |
| Building Material and Garden Equipment and Supplies Dealers | 444        | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          | *      | *          |
| Food and Beverage Stores                                    | 445        | 434    | 2,780,090  | 429    | 2,795,049  | 407    | 2,868,535  | 399    | 3,006,971  | 359    | 2,413,901  | 385    | 2,357,782  | 401    | 2,365,407  |
| Health and Personal Care Stores                             | 446        | 158    | 763,570    | 124    | 576,135    | 107    | 669,975    | 108    | 695,912    | 98     | 693,178    | 95     | 743,381    | 103    | 743,832    |



## Newark Employment and Wages by Industry

|  | NAICS code | Dec-07 |           | Dec-08 |           | Dec-09 |           | Dec-10 |           | Dec-11 |           | Dec-12 |           | Dec-13 |           |
|--|------------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|
|  |  | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl.  | Wages     |
| Support Activities for Transportation  | 491        | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         |
| Couriers and Messengers  | 492        | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | *      | *         |
| Warehousing and Storage  | 493        | 0      | 0         | 0      | 0         | 0      | 0         | *      | *         | *      | *         | 0      | 0         | 0      | 0         |
| Information  | 51         | *      | *         | *      | *         | *      | *         | 14     | 178,666   | 21     | 479,881   | 16     | 884,288   | 17     | 406,944   |
| Publishing Industries  | 511        | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         |
| Motion Picture and Sound Recording Industries                                | 512        | *      | *         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         |
| Broadcasting (except Internet)   | 515        | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         |
| Telecommunications   | 517        | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         |
| Internet Service Providers, Web Search Portals, and Data Processing Services | 518        | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         |
| Other Information Services   | 519        | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         |
| Finance and insurance  | 52         | 164    | 1,459,552 | 192    | 1,903,476 | 150    | 1,952,469 | 120    | 1,865,338 | 199    | 3,207,070 | 281    | 3,351,378 | 270    | 3,223,570 |
| Monetary Authorities - Central Bank  | 521        | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         |
| Credit Intermediation and Related Activities                                 | 522        | 121    | 864,824   | 161    | 1,369,213 | 114    | 1,475,808 | 80     | 1,373,009 | 165    | 2,735,428 | 238    | 2,819,930 | 236    | 2,686,491 |

## Newark Employment and Wages by Industry

|   | NAICS code | Dec-07 |           | Dec-08 |           | Dec-09 |           | Dec-10 |           | Dec-11 |           | Dec-12 |           | Dec-13 |           |
|---|------------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|--------|-----------|
|   |            | Empl.  | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages |
| Securities, Commodity Contracts, and Other Financial Investments and Related Activities | 523        | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         |
| Insurance Carriers and Related Activities   | 524        | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         | *      | *         |
| Funds, Trusts, and Other Financial Vehicles   | 525        | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         |
| Real estate and rental and leasing  | 53         | 132    | 1,277,125 | 116    | 1,299,117 | 92     | 905,535   | 91     | 937,002   | 75     | 763,897   | 81     | 849,190   | 82     | 869,866   |
| Real Estate   | 531        | 65     | 615,100   | 60     | 727,641   | 63     | 651,892   | 68     | 674,265   | *      | *         | *      | *         | *      | *         |
| Rental and Leasing Services   | 532        | 67     | 662,025   | 56     | 571,476   | 29     | 253,643   | 23     | 262,737   | *      | *         | *      | *         | *      | *         |
| Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)                    | 533        | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         | 0      | 0         |
| Professional and technical services   | 54         | 602    | 9,005,870 | 611    | 7,843,906 | 556    | 9,038,372 | 292    | 6,772,499 | 254    | 7,141,317 | 322    | 8,263,037 | 278    | 5,784,588 |
| Management of companies and enterprises   | 55         | 40     | 190,612   | 42     | 250,194   | 42     | 251,357   | 37     | 390,990   | 34     | 210,558   | 41     | 249,818   | 25     | 144,802   |
| Administrative and waste services   | 56         | 215    | 1,246,685 | 144    | 950,368   | 109    | 908,928   | 86     | 803,701   | 114    | 1,068,502 | 116    | 1,016,076 | 125    | 1,155,529 |



## Newark Employment and Wages by Industry

|  | NAICS code | Dec-07 |             | Dec-08 |             | Dec-09 |             | Dec-10 |             | Dec-11 |             | Dec-12 |             | Dec-13 |             |
|--|------------|--------|-------------|--------|-------------|--------|-------------|--------|-------------|--------|-------------|--------|-------------|--------|-------------|
|  |  | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl. | Wages | Empl.  | Wages       |
| Accommodation and food services  | 72         | 1,685  | 7,435,679   | 1,703  | 7,962,784   | 1,724  | 8,143,806   | 1,742  | 8,518,783   | 1,887  | 8,865,612   | 1,829  | 8,294,468   | 2,031  | 8,532,473   |
| Accommodation  | 721        | *      | *           | *      | *           | 136    | 729,781     | 144    | 841,650     | 151    | 891,266     | 152    | 889,983     | 157    | 997,725     |
| Food Services and Drinking Places                                      | 722        | *      | *           | *      | *           | 1,588  | 7,414,025   | 1,598  | 7,677,133   | 1,736  | 7,974,346   | 1,677  | 7,404,485   | 1,874  | 7,534,748   |
| Other services, except public administration                           | 81         | 422    | 4,261,534   | 406    | 4,310,882   | 371    | 4,044,657   | 334    | 3,862,071   | 330    | 3,811,359   | 351    | 4,086,699   | 414    | 4,604,675   |
| Repair and Maintenance   | 811        | *      | *           | *      | *           | *      | *           | *      | *           | *      | *           | *      | *           | *      | *           |
| Personal and Laundry Services  | 812        | 113    | 601,825     | 114    | 582,362     | 106    | 511,029     | 84     | 444,880     | 97     | 489,345     | 85     | 482,365     | 89     | 461,866     |
| Religious, Grantmaking, Civic, Professional, and Similar Organizations | 813        | 285    | 3,470,968   | 271    | 3,586,311   | 242    | 3,357,806   | 225    | 3,271,389   | 227    | 3,193,905   | 251    | 3,479,539   | 255    | 3,798,787   |
| Private Households   | 814        | *      | *           | *      | *           | *      | *           | *      | *           | *      | *           | *      | *           | *      | *           |
| Federal Government   | Fed        | 148    | 2,305,812   | 136    | 2,059,947   | 125    | 1,967,728   | 125    | 2,033,938   | 117    | 1,795,309   | 117    | 1,976,810   | 116    | 1,931,560   |
| State Government   | State      | 5,702  | 91,426,415  | 5,688  | 97,265,481  | 5,727  | 101,512,717 | 6,026  | 106,246,512 | 5,419  | 109,425,075 | 5,316  | 113,559,219 | 5,520  | 114,684,658 |
| Local Government   | Local      | 872    | 9,539,693   | 883    | 10,280,082  | 880    | 10,996,431  | 897    | 11,249,994  | 909    | 11,548,892  | 917    | 12,009,299  | 924    | 12,179,453  |
| Total. Government  | Govt       | 6,722  | 103,271,920 | 6,707  | 109,605,510 | 6,732  | 114,476,876 | 7,048  | 119,530,444 | 6,445  | 122,769,276 | 6,350  | 127,545,328 | 6,560  | 128,795,671 |

An asterisk (\*) represents data that cannot be released due to employer confidentiality restrictions.

# City of Wilmington Employment and Wages

The city of Wilmington is Delaware's most populous city. Located in New Castle County, it had an estimated population of 71,500 in 2013. Here, we use the QCEW data, combined with information on the physical addresses of employers, to extract data specifically for firms located within the city of Wilmington. There are approximately 2,000 business establishments within the Wilmington city limits. New Castle County, by comparison, has over 17,200 business establishments, and there are approximately 28,500 business establishments statewide. The table on page 48 contains detailed industry employment data for the month of December for the years 2012 to 2013. This article updates and extends the 2012 Delaware Annual Economic Report on Employment and Wages for the city of Wilmington. The 2012 data in the table has been updated with revised QCEW data and with this article extends the coverage to 2013. The wage data are quarterly totals for the 4th quarter of 2012 through 2013. An asterisk (\*) represents data that cannot be released due to employer confidentiality restrictions.

