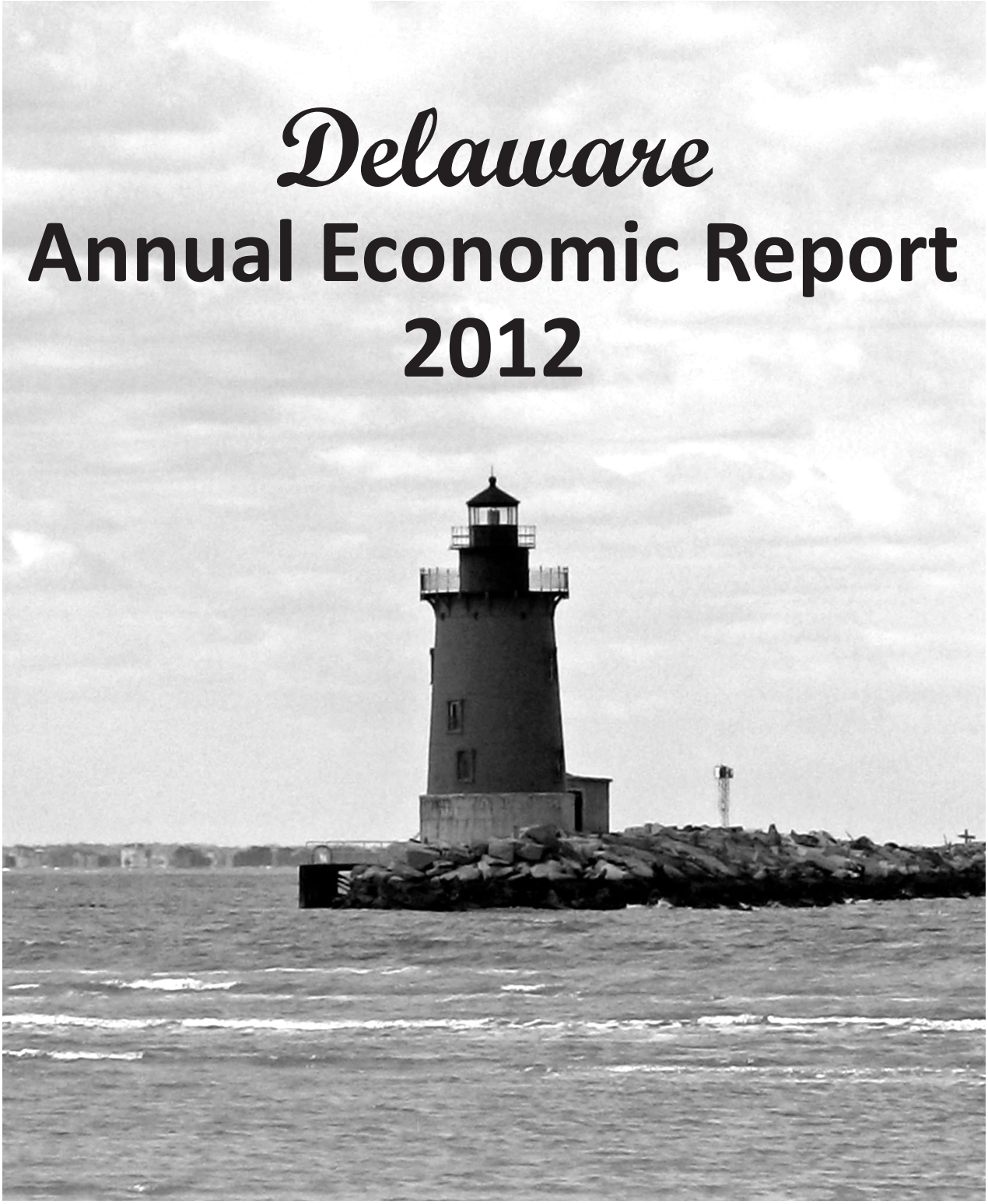
Delaware
Annual Economic Report
2012



Office of Occupational and Labor Market Information
Delaware Department of Labor
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DELAWARE DEPARTMENT OF LABOR
KEEPING DELAWARE FIRST

Delaware
Annual Economic Report 2012

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Introduction

The *2012 Delaware Annual Economic Report* was written by George Sharpley, Ph.D., Chief of the Office of Occupational and Labor Market Information (OOLMI), Delaware Department of Labor, and Thomas Dougherty, Labor Market Economist, OOLMI. The report was edited and formatted by Lyn Anderson, Production Coordinator, OOLMI.

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Overview of Employment by Industry

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 92.5 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, 2012 number as the industry employment level, and its difference from the corresponding December, 2011 level as the measure of 2012 job change. The reason for this is to better isolate actual 2012 changes in this annual report. If we used annual average data, the change between 2011 and 2012 would really measure two years of data, starting in January 2011, rather than focusing on 2012.

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, 2012 employment levels by industry for each level of government are listed below.

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 (a separate analysis later in this report specifically addresses interstate commutation). 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 2012. Health Care and Social Assistance, where employment increased by 1,520 jobs last year, is first.

In terms of job growth, Delaware's economy performed rather well in 2012, adding 5,710 net new jobs during the year (December 2011 to December 2012). This was the third consecutive year of job growth, and the most jobs added in the state since 2005. The gains were fairly broad-based, with 11 major industry sectors gaining jobs, and 6 major industry sectors losing jobs. Details can be found below. Please note that because some employment is considered multi-county, the sum of the number of jobs by county will not necessarily equal the statewide total.

Industry Employment of Government Workers, December 2012

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	1,519	0	1,519
Manufacturing	31-33	0	0	0	0
Wholesale Trade	42	0	0	0	0
Retail Trade	44-45	11	0	0	11
Transportation and Warehousing	48-49	1,825	1,245	305	3,375
Information	51	6	232	0	238
Finance and Insurance	52	55	0	0	55
Real Estate and Rental And Leasing	53	0	16	87	103
Professional and Technical Services	54	17	147	0	164
Management of Companies And Enterprises	55	0	0	0	0
Administrative and Waste Services	56	3	138	0	141
Educational Services	61	0	10,372	19,606	29,978
Health Care and Social Assistance	62	1,081	4,303	0	5,384
Arts, Entertainment, and Recreation	71	40	0	0	40
Accommodation and Food Services	72	46	0	0	46
Other Services, Except Public Administration	81	0	0	0	0
Public Administration	92	2,490	11,065	6,271	19,826
Total Industries	**Total**	**5,574**	**29,037**	**26,280**	**60,891**

1. Health Care and Social Assistance

Delaware's largest industry sector in terms of employment expanded further in 2012, adding 1,520 jobs, although this represented a slowdown from 2011, when 1,990 jobs were added. It ended 2012 with over 65,600 jobs in the state. The job gains were centered in Kent County, which added 660, for a total of 9,460 there in December 2012. New Castle County employment increased by 320 jobs; it remained the county the highest total in this industry, with just over 45,000 jobs. Sussex County also increased its Health Care workforce, adding 305 jobs, for a total of 10,555.

The average wage in Health Care and Social Assistance is slightly below the overall state average. It went from just below $49,000 in 2011 to $49,911 in 2012, an increase of 1.9 percent. Wages grew fastest, and remained lowest, in Kent County, where an increase of 3.2 percent left the average annual wage at $39,878. Average pay is considerably higher in New Castle County at $52,855 after gaining 2.5 percent for the year. Sussex County wages barely moved, growing by just 0.1 percent to $46,892.

There are four sub-sectors in this industry, with Hospitals being the largest and adding the second-most jobs in 2012. There were 22,940 jobs at hospitals in the state in 2012, 460 more than the previous year. Average pay was $62,802, which was a 4.0 percent increase from 2011. Ambulatory Services, which consists mostly of caregiver offices, was the next largest sub-sector, employing 18,950, an increase of 130 jobs over the year. Average pay was $59,505 in 2012, up by 1.1 percent from 2011. Social Assistance is the third largest sub-sector, with 12,370 jobs, 440 more than in 2011. About one-third of the employment here is at child day

care centers. Average pay in Social Assistance is relatively low, at $26,358 in 2012. Average pay increased by only 0.2 percent from 2011. The smallest sub-sector in Health Care is Nursing and Residential Care Facilities, with 11,360 jobs in 2012. It added the most jobs in 2012, gaining 490 in the course of the year. Average pay was $32,309, which was 2.6 percent higher than in 2011.

Health Care comprises 17.09 percent of all jobs in the state, versus 15.18 percent nationally for a location quotient of 1.13, fourth highest in the state.

2. Finance and Insurance

Finance and Insurance added 1,210 jobs in Delaware from December 2011 through December 2012, tying it with Professional, Scientific, and Technical Services for the second-most jobs added in 2012. The majority of the job growth was in New Castle County, where the number of jobs expanded by 760. Sussex County added 70 jobs in this sector, while Kent County‘s job total increased by 10 (some jobs are classified as multi-county, so the sum of the counties will not always equal the state total). With 33,820 jobs at the end of 2012, over 88 percent of the state’s total employment in this sector was located in New Castle County. It is the county’s second-largest sector, after Health Care and Social Assistance. There were 1,950 Finance and Insurance jobs in Sussex County, where it is the 8th largest sector. In Kent County, there were 1,160 jobs, making it only the 11th largest sector there.

Average wages in this sector were $86,525 in 2012, making it the 4th highest paying sector in the state. Pay varies quite a bit by county, with New Castle County highest at $89,276, Kent County at $70,606, and Sussex County considerably lower at $49,757. Wage gains over the year were exactly reversed; Sussex County average wages in this sector went up by 14.2 percent, Kent County’s by 12.7 percent, and New Castle’s by 2.3 percent. With so much of the sector’s employment in New Castle County, the statewide average wage went up by only a little more, at 2.6 percent.