In December 2013, the City of Wilmington had 54,553 jobs and total wages of \$952 million in the 4th quarter of 2013. Wilmington's largest industry in terms of employment was Finance and Insurance with 11,958 jobs. One out of every five Wilmington jobs was in Finance and Insurance. Wilmington's next largest industry was Professional and Technical Services with 7,201

jobs, followed by Health Care and Social Assistance with 6,636 jobs, and Administrative and Waste Services with 6,237 jobs. The average quarterly wage in Wilmington for the 4th quarter of 2013 was \$17,515. Workers in New Castle County, by comparison, had an average quarterly wage of \$15,082, and Delaware's average quarterly wage was \$13,457. Professional and Technical Service workers in Wilmington had the highest average quarterly wage of all industries with \$34,748. This was followed by Management of Companies and Enterprises with \$26,973 and Finance and Insurance with \$24,554.

Unless otherwise noted, this section's employment comparisons are over the year December to December changes. Wage data comparisons are the changes in wages in the 4th quarter from the 4th quarter of the prior year. Wilmington employment increased in 2013 by 2,592 jobs, an increase of 5.0 percent. Private industry jobs were up by 2,313 jobs and public sector jobs were up 279. New Castle County, by comparison, had an increase in jobs

of 1.4 percent. Administrative and Waste Services had the greatest increase in industry employment for Wilmington, up by 1,767 jobs, closely followed by an increase in Finance and Insurance, up 1,272 jobs. Management of Companies and Enterprises experienced the largest job losses in 2013, down 277. Professional and Technical Services had the next largest industry losses in 2013, down 121 jobs. Although Wilmington employment increased in 2013, wages were down \$128 million. The decline in wages was driven by Professional and Technical Services, which was down \$144 million. The Professional and Technical Services industry had a one-time spike in wages for 2012, and the fall in wages was a return to a more normal wage level. The next largest industry wage declines were in Management of Companies and Enterprises, down \$17 million, and Health Care and Social Assistance, down \$4.8 million. Wages in Finance and Insurance were up \$23.2 million, and Administrative and Waste Services wages were up \$6.9 million.



## Wilmington Employment and Wages by Industry

|  | NAICS code | Dec-12 |               | Dec-13 |             |
|--|------------|--------|---------------|--------|-------------|
|  |            | Empl.  | Wages         | Empl.  | Wages       |
|  | Total      | 51,961 | 1,080,187,295 | 54,553 | 951,762,191 |
| Agriculture, forestry, fishing and hunting                   | 11         | 0      | 0             | 0      | 0           |
| Mining   | 21         | 0      | 0             | 0      | 0           |
| Utilities  | 22         | *      | *             | *      | *           |
| Construction   | 23         | 1,259  | 19,598,708    | 1,259  | 23,181,077  |
| Construction of Buildings                                    | 236        | 350    | 6,234,607     | 371    | 6,614,700   |
| Heavy and Civil Engineering Construction                     | 237        | 96     | 1,663,096     | 127    | 1,585,249   |
| Specialty Trade Contractors                                  | 238        | 813    | 11,701,005    | 761    | 14,981,128  |
| Manufacturing  | 31-33      | 785    | 12,052,531    | 747    | 12,366,534  |
| Food Manufacturing   | 311        | *      | *             | *      | *           |
| Beverage and Tobacco Product Manufacturing                   | 312        | *      | *             | *      | *           |
| Textile Mills  | 313        | 0      | 0             | 0      | 0           |
| Textile Product Mills  | 314        | *      | *             | *      | *           |
| Apparel Manufacturing  | 315        | 0      | 0             | 0      | 0           |
| Leather and Allied Product Manufacturing                     | 316        | 0      | 0             | 0      | 0           |
| Wood Product Manufacturing                                   | 321        | 0      | 0             | 0      | 0           |
| Paper Manufacturing  | 322        | *      | *             | *      | *           |
| Printing and Related Support Activities                      | 323        | 159    | 1,974,987     | 134    | 2,003,938   |
| Petroleum and Coal Products Manufacturing                    | 324        | *      | *             | *      | *           |
| Chemical Manufacturing                                       | 325        | *      | *             | *      | *           |
| Plastics and Rubber Products Manufacturing                   | 326        | 0      | 0             | 0      | 0           |
| Nonmetallic Mineral Product Manufacturing                    | 327        | *      | *             | *      | *           |
| Primary Metal Manufacturing                                  | 331        | *      | *             | *      | *           |
| Fabricated Metal Product Manufacturing                       | 332        | 159    | 2,147,673     | 138    | 1,925,491   |
| Machinery Manufacturing                                      | 333        | *      | *             | *      | *           |
| Computer and Electronic Product Manufacturing                | 334        | *      | *             | *      | *           |
| Electrical Equipment, Appliance, and Component Manufacturing | 335        | 0      | 0             | 0      | 0           |
| Transportation Equipment Manufacturing                       | 336        | *      | *             | *      | *           |
| Furniture and Related Product Manufacturing                  | 337        | *      | *             | *      | *           |
| Miscellaneous Manufacturing                                  | 339        | *      | *             | *      | *           |
| Wholesale trade  | 42         | 431    | 7,216,524     | 454    | 8,403,743   |
| Merchant Wholesalers, Durable Goods                          | 423        | 209    | 3,125,848     | 259    | 4,286,341   |
| Merchant Wholesalers, Nondurable Goods                       | 424        | 146    | 2,935,622     | 116    | 2,010,682   |
| Wholesale Electronic Markets and Agents and Brokers          | 425        | 76     | 1,155,054     | 79     | 2,106,720   |
| Retail trade   | 44-45      | 1,981  | 18,294,254    | 1,921  | 18,242,089  |
| Motor Vehicle and Parts Dealers                              | 441        | 606    | 7,271,075     | 557    | 7,897,487   |

## Wilmington Employment and Wages by Industry

|   | NAICS code | Dec-12 |             | Dec-13 |             |
|---|------------|--------|-------------|--------|-------------|
|   |            | Empl.  | Wages       | Empl.  | Wages       |
| Furniture and Home Furnishings Stores   | 442        | 177    | 1,696,829   | 179    | 1,840,886   |
| Electronics and Appliance Stores  | 443        | 56     | 1,232,110   | *      | *           |
| Building Material and Garden Equipment and Supplies Dealers                           | 444        | 51     | 560,282     | 47     | 571,514     |
| Food and Beverage Stores  | 445        | 451    | 3,170,968   | 483    | 3,314,403   |
| Health and Personal Care Stores   | 446        | 245    | 2,086,924   | 244    | 1,964,985   |
| Gasoline Stations   | 447        | 55     | 253,644     | 46     | 228,345     |
| Clothing and Clothing Accessories Stores  | 448        | 166    | 652,243     | 154    | 643,738     |
| Sporting Goods, Hobby, Book, and Music Stores   | 451        | 31     | 217,148     | 29     | 224,835     |
| General Merchandise Stores  | 452        | 37     | 160,684     | 38     | 186,534     |
| Miscellaneous Store Retailers   | 453        | 67     | 371,630     | 75     | 426,016     |
| Nonstore Retailers  | 454        | *      | *           | *      | *           |
| Transportation and warehousing  | 48-49      | 791    | 10,513,048  | 704    | 9,239,166   |
| Air Transportation  | 481        | *      | *           |        |             |
| Rail Transportation   | 483        | *      | *           | *      | *           |
| Water Transportation  | 484        | 24     | 452,533     | 22     | 474,263     |
| Truck Transportation  | 485        | 20     | 68,855      | 6      | 37493       |
| Transit and Ground Passenger Transport  | 486        | 0      | 0           | 0      | 0           |
| Pipeline Transportation   | 487        | *      | *           | *      | *           |
| Scenic and Sightseeing Transportation   | 488        | 472    | 6,457,002   | 433    | 6,216,861   |
| Support Activities for Transportation   | 491        | 0      | 0           | 0      | 0           |
| Couriers and Messengers   | 492        | *      | *           | *      | *           |
| Warehousing and Storage   | 493        | 61     | 711,481     | 64     | 641,784     |
| Information   | 51         | 389    | 5,233,590   | 365    | 4,831,062   |
| Publishing Industries   | 511        | *      | *           | *      | *           |
| Motion Picture and Sound Recording Industries   | 512        | 70     | 60,348      | *      | *           |
| Broadcasting (except Internet)  | 515        | *      | *           | 27     | 332,020     |
| Telecommunications  | 517        | 237    | 4,414,665   | 228    | 3,907,964   |
| Internet Service Providers, Web Search Portals, and Data Processing Services          | 518        | 0      | 0           | 0      | 0           |
| Other Information Services  | 519        | *      | *           | *      | *           |
| Finance and insurance   | 52         | 10,686 | 267,115,326 | 11,958 | 290,315,422 |
| Monetary Authorities - Central Bank   | 521        | 0      | 0           | 0      | 0           |
| Credit Intermediation and Related Activities  | 522        | 8,372  | 205,534,418 | 9,566  | 229,910,769 |
| Securities, Commodity Contracts, and Other Financial Investments & Related Activities | 523        | 765    | 29,168,686  | 999    | 30,199,032  |
| Insurance Carriers and Related Activities   | 524        | 1,511  | 31,524,641  | 1,393  | 30,205,621  |
| Funds, Trusts, and Other Financial Vehicles   | 525        | 38     | 887,581     | 0      | 0           |
| Real estate and rental and leasing  | 53         | 679    | 9,376,239   | 719    | 9,617,625   |

## Wilmington Employment and Wages by Industry

|  | NAICS code | Dec-12 |             | Dec-13 |             |
|--|------------|--------|-------------|--------|-------------|
|  |            | Empl.  | Wages       | Empl.  | Wages       |
| Real Estate  | 531        | 430    | 6,405,358   | 458    | 6,581,561   |
| Rental and Leasing Services  | 532        | 249    | 2,970,881   | 261    | 3,036,064   |
| Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)   | 533        | 0      | 0           | 0      | 0           |
| Professional and technical services                                    | 54         | 7,322  | 394,514,552 | 7,201  | 250,522,385 |
| Management of companies and enterprises                                | 55         | 1,819  | 58,504,746  | 1,542  | 41,547,806  |
| Administrative and waste services                                      | 56         | 4,470  | 32,009,928  | 6,237  | 38,907,310  |
| Administrative and Support Services                                    | 561        | 4,342  | 29,834,036  | 6,113  | 36,770,732  |
| Waste Management and Remediation Service                               | 562        | 128    | 2,175,892   | 124    | 2,136,578   |
| Educational services   | 61         | 773    | 6,833,145   | 756    | 6,824,678   |
| Health care and social assistance                                      | 62         | 6,732  | 71,912,913  | 6,636  | 67,147,568  |
| Ambulatory Health Care Services  | 621        | 1,692  | 28,268,178  | 1,676  | 25,770,300  |
| Hospitals  | 622        | *      | *           | *      | *           |
| Nursing and Residential Care Facilities                                | 623        | *      | *           | *      | *           |
| Social Assistance  | 624        | 2,030  | 11,646,978  | 2,024  | 12,101,368  |
| Arts, entertainment, and recreation                                    | 71         | 466    | 4,762,229   | 423    | 4,320,113   |
| Performing Arts, Spectator Sports, and Related Industries              | 711        | 230    | 2,797,617   | 184    | 2,235,612   |
| Museums, Historical Sites, and Similar Institution                     | 712        | *      | *           | 90     | 771,820     |
| Amusement, Gambling, and Recreation Industries                         | 713        | 164    | 1,399,942   | 149    | 1,312,681   |
| Accommodation and food services  | 72         | 2,524  | 12,783,133  | 2,473  | 12,841,791  |
| Accommodation  | 721        | 428    | 3,247,317   | 398    | 3,218,971   |
| Food Services and Drinking Places                                      | 722        | 2,096  | 9,535,816   | 2,075  | 9,622,820   |
| Other services, except public administration                           | 81         | 1,558  | 12,932,407  | 1,552  | 13,445,932  |
| Repair and Maintenance   | 811        | 200    | 3,124,790   | 204    | 3,174,550   |
| Personal and Laundry Services  | 812        | 509    | 3,530,921   | 501    | 3,365,932   |
| Religious, Grantmaking, Civic, Professional, and Similar Organizations | 813        | 828    | 6,119,000   | 825    | 6,735,551   |
| Private Households   | 814        | 21     | 157,696     | 22     | 169,899     |
| Federal Government   | Fed        | 895    | 14,559,359  | 1,021  | 16,449,855  |
| State Government   | State      | 4,800  | 60,077,628  | 4,971  | 61,866,344  |
| Local Government   | Local      | 2,931  | 45,901,155  | 2,913  | 44,297,791  |
| Total Government   | Govt       | 8,626  | 120,538,142 | 8,905  | 122,613,990 |

An asterisk (\*) represents data that cannot be released due to employer confidentiality restrictions.

# Business Employment Dynamics

Business Employment Dynamics (BED) measures the gross job gains and gross job losses on a quarterly basis. Gross job gains are increases in employment from expanding and opening establishments and gross job losses are decreases in employment from contracting and closing establishments. The net change in employment is the difference in between the amount of gross job gains and gross job losses. Each quarter the net change in jobs are typically dwarfed by the gross job gains and losses.

During economic expansions and contractions there are always gross job gains. However, during a recession gross job losses typically outweigh the gross job gains, and during the economic boom, gross job gains typically outweigh the gross job losses. For example, from the 4th quarter of 2007 to the 2nd quarter of 2009, the nation was in recession.

Delaware had gross job gains during this period, but these gross job gains were outweighed by even larger gross job losses during most of the recession. This pattern was repeated during the previous recession in 2001 with gross job losses exceeding gross job gains throughout most of the recession. The opposite pattern could be seen during economic expansions where in most quarters gross job gains exceeded gross job losses.

BED also measures the number of establishments with gross job gains at either expanding or opening establishments and the number of establishments with gross job losses at either contracting or closing establishments. An establishment is defined as an economic unit that produces goods or services, while a firm or company may consist of one establishment or multiple establishments at several locations.

The number of establishments with gross job gains either from expanding or opening establishments typically exceeds the number of establishments with gross job losses from either contracting or closing establishments during an economic expansion. On the other hand, the opposite is generally true during a recession as the number of establishments with gross job losses is outweighed by the number of establishments with gross job gains.