All four sub-sectors gained jobs, with the largest, Credit Intermediation and Related Activities (the formal name for banking, both retail and credit card), adding the most with 730 net new jobs. This sub-sector lost over 1,100 jobs in 2011, so the two-year net job change is still negative. The Securities and Financial Investments sub-sector gained 330 jobs in 2012 after adding 800 jobs in 2011. Most of the state’s employment in this sub-sector is engaged in portfolio management, with average annual wages of $111,073 in 2012. There was an increase of 110 jobs in the Insurance sub-sector, which followed 600 jobs gained in 2011. The smallest sub-sector in the financial area, Funds and Trusts, is also the highest-paying, averaging over $165,000 in 2012. There were 40 jobs added there in 2012.

Finance and Insurance in Delaware has a location quotient of 2.14 when compared to the US as a whole. For the nation, this sector comprises 5.03 percent of total private employment, while in Delaware, it comprises 10.78 percent (10.78/5.03=2.14). This is the highest location quotient of any sector in the state.

3. Professional, Scientific, and Technical Services

This high-paying industry (its 2012 average wage of $97,589 made it the second-highest paying sector, after Management of Companies and Enterprises) gained 1,210 jobs in 2012, the same as Finance and Insurance. New Castle County added most of the new jobs, gaining 465. Kent County added 170 jobs, while Sussex County gained 150. Just over 83 percent of Delaware’s employment in this sector was located in New Castle County at the end of 2012.

Professional, Scientific, and Technical Services has no sub-sectors, but there are eight industry groups, the next level

Professional, Scientific, and Technical Services Industry Groups

Industry Group	December 2012 Employment	Job Change from Dec. 2011
Scientific Research	6,340	+500
Legal Services	5,290	+50
Computer Systems Design	4,380	+280
Architecture and Engineering	3,800	-10
Management Consulting	3,150	+230
Accounting Services	2,450	+90
Other Professional, Scientific, Technical Services	1,320	+30
Advertising	930	+5

of detail in the North American Industry Classification System (NAICS). The largest of these at the end of 2012 was Scientific Research, with 6,340 jobs. It consolidated this position in 2012 by adding 500 jobs, more than any other group in this sector. The next largest group, Legal Services, had 5,290 jobs in the state at the end of 2012, but added only 50 during the year. With 4,380 jobs, Computer Systems Design was third-largest; it gained 280 jobs during the year.

There was a strong increase in the average wage for the sector as a whole of 8.9 percent. In New Castle County, a 10 percent increase pushed the average wage to $104,320. Kent County saw the average wage increase even more, with a 12.6 percent gain, but it remained well below its northern neighbor, at $59,150. Wages in Sussex County were stagnant, rising only 0.6 percent, and they remained relatively low, at an average of $51,870.

Professional, Scientific, and Technical Services has a location quotient of 1.11, which means the state's jobs are 11 percent more concentrated in this sector than they are nationally. There are five sectors in the state with higher location quotients.

4. Transportation and Warehousing

The Transportation and Warehousing sector added 970 jobs in 2012. Although three other sectors added more jobs, the 7.6 percent growth here was the fastest of any sector, as it started from a smaller employment level. Most of the new jobs were in New Castle County, where employment increased by 940. Kent County also gained jobs in this sector, adding 170, but Sussex County lost 250 jobs. Two-thirds of the sector's total employment is in New Castle County.

There were solid increases in average pay of 5.9 percent statewide, although at $42,569, pay remains lower than the overall average. Wage gains were highest in Sussex County, rising by 13.7 percent, even as employment fell. Each of the other two counties saw wage gains over four percent.

Transportation and Warehousing has 11 sub-sectors, but five have very little employment in the state, and one, railroads, is outside the scope of this report, as they are not under the Unemployment Insurance system. Job growth in 2012 was dominated by the Warehousing sub-sector, which added 720 jobs, raising the total there to 2,600 jobs. Average pay in Warehousing was $47,318, an increase of 1.3 percent from 2011. The sub-sector Support Activities for Transportation, which includes such varied detailed industries as airport operations, port and harbor operations, and towing added 130 jobs during 2012, leaving average employment at 2,370 for the year. Average pay here was $52,176, which was an increase of 5.7 percent from 2011. Transit and Ground Transportation added 130 jobs in 2012; it remained the sector's largest sub-sector, with 2,980 jobs. Over half of the jobs here are in school bus transportation and part-time, which accounts for the much lower average pay of $27,952. Pay rose by 3.4 percent in this sub-sector. Couriers and Messengers was the only other sub-sector to add jobs in 2012, growing by 50 to 1,510. Average pay was $41,053, which was an increase of 3.1 percent from 2011. The Truck Transportation sub-sector lost 20 jobs, although average pay rose the most there, growing by 8.2 percent to $45,622. There were 2,280 jobs in this sub-sector. Postal Service jobs declined by 30, to a level of 1,820. Average pay rose in this sub-sector by 3.7 percent to a sector-highest $57,849.

Even with its rapid growth, Transportation and Warehousing remains a smaller proportion of the Delaware economy than in the national economy, with a location quotient of 0.71.

5. Accommodation and Food Services

The hospitality sector Accommodation and Food Services added 950 jobs in 2012, bringing the total number of jobs to 33,740. New Castle County already had over 20,000 of those jobs; it gained another 480 to end 2012 with 20,590 jobs in this sector. Sussex County gained nearly 300 jobs to end 2012 with 7,885 jobs. This sector is highly seasonal in Sussex County; employment rose to about 12,500 during the summer of 2012 there. Kent County passed the 5,000 job mark in this sector during 2012 by adding 160 jobs to end the year with 5,050 jobs.

Average wages are quite low, $16,788 in 2012, which was by far the lowest of any sector in the state. This can be partly explained by tips not being included in these wage estimates, and also by the high proportion of part-time workers. Two-thirds of this sector's workers in Delaware work part-time, the highest proportion of any industry sector in the state. The lowest average wage was in New Castle County, at $14,267. This was up by 3.0 percent from the previous year. Sussex County wages averaged $17,106, which was 2.9 percent higher than in 2011. Kent County average wages were slightly higher, at $17,171, 1.9 percent above the 2011 average there.

There are two sub-sectors, fittingly named Accommodation, and Food Services and Drinking Places. The latter, which consists of various types of restaurants, caterers, and bars, is by far the larger, with nearly 31,000 of the sector's 33,740 jobs. It also accounted for all of the jobs gained in 2012, adding 1,000 of them. The average wage is lower than in Accommodation. The average wage in Food Services was only $16,315, although that was up by 2.7 percent from 2011. The Accommodation sub-sector lost 60 jobs in 2012; it had an average employment of 2,850 during the year. Wages tend to be higher there, averaging $21,664 in 2012. This was up by 1.1 percent from 2011.

The proportion of Delaware's workers who are employed in Accommodation and Food Services, 10.18 percent, is very close to the 10.63 percent employed there nationally. The location quotient that results from these two percentages is 0.96.

6. Other Services

The Other Services industry sector added 670 jobs in 2012, sixth-highest among the state's industry sectors. New Castle County, where two-thirds of the sector's employment is based, added 325 jobs. There were 9,020 jobs there at the end of 2012. Sussex County added 310 jobs, to finish the year with 2,460. There were 80 jobs added in Kent County, for a total of 1,830 there. It should be noted that this sector has a large number of workers who fall outside the Unemployment Insurance system, mostly those at religious establishments. There are probably about 7,000 such workers in the state; they are not included in the numbers reported here.

Average wages in the Other Services fell by 0.9 percent in 2012 to $27,331. They fell the most, but remained highest, in New Castle County. The average there was $28,327, which was down by 1.9 percent from 2011. Sussex County average wages rose a scant 0.1 percent to $25,032, while in Kent County they fell by 0.1 percent to $23,943.

Four sub-sectors make up the industry. Membership Associations and Organizations is the largest, with 4,700 jobs in 2012, up by 90 from 2011. The average wage in this sub-sector was $24,210; it increased by 1.2 percent last year. Personal and Laundry Services is the second-largest sub-sector. There was an increase of 230 jobs there in 2012; total employment was 4,500 at the end of 2012. The average wage was $23,253, which represented an increase of 0.9 percent over 2011. The Repair and Maintenance sub-sector had the sector's highest average wage by far, at $40,377, which was up by 0.6 percent from 2011. There were 100 jobs added during 2012 to get to a total of 3,280. The smallest sub-sector is Private Households. There were 1,200 workers reported at private households in 2012, 260 more than in 2011. The average wage for them fell by 9.4 percent, to $18,801.

Delaware has 3.9 percent of its jobs in Other Services, and the US has 4.11 percent. The location quotient is 0.95.

7. Construction

Employment in the Construction sector rose for the first time in several years, with 420 jobs gained in 2012. Total employment in the sector was 20,660 at the end of 2012, including the 1,520 in this sector employed by government agencies. Total private employment, where all the gains were, was 19,140. Job gains and total employment were both highest in New Castle County, where 460 jobs gained led to a job total of 12,765 there. Sector employment in Kent County increased by 80, for a total of 2,120 jobs there. Sussex County gained 30 jobs in the sector, ending the year with 3,640. There was a sizable decrease in the number of Construction jobs considered multi-county.

Wages in the Construction sector are close to the overall state average, at $51,031 in 2012. This was down from $51,212 in 2011. The drop in average pay was centered in Sussex County, where wages fell by 5.6 percent. The other two counties saw slight increases in their average wages. Pay was considerably higher in New Castle County, averaging $54,989 there in 2012. In Kent County, the average wage was $43,752, while Sussex County fell further behind – pay there averaged $39,188.

There are three sub-sectors in Construction. Specialty Trade Contractors is the largest, with 12,330 jobs in the state, an increase of 490 jobs during 2012. Average pay was $49,281. The Construction of Buildings sub-sector employed 4,620 in December 2012, paying an average $53,691 per worker. The number of jobs there increased by 90. The smallest sub-sector, Heavy and Civil Engineering Construction, lost 160 jobs in 2012 to end the year with 3,710. Pay there is also the lowest of the three sub-sectors, at $46,734.