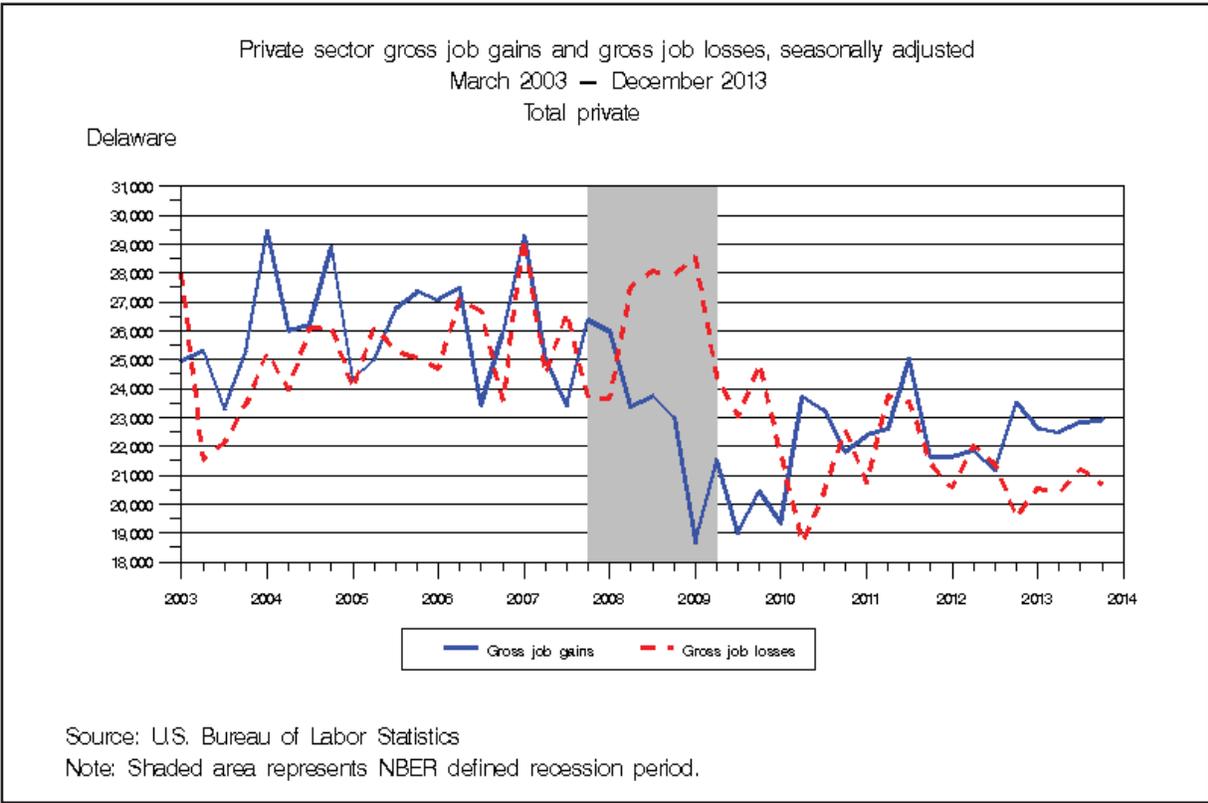
BED data is derived from the Quarterly Census of Employment and Wages (QCEW) program, linking administrative Unemployment Insurance (UI) establishment data across time. The employment changes in the BED are measured from the 3rd month of each quarter. All the data referenced in this article are seasonally adjusted.

## Delaware Business Employment Dynamics – 4th Quarter, 2013

From September 2013 to December 2013, Delaware's gross job gains from opening and expanding establishments was 22,951, and the number of job losses from closing and contracting establishments

was 20,704, seasonally adjusted, according to data released by the Delaware Department of Labor and the U.S. Department of Labor's Bureau of Labor Statistics. Expanding and contracting

establishments accounted for most of the jobs gained and lost. The net job change, i.e., the difference between total gross job gains and total gross job losses, was 2,247.

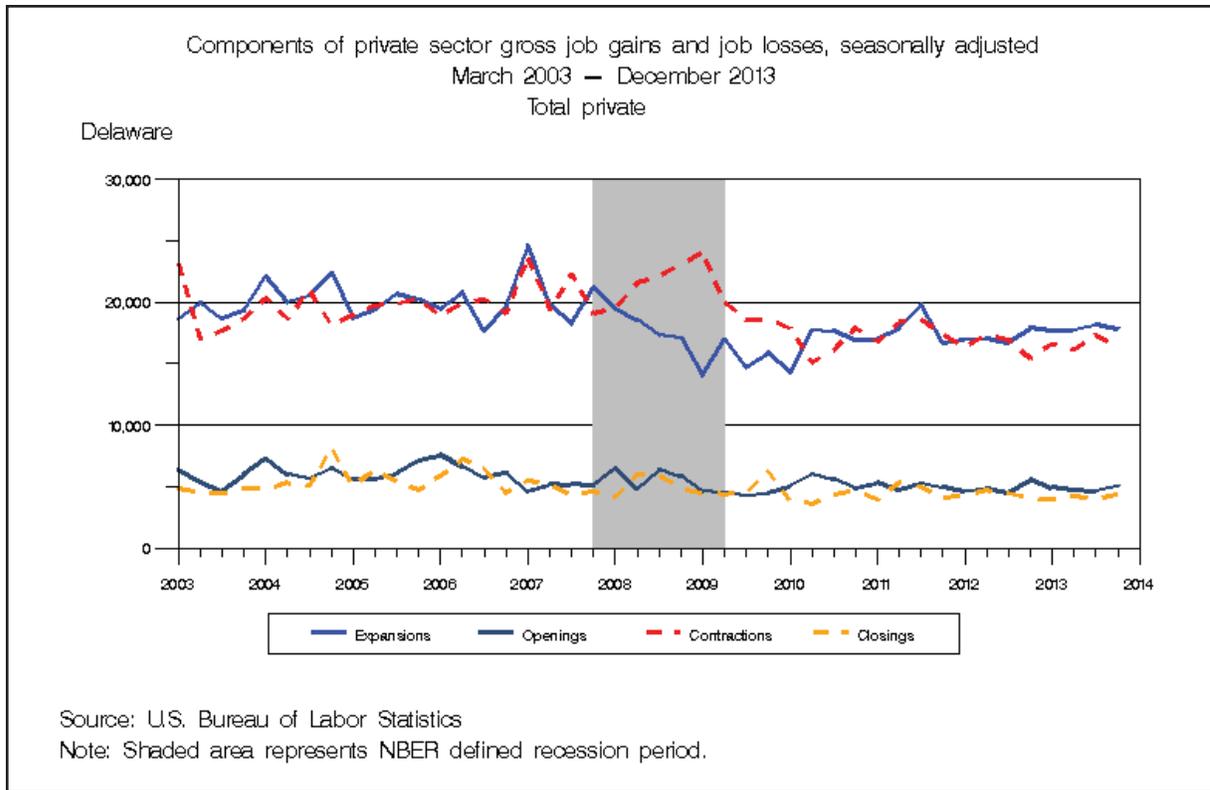


### Trends in Gross Job Gains and Job Losses

Gross job gains comprising of opening and expanding private sector business establishments in Delaware posted 107 greater gross job gains in the fourth quarter than

in the third quarter of 2013. Over the quarter, expanding establishments added 17,900 jobs, while opening establishments added 5,051. Gross job gains were smaller than in

the previous quarter at expanding establishments (-282), but were greater than the previous quarter at opening establishments (+389).



Gross job losses totaled 20,704 in the fourth quarter of 2013, down by 516 from the third quarter, 2013. In the fourth quarter of 2013, contracting

establishments lost 16,290 jobs, while closing establishments accounted for a loss of 4,414 jobs. Gross job losses were smaller than in

the previous quarter at contracting establishments (-1,031), but larger than the previous quarter at closing establishments (+515).

**Table A. Delaware 3-month private sector gross job gains and losses, seasonally adjusted**

| Category                            | 3 months ended |           |           |            |           |
|-------------------------------------|----------------|-----------|-----------|------------|-----------|
|                                     | Dec. 2012      | Mar. 2013 | Jun. 2013 | Sept. 2013 | Dec. 2013 |
|                                     | Levels         |           |           |            |           |
| Gross job gains .....               | 23,491         | 22,621    | 22,484    | 22,844     | 22,951    |
| At expanding establishments .....   | 17,915         | 17,698    | 17,746    | 18,182     | 17,900    |
| At opening establishments .....     | 5,576          | 4,923     | 4,738     | 4,662      | 5,051     |
| Gross job losses .....              | 19,541         | 20,532    | 20,386    | 21,220     | 20,704    |
| At contracting establishments ..... | 15,457         | 16,616    | 16,136    | 17,321     | 16,290    |
| At closing establishments .....     | 4,084          | 3,916     | 4,250     | 3,899      | 4,414     |
| Net employment change* .....        | 3,950          | 2,089     | 2,098     | 1,624      | 2,247     |

\* The net employment change is the difference between total gross job gains and total gross job losses

## Rates of Gross Job Gains and Gross Job Losses

From September 2013 to December 2013, Delaware's gross job gains represented 6.4 percent of private sector employment. This was equal to the national rate of gross job gains. Over the quarter, Delaware's gross job gains at expanding establishments represented 5.0 percent of private sector employment, and gross job gains at opening establishments represented 1.4 percent. Nationally this quarter, gross job gains

at expanding establishments represented 5.2 percent of private sector employment, and at opening establishments represented 1.2 percent.

From September 2013 to December 2013, Delaware's gross job losses represented 5.8 percent of private sector employment. This was the same as the national rate of gross job losses. Delaware's gross job losses at contracting establishments

represented 4.6 percent of private sector employment, which was lower than the national rate at contracting establishments of 4.7 percent. The rate of gross job losses at closing establishments was 1.2 percent for Delaware, while the nation had 1.1 percent gross job losses at closing establishments. The rates of gross job gains and losses provide a picture of the amount of "job churning" that occurs in the labor market.

**Table B. Delaware and U.S. 3-month private sector gross job gains and losses as a percent of employment, seasonally adjusted**

| Category                                   | 3 months ended |           |           |           |           |
|--|----------------|-----------|-----------|-----------|-----------|
|  | Dec. 2012      | Mar. 2013 | Jun. 2013 | Sep. 2013 | Dec. 2013 |
| <b>Total Private for State of Delaware</b> |                |           |           |           |           |
| Rates (percent)                            |                |           |           |           |           |
| Gross job gains .....                      | 6.8            | 6.5       | 6.5       | 6.5       | 6.4       |
| At expanding establishments .....          | 5.2            | 5.1       | 5.1       | 5.2       | 5.0       |
| At opening establishments .....            | 1.6            | 1.4       | 1.4       | 1.3       | 1.4       |
| Gross job losses .....                     | 5.7            | 5.9       | 5.8       | 6.0       | 5.8       |
| At contracting establishments .....        | 4.5            | 4.8       | 4.6       | 4.9       | 4.6       |
| At closing establishments .....            | 1.2            | 1.1       | 1.2       | 1.1       | 1.2       |
| Net employment change* .....               | 1.1            | 0.6       | 0.7       | 0.5       | 0.6       |
| <b>Total Private for U.S. as a whole</b>   |                |           |           |           |           |
| Rates (percent)                            |                |           |           |           |           |
| Gross job gains .....                      | 6.4            | 6.4       | 6.4       | 6.1       | 6.4       |
| At expanding establishments .....          | 5.2            | 5         | 5.2       | 5         | 5.2       |
| At opening establishments .....            | 1.2            | 1.4       | 1.2       | 1.1       | 1.2       |
| Gross job losses .....                     | 5.8            | 5.6       | 5.8       | 5.8       | 5.8       |
| At contracting establishments .....        | 4.7            | 4.6       | 4.7       | 4.8       | 4.7       |
| At closing establishments .....            | 1.1            | 1         | 1.1       | 1         | 1.1       |
| Net employment change* .....               | 0.6            | 0.8       | 0.6       | 0.3       | 0.6       |

\* The net employment change is the difference between total gross job gains and total gross job losses

## Number of Establishments Gaining and Losing Employment

Another way to observe the dynamics of employment change is to count the number of establishments that opened, closed, expanded, or contracted during the quarter. Out of 27,929 active private sector establishments, a total of 5,913 establishments gained jobs

from September 2013 to December 2013. (See Table C.) Of these, 4,582 were expanding establishments and 1,331 were opening establishments. During the fourth quarter of 2013, 5,691 establishments lost jobs. Of these, 4,391 were contracting establishments and 1,300 were

closing establishments. The statistics from Tables A and C indicate that the average expanding establishment added 3.9 jobs during the quarter and the average contracting establishment lost 3.7 jobs during the quarter.

**Table C. Delaware's number of private sector establishments by direction of employment change, seasonally adjusted**

| Category                         | 3 months ended |           |           |           |           |
|----------------------------------|----------------|-----------|-----------|-----------|-----------|
|                                  | Dec. 2012      | Mar. 2013 | Jun. 2013 | Sep. 2013 | Dec. 2013 |
| Establishments gaining jobs..... | 5,876          | 6,031     | 5,716     | 5,726     | 5,913     |
| Expanding establishments.....    | 4,485          | 4,496     | 4,449     | 4,442     | 4,582     |
| Opening establishments.....      | 1,391          | 1,535     | 1,267     | 1,284     | 1,331     |
| Establishments losing jobs.....  | 5,459          | 5,707     | 5,760     | 5,717     | 5,691     |
| Contracting establishments.....  | 4,248          | 4,447     | 4,447     | 4,506     | 4,391     |
| Closing establishments.....      | 1,211          | 1,260     | 1,313     | 1,211     | 1,300     |
| Net establishment change* .....  | 180            | 275       | -46       | 73        | 31        |

\* The net establishment change is the difference between the number of opening establishments and the number of closing establishments.



# Current Employment Statistics: Over-the-year Job Growth

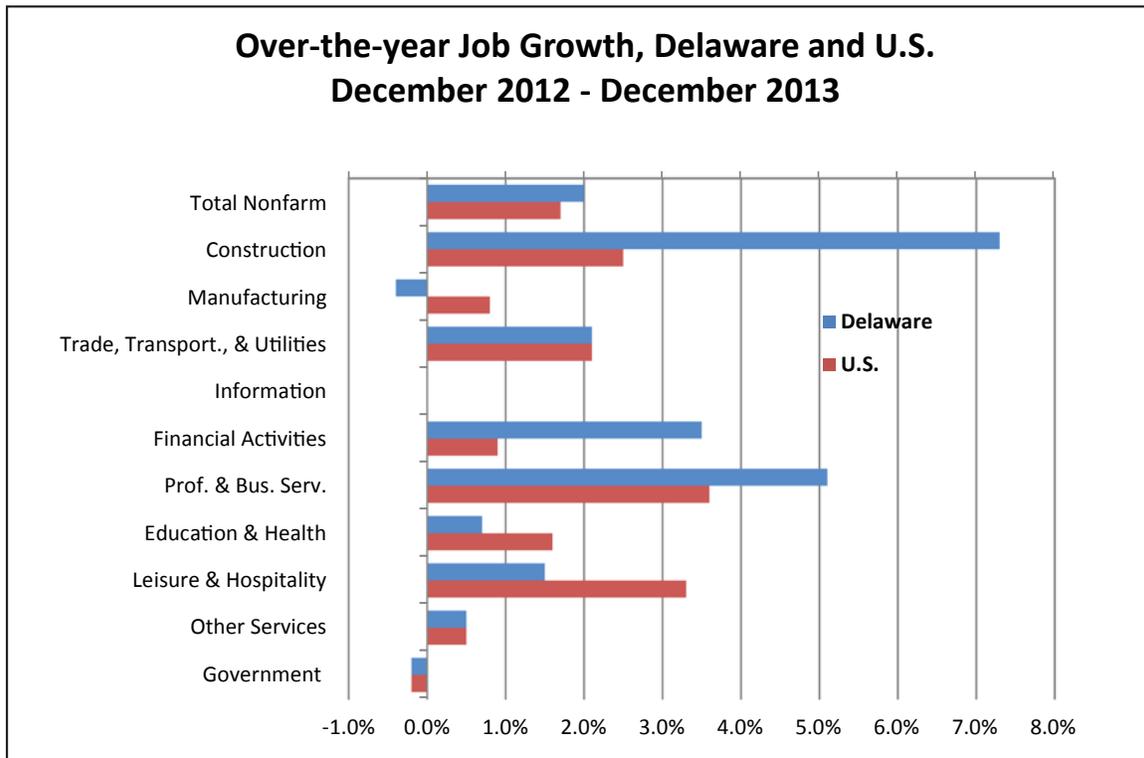
The Current Employment Statistics (CES) program is a Federal/State cooperative program that surveys employers to produce monthly estimates for employment, hours, and earnings for the Nation, States and areas. The CES employer survey allows for timely production of monthly estimates for the current production month and the revised previous month. Each year the CES estimates are revised once again, in a process known as benchmarking, to a nearly complete count of employer payroll data. The Quarterly Census

of Employment and Wages is the main source of the benchmark data. This article examines over-the-year job growth for Delaware industries using CES data. Note that the CES data below have not been benchmarked and are subject to further revision.

Delaware's over-the-year percent change in total nonfarm job growth (2.0%) outpaced U.S. job growth (1.7%) for the 12 months ending December 2013. Gains in the Construction industry

were particularly strong in Delaware growing by 7.3 percent; outperforming the U.S. by 4.8 percentage points.