Construction employment is down in Delaware by nearly 10,000 jobs from its peak in the middle of the last decade, but it still has an above average proportion of the state's economy. The location quotient for 2012 was 1.06, with 5.37 percent of the state's workers in this sector, compared with 5.05 percent nationally.

8. Educational Services

Employment in the Education sector, including local government public schools, state government charter schools and post-secondary education, and private schools at all levels, rose by 300 jobs in 2012. Most of the gains were in New Castle County, which added 185 jobs to get to a total of 21,820. Employment in Sussex County rose by 115, to 5,595. There were only 20 jobs added in Kent County, where employment in this sector totaled 7,180.

Most of the job gains were in the smallest ownership group, private schools. There were 200 jobs added there, bringing the statewide total to 4,660. The local government public schools increased employment by 170, for a total of 19,610 at the end of 2012. State government-owned schools lost 70 jobs, dropping the total jobs at those schools to 10,370.

Average wages were highest in the state government Education sector, which includes state colleges and universities along with charter schools. The average wage there was $62,620 in 2012, which was up by 4.7 percent from the previous year. Local government public schools had average wages of $49,232 in 2012, which was up by 2.8 percent from 2011. Private schools had the lowest average wage, $42,432, even after rising by 4.3 percent from 2011.

The location quotient for this sector includes only privately-owned institutions. It was just over half the national average, at 0.56.

9. Administrative and Waste Services

Administrative and Waste Services tied with Educational Services in job growth during 2012, also adding 300 jobs. There was greater apparent movement between counties, but that came about mostly due to a firm which had been reported with a single location in Kent County in 2011 reporting a location in New Castle County and one in Sussex County in 2012, with no location in Kent County. Most of the changes in the county employment totals were as a result of this reporting change. The Kent County jobs total for this sector fell by 470 (18.5 percent), while the number of jobs increased in Sussex County by 150 and in New Castle County by 610. There were a total of 23,720 jobs in this sector in Delaware at the end of 2012.

The statewide average wage of $33,655 in 2012 was an increase of 3.6 percent over 2011. New Castle County had the highest average wage at $35,132. The other two counties had average wages below $30,000; $28,933 in Kent County, and $26,968 in Sussex County.

There are two sub-sectors in this industry sector. Administrative and Support Services, which includes call centers, temporary help agencies, landscaping, and janitorial services, is by far the largest, with 22,410 jobs. Average pay there was $32,661 in 2012. The Waste Management and Remediation sub-sector is much smaller, with just over 1,300 workers, but the average pay is higher, at $50,173.

The Administrative and Waste Services industry sector is underrepresented in Delaware. Employment here is 6.25 percent of the state total, where in the US, 7.21 percent of all jobs are in this sector, giving a location quotient of 0.87.

10. Manufacturing

After losing almost 700 jobs in 2011, the Manufacturing sector added back 280 jobs in 2012. There were offsetting gains and losses across the 20 sub-sectors we publish data for, but most of the gains were in Food Manufacturing, and based in Sussex County. There were 290 net job gains in Food Manufacturing, raising the statewide total to 8,650. Nearly 90 percent of those jobs are located in Sussex County, primarily in poultry processing. Manufacturing is the second-largest sector in Sussex County in terms of number of jobs; Retail Trade is first. Manufacturing employment declined slightly in New Castle County, falling by 40 jobs to a total of 11,830. There were 50 jobs added to this sector in Kent County, but Manufacturing remains a relatively small sector there, with 3,350 employed.

Average wages vary greatly in Manufacturing, both across counties and across sub-sectors. Though the average wage fell in New Castle County by 0.7 percent in 2012, at $76,086 it remained more than double that of Sussex County. There, even after a gain of 6.2 percent from 2011, the average wage was $36,855. Wages in Delaware's middle county were also in between – Kent County wages in this sector rose by 4.5 percent to $57,172.

Average wages in the manufacturing sub-sectors ranged from a low of $33,108 in Food Manufacturing to $115,179 in Petroleum Products Manufacturing. Food Manufacturing is by far the largest sub-sector, with 8,650 jobs in 2012; it also gained the most jobs last year, adding 290. Computer and Electronic Product Manufacturing is the state's second-largest manufacturing sub-sector, with 2,820 jobs. Jobs there pay above-average wages, averaging $92,534 in 2012. There were 160 jobs lost in this sub-sector in 2012. Chemical Manufacturing is the third-largest subsector, with 2,700 jobs, up by 180 from 2011. Pay in Chemical Manufacturing is well above average, at $84,387. Two other Manufacturing sub-sectors employed over 1,500 workers: Fabricated Metal Products, with 1,600 jobs, down by 30 over the year, and Plastics and Rubber Products, also with 1,600 jobs. This was a decline of 20 jobs from 2011. Average wages were higher in Plastics and Rubber Products, at $59,338. Pay averaged $51,780 for workers in Fabricated Metal Products.

Employment in Manufacturing is substantially lower in Delaware than in the US as a percentage of total jobs. Its location quotient is 0.69, third-lowest of any industry sector in the state. Across the nation, this sector comprises 10.76 percent of total employment, while in Delaware, it is 7.47 percent.

11. Utilities

The 120 jobs added in the Utilities sector was a relatively low number in absolute terms, but it represented a growth rate of 6.1 percent, due to the overall small size of the sector. There were a total of 2,090 jobs in the sector at the end of 2012, up from 1,970 in 2011. Most of those jobs were in New Castle County, where there were 1,515 employed, an increase of 135 from 2011. Sussex County had 350 jobs in Utilities at the end of 2012, 10 fewer than the previous year. The sector is smallest in Kent County, where a decrease of 5 jobs during the year brought the total to 220. Average pay is high in Utilities; it is the third-highest paying sector in the state, with an average wage of $95,701 in 2012.

There are no sub-sectors in the Utilities sector, but there are three separate industry groups: Electric Power Generation, Transmission, and Distribution; Natural Gas Distribution; and Water and Sewage. The Electric industry group is by far the largest of the three in Delaware. It had 1,600 employees at the end of 2012 after adding 100 jobs during the year. The Natural Gas Distribution industry group also added jobs during 2012, gaining 30 jobs to get to a total of 80. Water and Sewage employment fell back slightly, going from 420 in 2011 to 410 in 2012.

The Utilities sector is relatively small, but with a location quotient of 1.17, it comprises more of Delaware's economy than the US average. In Delaware, 0.58 percent of all jobs were in Utilities; across the US 0.50 percent of all jobs were in this sector.

12. Wholesale Trade

Where the previous eleven industry sectors all gained jobs in 2012, Wholesale Trade is the first of the six sectors which lost jobs, with employment falling by 90 over the year. The sector ended 2012 with 12,410 jobs in the state. Sussex County bucked the state trend, adding 130 jobs for a total of 1,455 there. There were 300 jobs lost in this sector in New Castle County, leaving the county with a total of 8,280, while Kent County employment fell by 40 to 1,080.

Average wages in Wholesale Trade are high, at $81,326 in 2012, although that was down by 1.4 percent from 2011. New Castle County's wages were the highest by far, at $91,135. The average wage was much lower in Sussex County at $52,298, and lower still in Kent County, at $44,794.

There are three sub-sectors in Wholesale Trade. Durable Goods wholesale was the only sub-sector to add jobs in 2012, gaining 260. It is also the lowest-paying of the three, with an average wage of $56,391. The other two sub-sectors each lost over 100 jobs, with Non-durables wholesale losing 220 jobs. It has the highest average pay in the sector, at $106,714. The Wholesale Electronic Markets sub-sector lost 130 jobs; it remains less than half the size of the other two sub-sectors. Average pay was $77,890 there in 2012.

Employment in Wholesale Trade in Delaware is considerably below the national average, with a location quotient of 0.71. Nationally, this sector makes up 5.11 percent of all jobs, while in Delaware, it makes up 3.62 percent.

13. Real Estate and Rental and Leasing

Already one of the smallest industry sectors in terms of employment, Real Estate and Rental and Leasing lost 110 jobs in 2012, ending the year with a total of 5,270 jobs. There were job losses in each county, as the southern two counties each lost between 10 and 20 jobs, while New Castle County lost just over 100. Average wages are a little below the overall average in New Castle County, at $47,339. They are considerably lower in Kent County, at $33,050, and in Sussex County, where the average pay in this sector is $33,468.

There are two sub-sectors in this industry. Real Estate is the larger of the two, with 4,050 workers at the end of 2012, which was down by 120 from the previous December. Average pay was $41,368 in 2012, an increase of 1.0 percent from 2011. The remainder of the sector's employment is in the Rental and Leasing Services sub-sector, where employment was flat during the year. Average pay was slightly higher, at $45,056 in 2012, which was up by 1.5 percent from 2011.

Delaware employment in Real Estate and Rental and Leasing is slightly lower than the national average. The location quotient for this sector is 0.89.

14. Retail Trade

Until five years ago, Retail Trade was Delaware's largest industry in terms of employment. Health Care and Social Assistance surpassed it in 2008, and continues to widen the gap as it has continued to grow, while the retail sector has not. After adding 190 jobs in 2011, Retail Trade lost 130 jobs in 2012. Total employment in the sector is now just over 53,000 jobs. Most of the jobs lost were in Sussex County, where employment fell by 210 jobs, to 11,280 at the end of 2012. Even so, Retail Trade remains as the industry sector with the most jobs in Sussex County. Kent County also lost jobs in retail; the total there fell to 9,685 jobs, 160 less than in December 2011. New Castle County, where the bulk of retail jobs are located, added 50 jobs for a total of 31,320 in 2012.

Average pay is fairly low in the Retail Trade Sector, at least partly due to the high proportion of part-time jobs in the industry. It rose by only 0.7 percent in 2012, to get to $26,157. Pay is pretty uniform across the state, averaging $26,962 in New Castle County, $24,968 in Kent County, and $24,215 in Sussex County.

There are 12 sub-sectors in Retail Trade, with the largest being General Merchandise Stores (department and discount stores). There were 10,120 workers in these stores on average in 2012, rising to 11,210 in December. This was 370 fewer jobs than in December 2011. Average pay was $19,266, which was up by 2.7 percent from 2011. The second-largest sub-sector is Food and Beverage Stores, with 9,060 average employment during the year. It also gained the most jobs of any retail sub-sector, adding 390 to finish 2012 with 9,170 jobs. Average pay was $22,163, down by 3.0 percent from 2011. Motor Vehicle and Parts Dealers is the third-largest sub-sector, and highest paying. This sub-sector ended 2012 with 6,510 jobs, an increase of 70 jobs from 2011. Jobs there paid an average of $43,583. This was down by 0.1 percent from 2011.

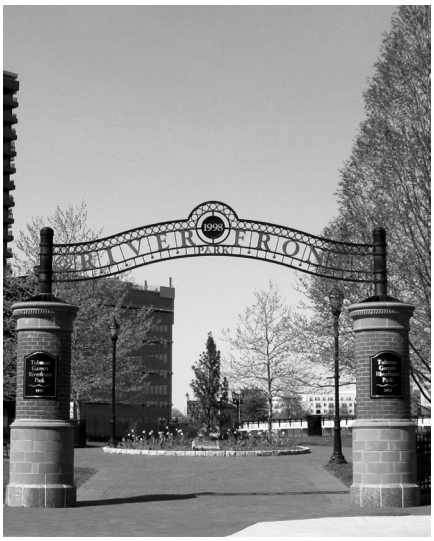
Employment in Retail Trade in Delaware is slightly above the national average. There were 14.69 percent of the state's workers employed in this sector, compared with 13.44 percent nationally. This gives a location quotient of 1.09.

15. Arts, Entertainment, and Recreation

After gaining 1,155 jobs in 2010, the Arts, Entertainment, and Recreation sector has lost almost half as many over the past two years, with employment falling by 220 in 2011 and by 280 in 2012 to a total of 7,660 at the end of 2012. Most of the jobs lost were in New Castle County, where employment fell by 265 to end the year with 4,250 jobs. Kent County lost 90 jobs to end 2012 with 2,630 in this sector, while Sussex County gained 60 jobs, for a total of 730.

Average pay also fell in this sector, falling by 2.2 percent to a statewide average of $27,478. Average pay dropped by the most in Sussex County, where it was already the lowest. The $21,651 average pay there for 2012 was 3.8 percent below that of 2011. In Kent County, average pay fell by 1.8 percent to $27,840, and in New Castle County it fell by 1.5 percent to $28,630.

There are three sub-sectors in Arts, Entertainment, and Recreation, with the Amusement, Gambling, and Recreation sub-sector being by far the largest, employing over 6,400



people at the end 2012. This sub-sector lost 60 jobs in 2012. It also has the lowest average pay of the three, at $25,681, which was down by 1.8 percent from 2011. The Museums and Historical Sites lost the most jobs in 2012, with employment falling by 130 to 670 workers at the end of 2012. Average pay increased here by 6.8 percent to $30,409. The highest-paying subsector is also the smallest; the 560 people employed in Performing Arts and Spectator Sports earned an average of $43,301 in 2012. The average pay fell by 6.8 percent from 2011, while the number employed fell by 90.

Even after losing jobs the past two years, the Arts, Entertainment, and Recreation sector still has the second-highest location quotient in the state. At 1.38, it is second only to Finance and Insurance.

16. Information

The Information sector lost 330 jobs in 2012, making it the second-worst performing sector for the year. It also lost 330 jobs in 2011. It is a small sector, and obviously getting smaller, with 5,560 workers at the end of 2012. There were 4,270 of those workers employed in New Castle County in 2012, down by 190 from the previous year. Sussex County employment fell by 40 to 465, while in Kent County there were 425 workers in this sector, 15 fewer than in 2011.

Wages are above average in this sector, though there is disparity between the counties that increased in 2012. The state average wage was $59,230 in 2012, which was up by 3.2 percent from 2011. Average pay increased in New Castle County by 3.0 percent, to $60,261. It was essentially unchanged in Kent County at $46,968, just 0.2 percent above the 2011 level there. Average wages declined dramatically in Sussex County, falling by 14.0 percent to $42,539.

There are six sub-sectors in Information, though only three have a sizeable presence in the state. Telecommunications is the largest, with 2,350 jobs in December, 2012. This was down by 410 jobs from 2011. The sub-sector ISPs, Search Portals, and Data Processing had more steady employment, gaining 10 jobs. It is also the highest-paying sub-sector in this industry, averaging $77,691 in 2012. Publishing had 910 jobs at the end of 2012, 20 fewer than at the end of 2011. Other sub-sectors with 350 or fewer workers in the state include Motion Pictures and Sound Recording, and Broadcasting.

The Information sector is underrepresented in Delaware, as compared with the nation. Its location quotient of 0.65 is among the lowest of all industry sectors in the state. There were 2.42 percent of US workers in this industry in 2012, with only 1.58 percent of Delaware's workers employed in the Information sector.

17. Management of Companies and Enterprises

The biggest job loser of 2012 was this sector, which administers and manages operations for other parts of the same company (headquarters). It also includes holding companies which control the securities of other establishments. There were 600 jobs lost in this sector in 2012, driving the total number of jobs at the end of the year to 7,380. Almost all of this sector's jobs, and job losses, are and were in New Castle County, where the number declined by 760 to 6,805 at the end of 2012. Kent County added 10 jobs to get to 190 total jobs in this sector, and Sussex County gained 20, for a total of 170. The discrepancy between the state job change and the sum of the county changes is due to establishments that are considered multi-county.

Management of Companies and Enterprises is Delaware's highest-paying industry sector, with average pay of $129,265 in 2012, which was up by 0.8 percent from 2011. There are no sub-sectors or industry groups in this sector.

Even with only 2.17 percent of the state's total private employment, Management of Companies and Enterprises is overrepresented in the Delaware economy. The corresponding national percentage is only 1.81 percent, for a location quotient of 1.20.

Industry Wages and Job Change Table

NAICS	Industry	2012 Ave. Wage	2012	2011	Job Change
	Total Covered Employment	**$51,728**	**412,170**	**406,460**	**5,710**
22	**Utilities**	**$95,701**	**2,090**	**1,970**	**120**
23	**Construction**	**$51,031**	**20,660**	**20,240**	**420**
236	Construction of buildings	$53,691	4,620	4,530	90
237	Heavy and civil engineering construction	$46,734	3,710	3,870	-160
238	Specialty trade contractors	$49,281	12,330	11,840	490
31	**Manufacturing**	**$57,159**	**25,740**	**25,460**	**280**
311	Food manufacturing	$33,108	8,650	8,360	290
312	Beverage and tobacco product manufacturing	$68,921	240	240	0
313	Textile mills	$77,197	560	570	-10
314	Textile product mills	$42,638	90	90	0
315	Apparel manufacturing	$24,685	170	150	20
321	Wood product manufacturing	$38,732	300	300	0
322	Paper manufacturing	$59,844	810	820	-10
323	Printing and related support activities	$44,446	690	730	-40
324	Petroleum and coal products manufacturing	$115,179	680	690	-10
325	Chemical manufacturing	$84,387	2,700	2,520	180
326	Plastics and rubber products manufacturing	$59,338	1,600	1,620	-20
327	Nonmetallic mineral product manufacturing	$45,019	460	560	-100
331	Primary metal manufacturing	$69,546	640	630	10
332	Fabricated metal product manufacturing	$51,780	1,600	1,630	-30
333	Machinery manufacturing	$55,076	660	640	20
334	Computer and electronic product manufacturing	$92,534	2,820	2,980	-160
335	Electrical equipment and appliance mfg.	$93,877	650	590	60
336	Transportation equipment manufacturing	$57,891	610	610	0
337	Furniture and related product manufacturing	$41,374	680	700	-20
339	Miscellaneous manufacturing	$54,690	1,150	1,100	50
42	**Wholesale trade**	**$81,326**	**12,410**	**12,500**	**-90**
423	Merchant wholesalers, durable goods	$56,391	5,130	4,870	260
424	Merchant wholesalers, nondurable goods	$106,714	5,140	5,360	-220
425	Electronic markets and agents and brokers	$77,890	2,140	2,270	-130
44	**Retail Trade**	**$26,157**	**53,070**	**53,200**	**-130**
441	Motor vehicle and parts dealers	$43,583	6,510	6,440	70
442	Furniture and home furnishings stores	$32,186	1,950	2,060	-110
443	Electronics and appliance stores	$32,121	2,080	2,140	-60
444	Building material and garden supply stores	$30,789	4,170	4,260	-90
445	Food and beverage stores	$22,163	9,170	8,780	390