Professional and Business Services also had strong gains in job growth in Delaware, up 5.1 percent compared with the U.S. at 3.6 percent. The strong growth in the Professional and Business Services industry was driven in part by the high demand for jobs in Employment Services, which located within the Professional and Business Services industry.



Financial Activities had above average growth in jobs growing by 3.5 percent. Of particular note within the Financial Activities industry is Securities, Commodity Contracts, and Other Financial Investments,

which was up 15.7 percent over the year. Nationally, Financial Activities fared less well, growing slower than the U.S. average for all industries, at 0.9 percent. Trade, Transportation, and Utilities also had above average

growth in jobs, at 2.1 percent, in both Delaware and the U.S.

Manufacturing jobs in Delaware were down the most of all Delaware industries losing 0.4 percent. Jobs

in Durable Goods Manufacturing were down 1.1 percent, while Non-Durable Goods Manufacturing jobs in Delaware were flat with no change over the year. Within the Durable Goods industry, Transportation

Equipment Manufacturing was down 10 percent. The U.S., on the other hand, increased Manufacturing jobs by 0.8 percent over-the-year.

Government jobs were down 0.2 percent in both Delaware and the U.S. For Delaware, State Government jobs were down 1.2 percent, while Local Government jobs were up 1.1 percent.

## Comparative Job Growth

For the 12 months ending December 2013, Delaware's 2.0 percent job growth ranked 10th highest of all 50 states. Nevada was ranked 1st in job growth at 3.7 percent and New Mexico was ranked 50th in job growth with

0.4 percent in over-the-year job losses. Of interest is how Delaware's neighboring states (Maryland, Pennsylvania, and New Jersey) fared in terms of job growth. None of Delaware's neighbors ranked above Delaware in terms of over-the-year

job growth. Maryland's 0.5 percent job growth ranked it tied for 38th (with Vermont). Pennsylvania and New Jersey's job growth of 0.3 percent had them both tied 42nd.

| State         | Job Growth for the 12 Months Ending December 2013 | Rank* (out of 50) |
|---------------|---|-------------------|
| Nevada        | 3.7   | 1                 |
| North Dakota  | 3.4   | 2                 |
| Colorado      | 2.7   | 3                 |
| Florida       | 2.7   | 3                 |
| Oregon        | 2.6   | 5                 |
| ...           | ...   | ...               |
| Delaware      | 2.0   | 10                |
| Maryland      | 0.5   | 38                |
| New Jersey    | 0.3   | 42                |
| Pennsylvania  | 0.3   | 42                |
| ...           | ...   | ...               |
| South Dakota  | 0.2   | 44                |
| Virginia      | -0.1  | 47                |
| Alaska        | -0.2  | 48                |
| West Virginia | -0.2  | 48                |
| New Mexico    | -0.4  | 50                |

# Personal Income

Personal income data are produced by the Bureau of Economic Analysis; they are a broad measure of the economic activity of an area. The most recent state level personal income data available are for 2012. All of the nominal dollar values for prior years have been deflated

by the Bureau of Labor Statistics' Philadelphia-Wilmington-Atlantic City Consumer Price Index for All Urban Consumers and converted to constant 2012 dollars.

Personal income is the total amount of compensation that an individual

receives. It is income from having a job or owning a business, investment income, and income from transfer payments, such as Social Security and Medicare. Per capita personal income is the total personal income of an area divided by the total resident population of that area.

## Delaware Real Per Capita Income in Constant 2012 Dollars

|                              | 2007     | 2008     | 2009     | 2010     | 2011     | 2012     |
|------------------------------|----------|----------|----------|----------|----------|----------|
| Per Capita Personal Income   | \$45,072 | \$44,075 | \$43,550 | \$42,945 | \$43,590 | \$44,224 |
| Per Capita Earned Income     | \$29,648 | \$28,524 | \$28,051 | \$27,559 | \$27,729 | \$27,991 |
| Per Capita Investment Income | \$8,750  | \$8,466  | \$7,566  | \$7,151  | \$7,497  | \$7,722  |
| Per Capita Transfer Payments | \$6,674  | \$7,086  | \$7,933  | \$8,234  | \$8,364  | \$8,511  |

**Source:** Bureau of Economic Analysis. Nominal income deflated using the Philadelphia-Wilmington-Atlantic City CPI-U from the Bureau of Labor Statistics.

In 2012, Delaware's per capita personal income was \$44,224. The peak year for real per capita income was in 2006 at \$45,296. Real per capita income fell 2.2 percent in 2008, 1.2 percent in 2009, and 1.4 percent in 2010, only to recover in 2011 and 2012 by rising 1.5 percent each year. From 2007 to 2012, real per capita personal income in Delaware was down 1.9 percent.

The largest share of personal income comes from earned income. Earned income is wages that come from a job or proprietors' income that come from owning a business. In 2012, 63.3 percent of all Delaware personal income was from earned income, which was well below the peak share of 77.4 percent in 1973. Per capita earned income

in Delaware was \$27,991 in 2012. Adjusting for inflation, real per capita earned income was up 0.6 percent in 2011 after several years of decline, especially in 2008, when it was down 3.8 percent. It rose again in 2012, increasing by 0.9 percent. From 2007 to 2012, Delaware's real per capita earned income was down 5.6 percent.

Investment income is income received from dividends, interest, and rent. As a percentage of Delaware personal income, investment income's share in 2012 was 17.5 percent. In 2012, per capita investment income was \$7,722 in Delaware. Real per capita investment income declined steeply during the recession, down 3.2 percent in 2008 and 10.6 percent in

2009. Also, just after the recession in 2010, it was down 5.5 percent. Reductions in dividend income due to stock market declines and a low interest rate environment caused investment income to decline from 2008 to 2010. In 2011 and 2012, real per capita interest income had recovered mostly due to increases in dividend income; it increased by 4.8 percent in 2011, and by 3 percent in 2012. From 2007 to 2012, real per capita investment income was down 11.7 percent.

The fastest growing portion of Delaware's personal income comes from transfer payments. Transfer payments are income that persons receive for which no current service is performed. Social Security, Medicare and Medicaid,

income support programs, and unemployment insurance are all examples of government programs that provide transfer payments. Transfer payments as a share of personal income peaked in 2012 at 19.2 percent. Per capita transfer payments were \$8,511 in

2012. They exceeded per capita investment income for the first time in 2009. Real per capita transfer payments were up 12.0 percent in 2009, helped in part because of increased unemployment insurance compensation payments due to rising unemployment, and gains in

payments from retirement programs. Real per capita transfer payments were up 1.6 percent in 2011 and 1.8 percent in 2012. From 2007 to 2012, real per capita transfer payments were up 27.5 percent.

### Delaware Real Per Capita Income, Percent Change from Previous Year

|                              | 2007  | 2008  | 2009   | 2010  | 2011 | 2012 |
|------------------------------|-------|-------|--------|-------|------|------|
| Per Capita Personal Income   | -0.5% | -2.2% | -1.2%  | -1.4% | 1.5% | 1.5% |
| Per Capita Earned Income     | -2.3% | -3.8% | -1.7%  | -1.8% | 0.6% | 0.9% |
| Per Capita Investment Income | 2.3%  | -3.2% | -10.6% | -5.5% | 4.8% | 3.0% |
| Per Capita Transfer Payments | 4.6%  | 6.2%  | 12.0%  | 3.8%  | 1.6% | 1.8% |

**Source:** Bureau of Economic Analysis. Bureau of Labor Statistics.



# Delaware Migration Flows

The U.S. Census Bureau's American Community Survey (ACS) provides information on state-to-state migration flows. The most current data available are from the 2012 ACS's one year estimates. The ACS

state-to-state migration flows show from which states new Delaware residents are coming (inflow migration) and to which states Delawareans are moving (outflow migration). Domestic migration

is an important component of population change for states. The ACS data give us the ability to calculate which states have the highest net migration to and from Delaware.

## Inflow Migration

Delaware inflow migration data from the ACS are displayed in Table 1. Table 1 lists the top ten states with migration inflow to Delaware, and total U.S. migration inflow to Delaware in terms of the number of people. Pennsylvania ranked first in the number of people moving to Delaware, with 6,828 people

migrating in 2012. This was followed by Delaware's other two neighbors, New Jersey and Maryland, with 5,846 and 5,649 inflow migration, respectively. Delaware's neighboring states of Pennsylvania, New Jersey, and Maryland were the top three states as the source of inflow migration, making up 53 percent

of all people moving to Delaware from other states. Residents from as far away as California and Alaska were in the top ten states with inflow migration. In total, 34,757 individuals moved to Delaware from another state or the District of Columbia.

**Table 1: State Migration to Delaware, 2012**

| Rank         | State                   | Inflow to Delaware |
|--------------|-------------------------|--------------------|
| 1            | Pennsylvania            | 6,828              |
| 2            | New Jersey              | 5,846              |
| 3            | Maryland                | 5,649              |
| 4            | New York                | 3,566              |
| 5            | California              | 2,221              |
| 6            | Virginia                | 1,746              |
| 7            | Connecticut             | 1,489              |
| 8            | North Carolina          | 1,349              |
| 9            | Florida                 | 715                |
| 10           | Alaska                  | 692                |
| <b>Total</b> | <b>U.S.<sup>1</sup></b> | <b>34,757</b>      |

<sup>1</sup> Includes all fifty states plus the District of Columbia.

Source: U.S. Census, American Community Survey 1-year estimate.

## Outflow Migration

The top ten states to where Delawareans have moved in 2012 are given in the Delaware outflow migration data in Table 2. Table 2 provides ACS data on outflow migration from Delaware to another state and the total outflow migration from Delaware to the U.S. in 2012. The states listed in the second column of Table 2 were the

top ten destination states to where Delawareans moved as reported in the ACS. Pennsylvania, which ranked number one for inflow migration to Delaware, also ranked first as the top destination state for outflow migration from Delaware, with 4,814 Delawareans moving to Pennsylvania. Maryland ranked second as the destination state for

outflow migration for Delaware residents at 4,100. Virginia, which ranked 6th as an inflow state to Delaware, ranked 3rd as an outflow state for Delawareans at 2,279. In total, 25,149 Delaware residents moved to another state or the District of Columbia in 2012.

**Table 2: Delaware Migration to Destination State, 2012**

| Rank         | State                   | Outflow from Delaware |
|--------------|-------------------------|-----------------------|
| 1            | Pennsylvania            | 4,814                 |
| 2            | Maryland                | 4,100                 |
| 3            | Virginia                | 2,279                 |
| 4            | North Carolina          | 2,180                 |
| 5            | New Jersey              | 1,921                 |
| 6            | Florida                 | 1,099                 |
| 7            | Ohio                    | 1,079                 |
| 8            | Kentucky                | 706                   |
| 9            | South Carolina          | 697                   |
| 10           | West Virginia           | 674                   |
| <b>Total</b> | <b>U.S.<sup>1</sup></b> | <b>25,149</b>         |

<sup>1</sup> Includes all fifty states plus the District of Columbia.

Source: U.S. Census, American Community Survey 1-year estimate.

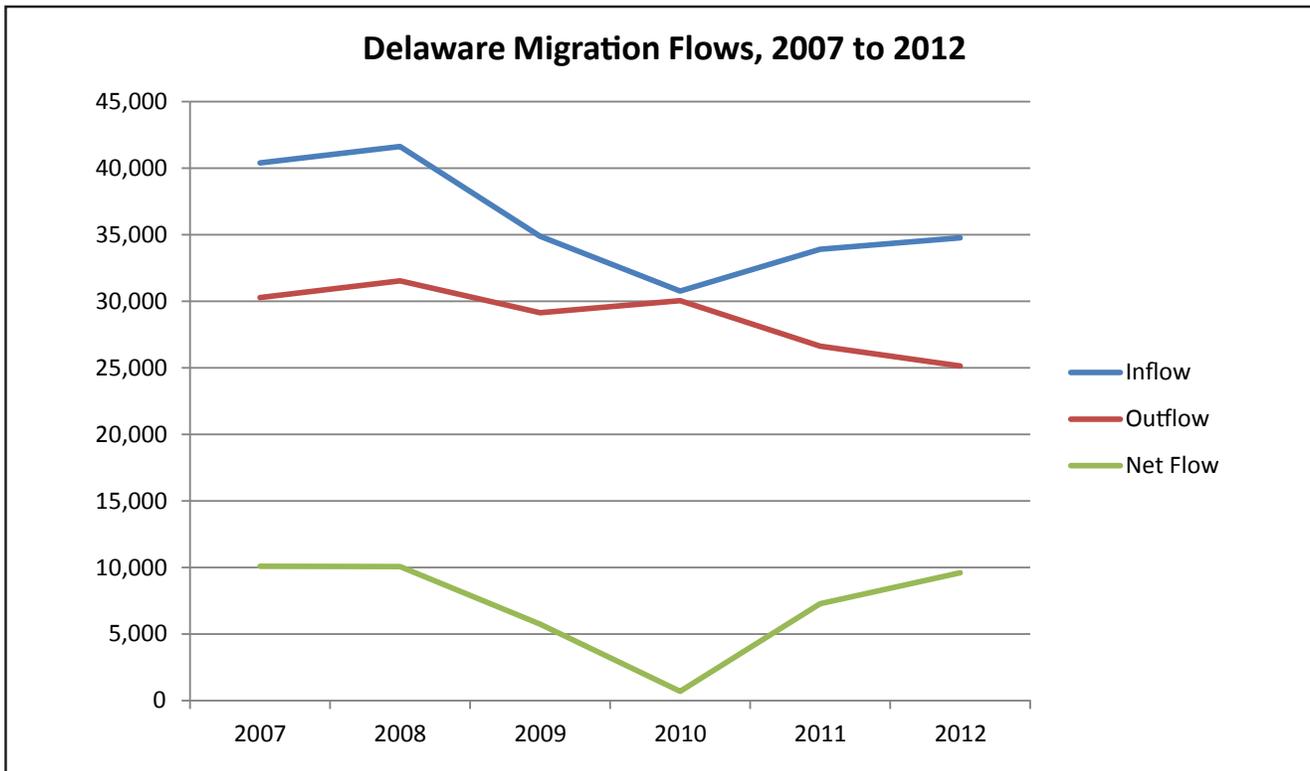
## Total Net Migration

Figure 1 shows the total U.S. migration to and from Delaware. Subtracting the total inflow migration from the total outflow migration gives the net migration flow. Between 2007 and 2012, Delaware inflow migration and outflow migration peaked in 2008. In addition, net migration to Delaware also peaked in 2008

at 10,085 people. By 2010, inflow migration had dropped by over 10,800 while outflow migration declined by less than 1,500 people. This reduction in inflow migration to Delaware from other states caused the net migration flow to Delaware to fall to only 704 people in 2010. Over the next two years, the amount of people leaving

Delaware to move to another state fell by 4,900, and those moving to Delaware increased by nearly 4,000. Because of the increase in inflow migration to Delaware and the decrease in outflow migration from Delaware, Delaware's net migration from the rest of the U.S. increased to 9,608 in 2012.

**Figure 1: Delaware Migration Inflow, Outflow, and Net Migration Flow with U.S.<sup>1</sup>**



<sup>1</sup> Includes all fifty states plus the District of Columbia.

Source: U.S. Census, American Community Survey 1-year estimate and author's calculations

### Net Migration by State

Net migration flows with particular states are given in Tables 3 and 4. Table 3 shows the top five states with net migration to Delaware. Table 4 shows the top five destinations states with

net migration from Delaware. Delaware's neighboring states of New Jersey, Pennsylvania, and Maryland were in the top 5 of net migration to Delaware. Ohio ranks first as the top U.S. state with net

migration from Delaware in 2012. North Carolina and Kentucky ranked 2nd and 3rd, respectively, with net migration from Delaware.

**Table 3: Net Migration to Delaware in 2012**

| Rank | State        | Net Inflow to Delaware |
|------|--------------|------------------------|
| 1    | New Jersey   | 3,925                  |
| 2    | New York     | 3,089                  |
| 3    | Pennsylvania | 2,014                  |
| 4    | California   | 1,747                  |
| 5    | Maryland     | 1,549                  |

Source: U.S. Census, American Community Survey 1-year estimate and author's calculations.