Industry Wages and Job Change Table

NAICS	Industry	2012 Ave. Wage	2012	2011	Job Change
446	Health and personal care stores	$33,159	3,680	3,630	50
447	Gasoline stations	$19,652	2,320	2,110	210
448	Clothing and clothing accessories stores	$16,934	6,380	6,290	90
451	Sporting goods, hobby, book and music stores	$19,481	1,790	1,820	-30
452	General merchandise stores	$19,266	11,210	11,580	-370
453	Miscellaneous store retailers	$20,778	2,800	2,850	-50
454	Nonstore retailers	$42,379	1,020	1,240	-220
48	**Transportation and warehousing**	**$42,569**	**13,720**	**12,750**	**970**
481	Air transportation	$107,531	110	110	0
484	Truck transportation	$45,622	2,280	2,300	-20
485	Transit and ground passenger transportation	$27,952	2,980	2,850	130
488	Support activities for transportation	$52,176	2,370	2,240	130
491	Postal Service	$57,849	1,820	1,850	-30
492	Couriers and Messengers	$41,053	1,510	1,460	50
493	Warehousing and storage	$47,318	2,600	1,880	720
51	**Information**	**$59,230**	**5,560**	**5,890**	**-330**
511	Publishing industries, except Internet	$53,816	910	930	-20
512	Motion picture and sound recording industries	$20,598	350	280	70
515	Broadcasting, except Internet	$45,029	290	270	20
517	Telecommunications	$61,325	2,350	2,760	-410
518	ISPs, search portals, and data processing	$77,691	1,370	1,360	10
519	Other information services	$34,472	290	290	0
52	**Finance and insurance**	**$86,525**	**38,270**	**37,060**	**1210**
522	Credit intermediation and related activities	$82,910	25,470	24,740	730
523	Securities, commodity contracts, investments	$110,073	5,540	5,210	330
524	Insurance carriers and related activities	$77,617	6,900	6,790	110
525	Funds, trusts, and other financial vehicles	$165,003	360	320	40
53	**Real estate and rental and leasing**	**$42,021**	**5,270**	**5,380**	**-110**
531	Real estate	$41,368	4,050	4,170	-120
532	Rental and leasing services	$45,056	1,210	1,210	0
54	**Professional and technical services**	**$97,589**	**27,880**	**26,670**	**1210**
55	**Management of companies and enterprises**	**$129,265**	**7,380**	**7,980**	**-600**
56	**Administrative and waste services**	**$33,655**	**23,720**	**23,420**	**300**
561	Administrative and support services	$32,661	22,410	22,070	340
562	Waste management and remediation services	$50,173	1,310	1,350	-40

Industry Wages and Job Change Table

NAICS	Industry	2012 Ave. Wage	2012	2011	Job Change
61	**Educational services**	**$42,438**	**34,640**	**34,340**	**300**
62	**Health care and social assistance**	**$49,911**	**65,620**	**64,100**	**1520**
621	Ambulatory health care services	$59,505	18,950	18,820	130
622	Hospitals	$62,802	22,940	22,480	460
623	Nursing and residential care facilities	$32,309	11,360	10,870	490
624	Social assistance	$26,358	12,370	11,930	440
71	**Arts, entertainment, and recreation**	**$27,478**	**7,660**	**7,940**	**-280**
711	Performing arts and spectator sports	$43,301	560	650	-90
712	Museums, historical sites, zoos, and parks	$30,409	670	800	-130
713	Amusements, gambling, and recreation	$25,681	6,430	6,490	-60
72	**Accommodation and food services**	**$16,788**	**33,740**	**32,790**	**950**
721	Accommodation	$21,664	2,850	2,910	-60
722	Food services and drinking places	$16,315	30,880	29,880	1000
81	**Other services, except public administration**	**$27,331**	**13,670**	**13,000**	**670**
811	Repair and maintenance	$40,377	3,280	3,180	100
812	Personal and laundry services	$23,253	4,500	4,270	230
813	Membership associations and organizations	$24,210	4,700	4,610	90
814	Private Households	$18,801	1,200	940	260
92	**Public Administration**	**$51,948**	**19,830**	**20,020**	**-190**

Area 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 7.1% in 2012 was ranked as the 23rd lowest rate in the nation. Of Delaware's neighboring states of Maryland, New Jersey, and Pennsylvania, only Maryland had a more favorable (lower) ranking. Maryland's annual average unemployment rate ranked 17th lowest in the nation, followed by Delaware at 23rd, Pennsylvania at 30th, and New Jersey at 47th.

While Delaware's and Maryland's unemployment rates fell in 2012 from 2011 by 0.3 and 0.5 percentage points, respectively, Pennsylvania's rate was unchanged and New Jersey's rate went up by 0.1 percent point. Despite Delaware's decline in its annual average unemployment rate, its national ranking rose. Delaware's neighbors also saw increases in their national rankings with New Jersey losing the most ground, increasing ten places from 37th to 47th.

Area Annual Unemployment Rates

	Unemployment Rate		National Ranking*	
	2011	2012	2011	2012
Delaware	7.4	7.1	18	23
Maryland	7.3	6.8	15	17
New Jersey	9.4	9.5	37	47
Pennsylvania	7.9	7.9	24	30
United States	8.9	8.1	--	--
* Lower Ranking Indicates More Favorable Rate				

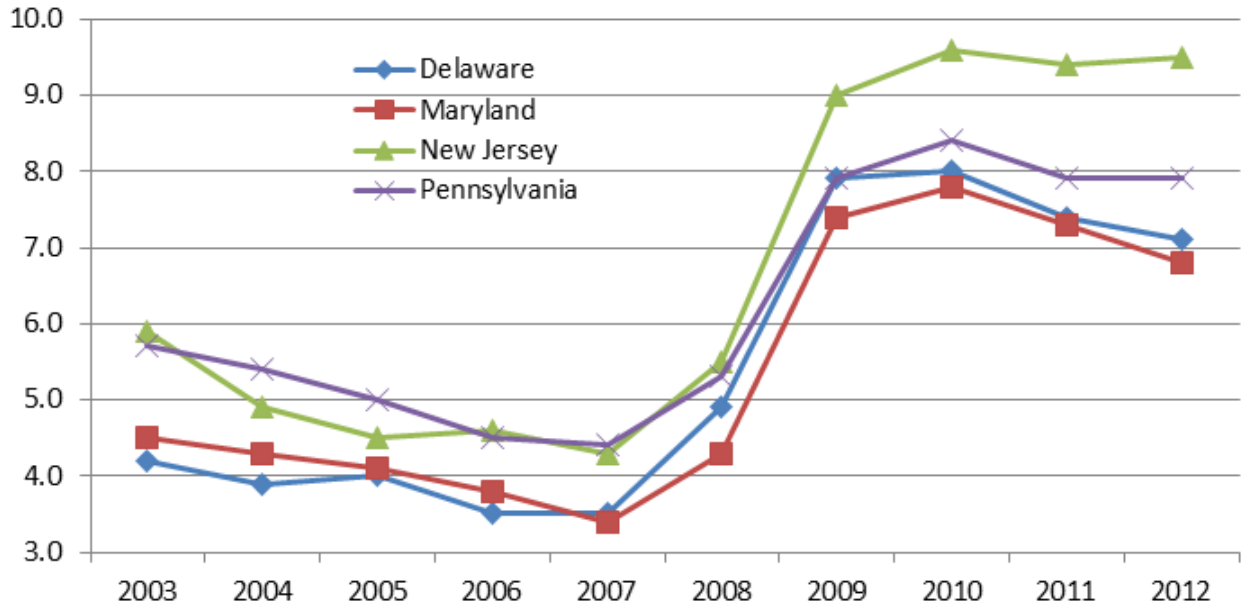
Delaware and Neighboring States Annual Unemployment Rates, 2003-2012

Between 2003 and 2006, Delaware had the lowest annual unemployment rate among our neighboring states of Maryland, New Jersey, and Pennsylvania. Since 2007, only Maryland has had a lower rate than Delaware. New Jersey was hit particularly hard by the recession that began in December 2007 and ended June 2009 with an unemployment rate peaking at 9.6 percent in 2010. All four states' unemployment rate peaked in 2010.

Annual Unemployment Rate (%)

Year	DE	MD	NJ	PA
2003	4.2	4.5	5.9	5.7
2004	3.9	4.3	4.9	5.4
2005	4.0	4.1	4.5	5.0
2006	3.5	3.8	4.6	4.5
2007	3.5	3.4	4.3	4.4
2008	4.9	4.3	5.5	5.3
2009	7.9	7.4	9.0	7.9
2010	8.0	7.8	9.6	8.4
2011	7.4	7.3	9.4	7.9
2012	7.1	6.8	9.5	7.9

Annual Unemployment Rate



County Unemployment Rates

In 2012, New Castle County and Sussex County had annual unemployment rates of 7.0 percent. New Castle County was down 0.3 percentage points from 7.3 percent in 2011 and Sussex County's rate fell by 0.5 percentage points from 7.5 percent in 2011. Kent County had the highest rate of the three counties at 7.6 percent. Its rate dropped the least of the three counties, declining by 0.2 percentage points from 7.8 percent in 2011.

From 2002 through 2007, New Castle County's unemployment rate was highest among Delaware's counties. In 2008, Sussex County's rate of 5.0 percent was one-tenth higher than the 4.9 percent posted by each of the other two counties, while in 2009 Sussex County and New Castle County tied for the highest rate at 7.9 percent. Since the end of the Great Recession, from 2010 through 2012, Kent County has had the highest annual unemployment rate of Delaware's three counties.

Annual Unemployment Rate for Kent,New Castle, and Sussex Counties

State and County Commuting Patterns

The U.S. Census Bureau provides estimates on the number commuters to and from a particular area, such as a state or a county. The source of the commuting pattern data for Delaware is the U.S. Census Bureau's 5-year 2006 to 2010 American Community Survey, and the 1990 and 2000 Census. The data source for the counties is from U.S. Census Bureau's 5-year 2006 to 2010 American Community Survey.

Delaware Commuting Patterns

The 2006-2010 American Community Survey estimates that there were 412,021 workers who lived in Delaware and commuted to work either inside or outside of Delaware. Workers who worked from home and did not commute were not included in the estimate. The number of workers who lived in Delaware but worked outside of Delaware was 55,476. Therefore, the percentage of workers who lived in Delaware, but commuted to work outside of the state was 13.5 percent. Of the 55,476 workers commuting out of Delaware, nearly 93 percent of them were going to just three states: Pennsylvania, Maryland, and New Jersey. The number of Delaware residents commuting for work to Pennsylvania was 27,881, to Maryland it was 17,927, and 5,755 commuted to New Jersey.

Delaware Commuting Patterns

	1990 Census	2000 Census	2006–2010 American Community Survey
Live in Delaware, work outside of Delaware	32,367	42,894	55,476
Percent Live in Delaware, work outside of Delaware	9.7%	11.5%	13.5%
Work in Delaware, live outside of Delaware	46,669	60,401	63,091
Percent work in Delaware, live outside of Delaware	13.4%	15.5%	15.0%
Net Flow of Commuters Coming to Delaware for Work	14,302	17,507	7,615

The commuter flows examined above were those who lived in Delaware and commuted to work outside of Delaware. The next commuter flows to be examined are those who worked in Delaware but lived outside of Delaware. The total number of people who worked in Delaware and either lived in Delaware or lived outside of Delaware was 419,636. There were 63,091 people who worked in Delaware, but lived outside of Delaware. In percentage terms, 15 percent of Delaware workers lived outside of the state and commuted to Delaware for work. With 55,476 workers commuting out of Delaware for work and 63,091 coming to Delaware for work, there was a net commuter flow of 7,615 more workers coming to Delaware than leaving Delaware for work. Of the 63,091 workers commuting to Delaware, over 96 percent of them were coming from three states: Pennsylvania, Maryland, and New Jersey. There were 31,034 Pennsylvania residents commuting into Delaware to work, 21,800 commuted in from Maryland, and 8,106 workers in Delaware lived in New Jersey.

Data from the 1990 and 2000 Census combined with the 2006-2010 American Community Survey data show that there has been a shift in commuting patterns over time. As the population and workforce have grown, there has been an increase in the number of workers commuting from one state to another. In 1990, there were 32,367 workers living in Delaware but commuting for work to another state. That number had grown to 42,894 in 2000 and to 55,476 in the 2006-2010 5-year average. If we look at the number of Delawareans commuting to another state as a percentage of all Delaware workers living in Delaware, the number of commuters has grown rather quickly from 9.7 percent in 1990, 11.5 percent in 2000, and 13.5 percent in 2006-

2010. At the same time that we have had a rapid increase in the number of Delawareans leaving the state for work, the number of workers living in other states and working in Delaware has not had as rapid an increase. This has caused the net commuter flow of workers to shrink. In 1990, the number of people working in Delaware but living in a different state was 46,669. That number grew to 60,401 in 2000 and to 63,091 in the 2006 to 2010 average. The percentage of Delaware workers commuting from another state has grown from 13.4 percent in 1990, to 15.5 percent in 2000, but fell to 15 percent in the 2006 to 2010 average. The net commuter flow was 14,302 in 1990. It increased to 17,507 in 2000, but then fell to 7,615 in the 2006 to 2010 period.

County Commuting Patterns: American Community Survey 2006-2010

	Kent	New Castle	Sussex
Live in county, work outside of county	18,493	44,098	18,996
Percent live in county, work outside of county	26.2%	17.0%	23.0%
Work in county, live outside of county	12,539	64,752	11,911
Percent work in county, live outside of county	19.4%	23.2%	15.8%
Net Flow of Commuters Coming to County for Work	-5,954	20,654	-7,085

Kent County

The 2006-2010 American Community Survey estimates that there were 70,667 workers who lived in Kent County and commuted for work either in Kent County or to some other state or county. Workers who worked from home and did not commute were not included in the estimate. The number of people who lived in Kent County but worked outside of Kent County was 18,493. That means that 26.2 percent of all workers living in Kent County traveled outside of the county to go to work. Kent had the highest percentage of workers that commuted to another county for work of all three counties in Delaware. The top destination for workers leaving Kent County was New Castle County, with 8,709 workers. This was followed by 5,573 workers commuting to Sussex County. In total, of the 18,493 commuters leaving Kent County, 14,282 were either going to work in New Castle County or Sussex County. The top three out-of-state work destinations for Kent County residents were Caroline County, Maryland with 398, Cecil County, Maryland with 379, and Philadelphia County, Pennsylvania with 316.

The commuter flows examined above were those who lived in Kent County and commuted for work in Kent County or to some other county. The next commuter flows to be examined are those who worked in Kent County and who either lived in Kent or lived outside of Kent County. Starting with those who worked in Kent County, but lived in or out of Kent County, it was estimated by the American Community Survey that there were 64,713 of these people. The number of people who worked in Kent, but lived outside of Kent County was 12,539. Therefore, 19.4 percent of the people who worked in Kent County lived outside of Kent County. There was a county net commuter flow of 5,954 fewer people coming to Kent County for work than there was leaving Kent County for work. Of the 12,539 commuters coming to Kent county for work, 9,870 were either coming from New Castle County or Sussex County. The number of people who worked in Kent, but lived in New Castle was 3,589 and the number of people who worked in Kent but lived in Sussex was 6,281. Residents of the Maryland counties of Caroline, Queen Anne's, and Wicomico made up the next three highest numbers of commuters coming to Kent County for work with 547, 340, and 277 workers, respectively.

New Castle County

There were 258,813 people who lived in New Castle County and either commuted for work within New Castle or commuted outside the county for work. The number of people that lived in New Castle County but commuted outside the county for work was 44,098. Therefore, 17 percent of all workers living in New Castle County traveled outside the county for work. Of the 44,098 workers living in New Castle but commuting outside of New Castle

County, 4,115 had a destination inside the state to either Kent County, with 3,589 or Sussex County, with 526. The top out of state destinations were Delaware County, Pennsylvania with 9,907, Philadelphia County, Pennsylvania with 7,746, and Chester County, Pennsylvania with 6,697.

We will now examine the commuter flows of those who worked in New Castle County. The total number of people who commuted for work in New Castle County and either lived in New Castle County or lived outside of New Castle County was 279,467. There were 64,752 people who worked in New Castle County, but lived outside of New Castle County. In percentage terms, 23.2 percent of New Castle County workers lived outside of the county. Of Delaware's three counties, New Castle had the highest percentage of people working in the county but living outside of the county. There was a net commuter flow of 20,654 more people coming to New Castle County for work than there were leaving New Castle County for work. Looking at the commuter flows within Delaware, there were 8,709 people who lived in Kent County and 1,433 who lived in Sussex County who traveled to New Castle for work, but the bulk of those coming to New Castle for work lived outside of the state. There were 15,112 people who lived in Chester County, Pennsylvania who worked in New Castle, followed by 12,282 people who lived in Cecil County, Maryland and 9,703 people who lived in Delaware County, Pennsylvania who worked in New Castle County.

Sussex County

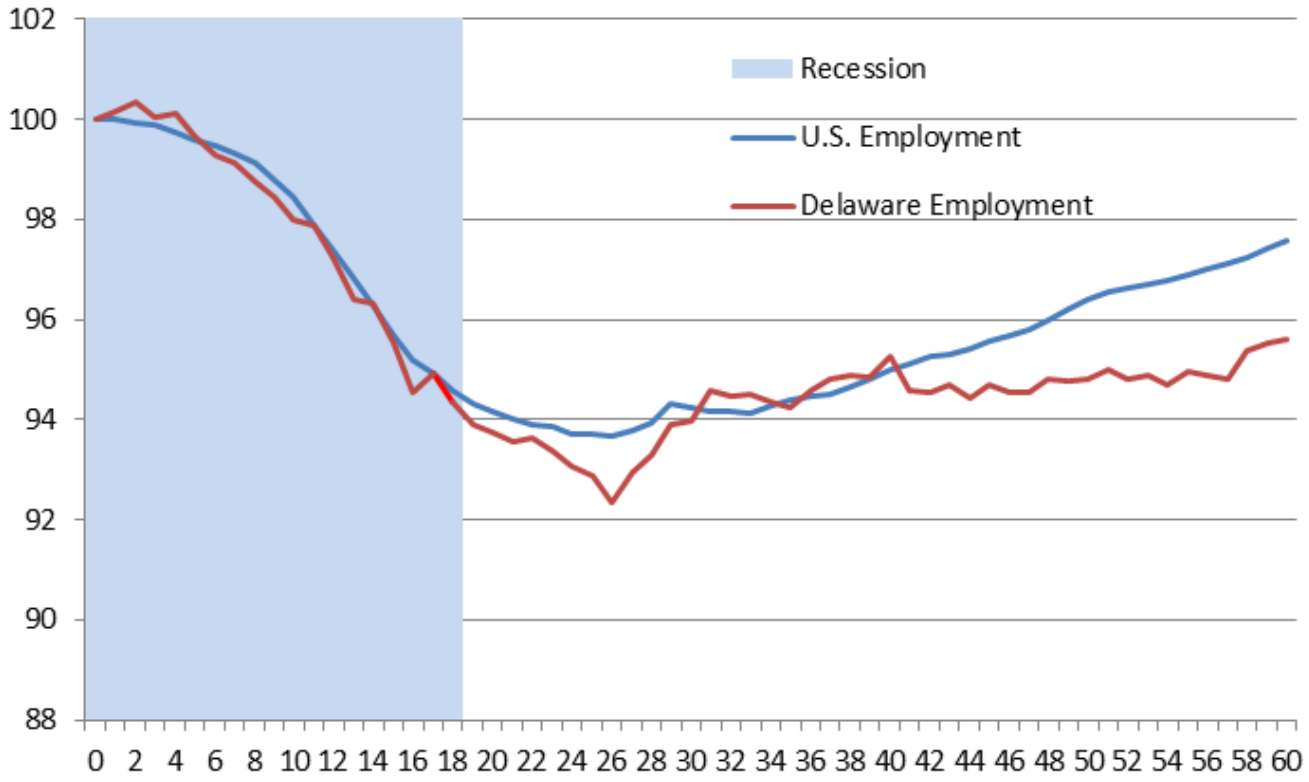
For Sussex County, the number of people that lived in Sussex and commuted for work in Sussex or outside of Sussex was 82,541. The number of people who lived in Sussex, but worked outside the county was 18,996. In percentage terms, 23 percent of workers living in Sussex worked outside the county. Kent County was the destination of 6,281Sussex County residents traveling outside of Sussex for work, while 1,433 commuted to New Castle. The two main destinations outside of Delaware for those living in Sussex County were Wicomico County, Maryland with 3,826 and Worcester County, Maryland with 2,364.