**Table 4: Net Migration from Delaware in 2012**

| Rank | State          | Net Outflow from Delaware |
|------|----------------|---------------------------|
| 1    | Ohio           | -888                      |
| 2    | North Carolina | -831                      |
| 3    | Kentucky       | -706                      |
| 4    | Indiana        | -577                      |
| 5    | Virginia       | -533                      |

Source: U.S. Census, American Community Survey 1-year estimate and author's calculations.

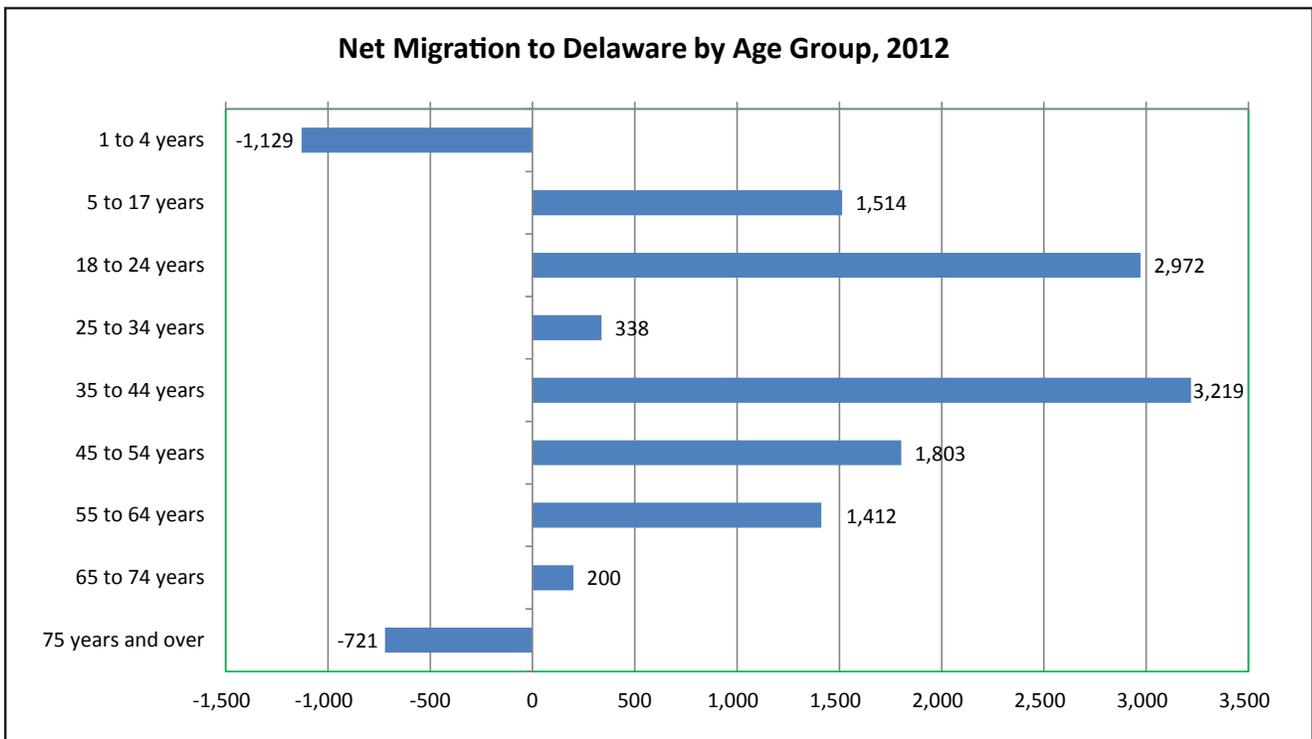
### Net Migration by Age Group

In 2012, there was a net inflow to Delaware of 9,608 people. Figure 2 shows the net migration to Delaware by age group for 2012. There was positive net migration to Delaware for every age group except for children, aged 1 to 4 years old, and

the elderly, 75 years of age and older. Individuals between the age of 25 and 54 are considered to be in their prime working years and are the group mostly likely to be in the labor force. Delaware had a net migration inflow of 5,460 people in their

prime working years. Along with housing and family-related reasons, jobs are one of the main reasons why individuals move to another residence.

**Figure 2: Net Migration to Delaware by Age Group, 2012**



Source: U.S. Census, American Community Survey 1-year estimate and author's calculations.

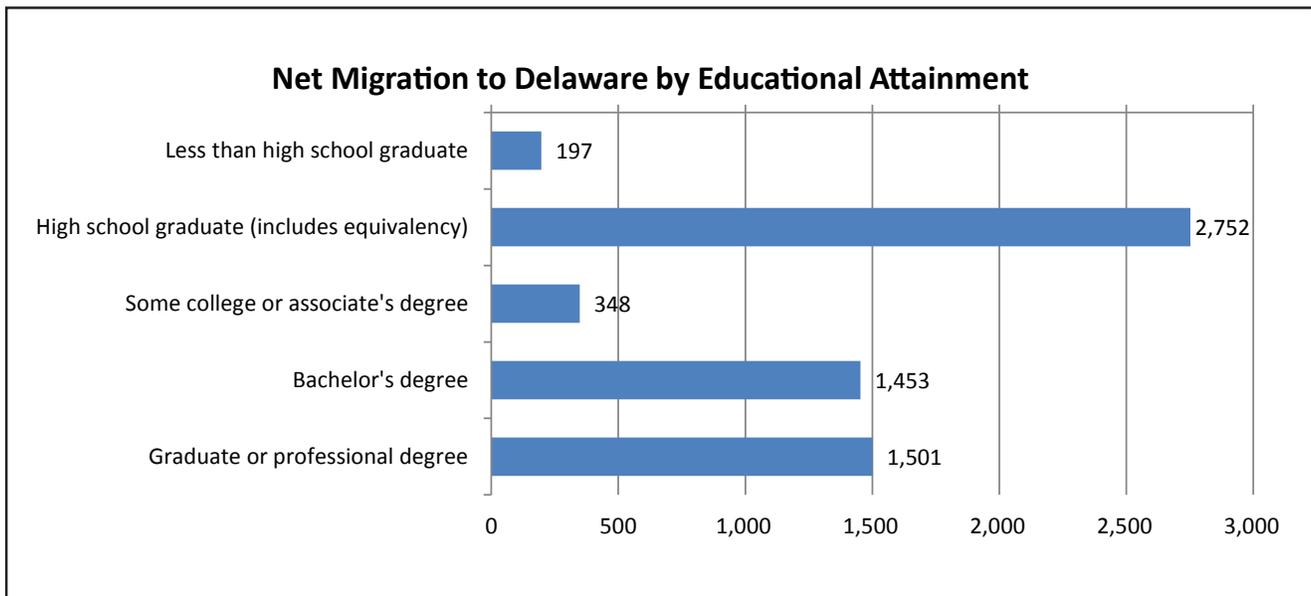
## Net Migration by Educational Attainment

The ACS provides migration data by educational attainment for individuals 25 years old and older. Figure 3 shows that in 2012 there was positive net migration to Delaware for every educational

attainment level for individuals 25 years or older. The net migration flow to Delaware was greatest for those with a high school diploma, representing 44 percent of the total net inflow. Those with a graduate

or professional degree represented 24 percent of the total net inflow, followed by those with a bachelor's degree with 23 percent of the total.

**Figure 3: Net Migration to Delaware by Educational Attainment for Individuals 25 years and older, 2012**



Source: U.S. Census, American Community Survey 1-year estimate and author's calculations.

# Current Population Survey Demographic Data

The Current Population Survey (CPS), a monthly survey of approximately 60,000 households across the US, is the source of the national unemployment rate, as well as a great deal of more detailed economic data. In Delaware, about

900 households are in the survey each month. This is too few to generate the state's unemployment rate directly, so the CPS is used as the key component in an econometric model, as in all states. More detailed data, such as the

demographic labor force graphs shown below, come directly from the survey. By using annual averages, much of the statistical variation in the data, which would be more evident monthly, is smoothed away.