The total number of people working in Sussex County was 75,456. Of this number, 11,911 lived outside of Sussex County. The percentage of people who worked in Sussex County, but lived outside of the county was 15.8 percent. With 18,996 workers leaving the county and 11,911 people coming to Sussex for work, there was a net commuter flow of 7,085 fewer people coming to Sussex than leaving Sussex for work. Nearly half of all the people who commuted to Sussex County for work, but lived in a different county, lived in Kent County. There were 5,573 residents of Kent County working in Sussex. There were fewer New Castle County residents working in Sussex, with only 526 making the journey. Outside of Delaware, Wicomico and Worcester counties in Maryland had 2,496 and 1,565 residents, respectively, working in Sussex County.

Effects of the Recession

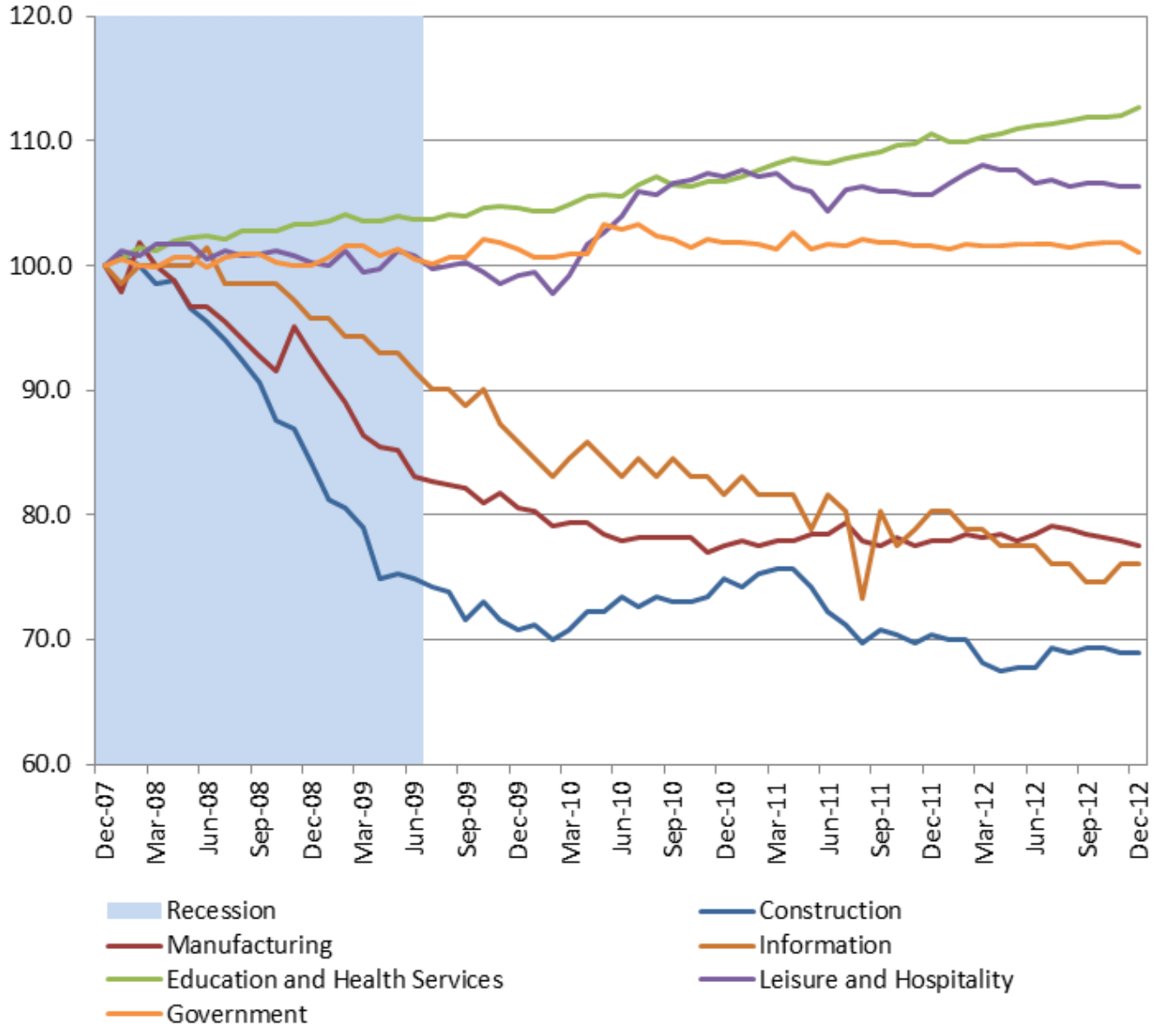
According to the Business Cycle Dating Committee in the National Bureau of Economic Research, the length of the recent recession was 18 months, lasting from December 2007 to June 2009. Even after the recession officially ended, employment continued to fall in Delaware and nationally for an additional 8 months, hitting a low point 26 months after the start of the recession. Just looking at the employment change from the beginning of the recession to end of the recession, employment was 5.6 percent lower in Delaware and 5.4 percent lower nationally. Of all 50 states, Delaware ranked 33rd (the higher ranking is better) in terms of change in employment during the recession. North Dakota ranked number 1 and Nevada ranked the worst, at 50. But as stated above, employment continued to fall for an additional 8 months, and by February 2010 employment was 7.6 percent lower in Delaware and 6.3 percent lower nationally than at the start of the recession. In December 2012, sixty months after the start of the recession, employment was 4.4 percent less in Delaware and 2.4 percent less nationally than when the recession began.

Total Nonfarm Employment Index: 60 Months after Beginning of Recession, US and Delaware



The Delaware industries with the greatest job gains sixty months after the beginning of the recession have been Education and Health Services (up 12.7 percent), Leisure and Hospitality (up 6.4 percent), and Government (up 1.1 percent). Those that fared the worst were Construction (down 31.1 percent), Information (down 23.9 percent), and Manufacturing (down 22.4 percent).

Index of select Delaware Industry Employment:
Three Best and Three Worst Performers Since Recession (Dec. 2007+100)



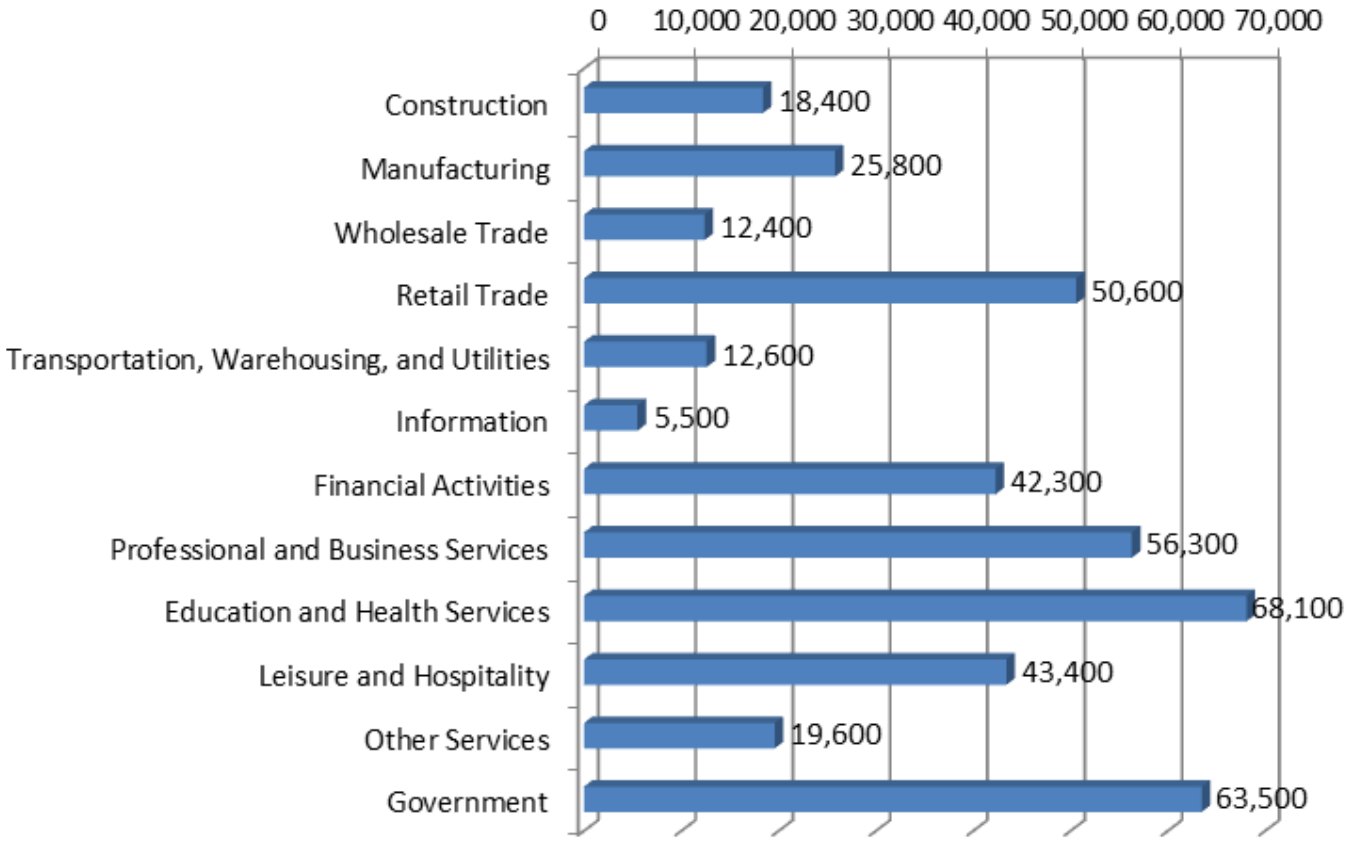
Current Employment Statistics – Delaware 2012

For 2012, the average monthly number of total nonfarm jobs in Delaware, as measured by Current Employment Statistics, was 418,500. Total nonfarm jobs increased by 1,100 from the 2011 average; this was the second consecutive year of job gains in Delaware. However, due to the severity of the great recession, Delaware's nonfarm jobs in 2012 were 20,400 below the 2007 employment level.

Delaware's largest supersector industry, Education and Health Services, is comprised of private education and the health and social assistance industries. There were 68,100 jobs in this industry in 2012. In addition to being the largest supersector industry, Education and Health Services was also the industry that created the greatest number of jobs in 2012, with 1,500 net new jobs created. Most of these jobs, 1,300, were in the Health Services sector.

Delaware's second largest supersector industry in 2012 was Government with 63,500 jobs. Government is comprised of federal, state, and local government, as well as state and local government schools. The over-the-year change in jobs from 2011 to 2012 for government was -200.

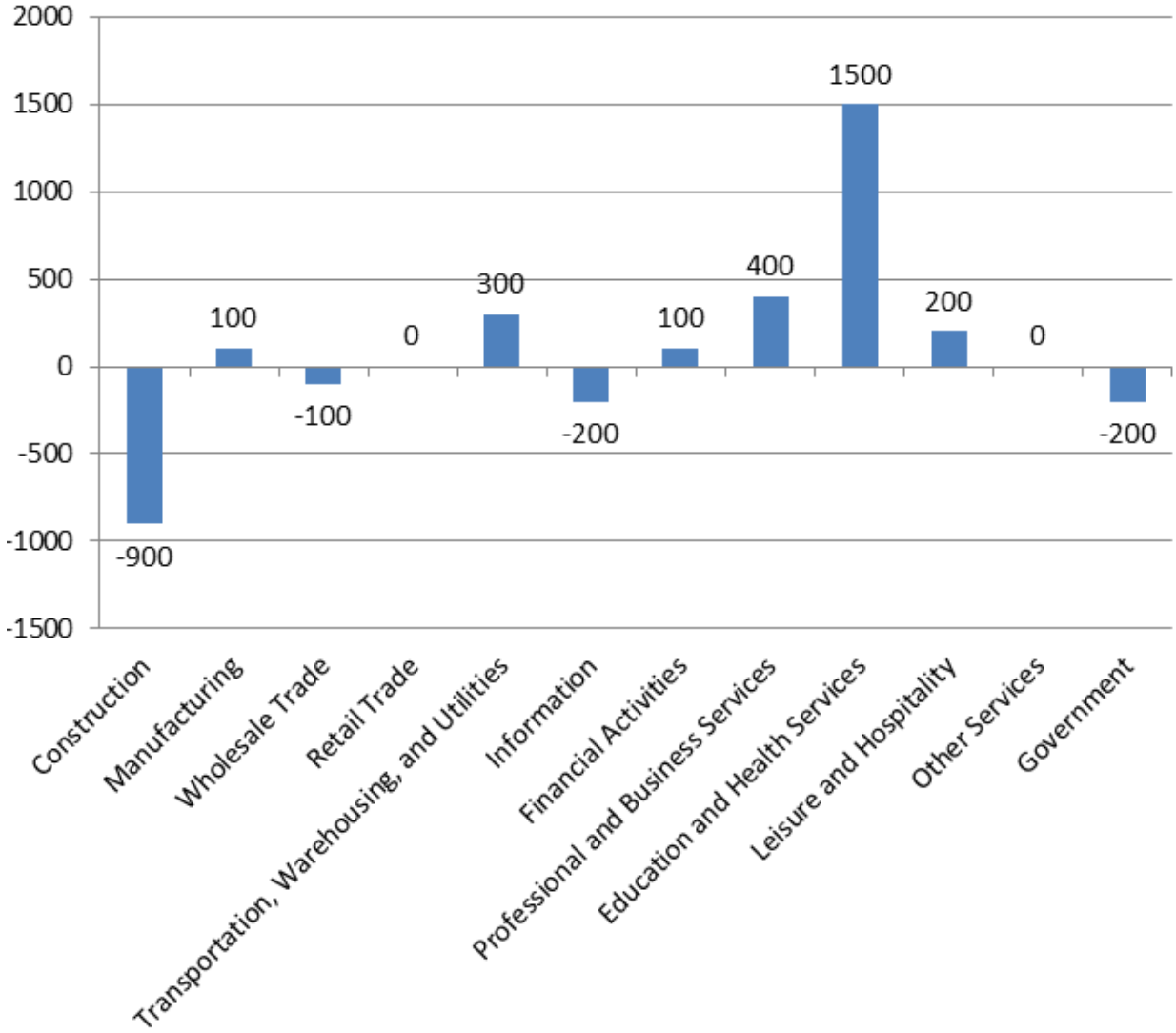
2012 CES Employment by Industry



Professional and Business Services was the third largest supersector in 2012, with 56,300 jobs in Delaware. This supersector is comprised of three major industries: Professional, Scientific, and Technical Services, Management of Companies and Enterprises, and Administrative and Waste Services. With an increase in 400 jobs over-the-year, Professional and Business Services had the second most net jobs gained in 2012.

The Construction industry, still suffering from the effects of the housing bust and the recession, lost the most net jobs in 2012. The industries with the next highest job losses were the Information industry and Government, with both losing 200 jobs. Two-thirds of the construction jobs lost in 2012 were in Specialty Trade Contractors, which lost 600 jobs, but this is about proportional to total number of these types of jobs in Construction.

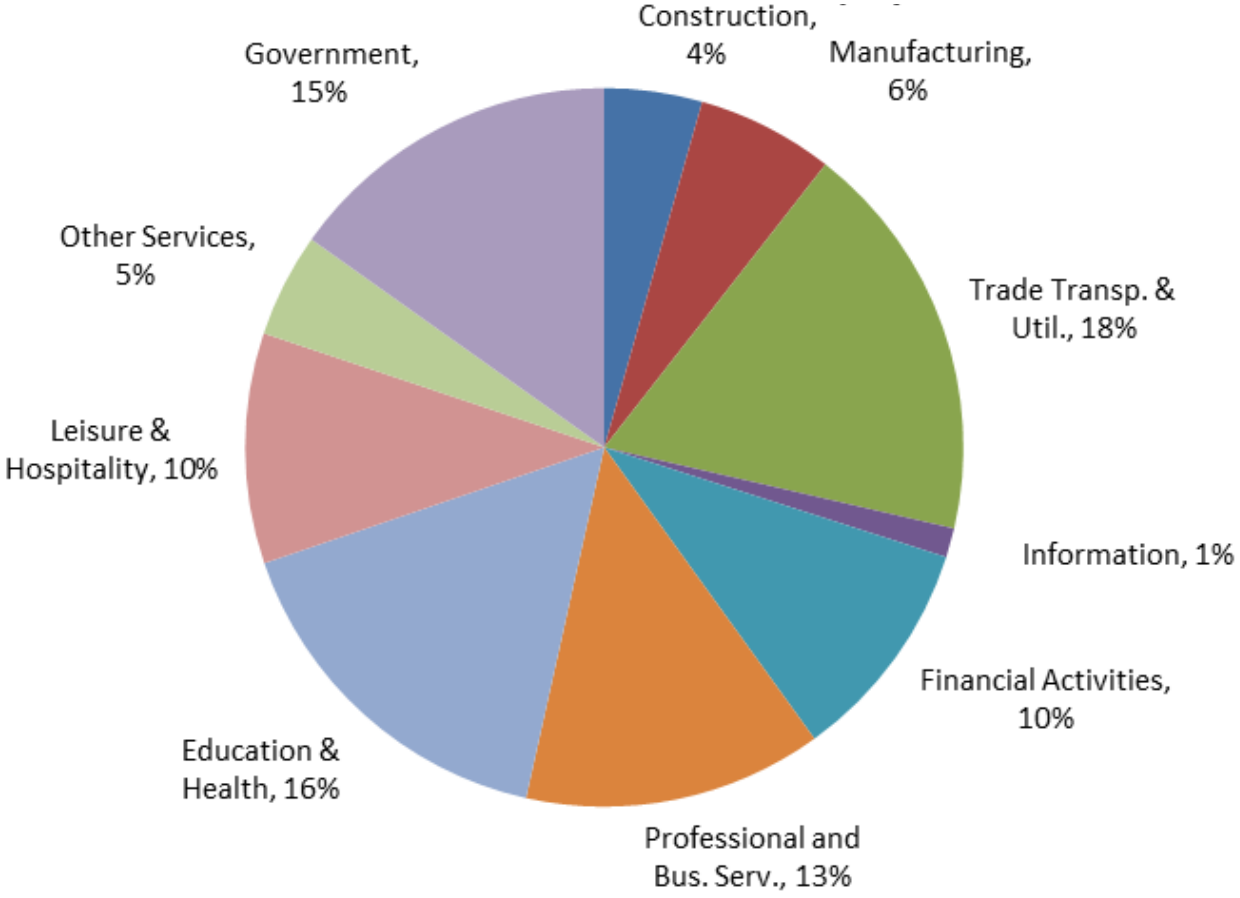
Change in CES Employment by Industry, 2011–2012



Percent Distribution of Nonfarm Employment and Income, 2012

In the pie chart below represents Delaware's average monthly nonfarm employment by industry for 2012. The percentage is calculated by taking each industry's annual average employment and dividing it by the total nonfarm employment. We can see that the largest industry supersector of employment is Trade, Transportation, and Utilities. This is comprised of the following industry sectors: Wholesale Trade, Retail Trade, and Transportation, Warehousing and Utilities. Trade, Transportation, and Utilities has 18 percent of all nonfarm employment in Delaware. The second-largest supersector in terms of nonfarm employment was Education and Health, which had 16% of all nonfarm employment. The Education portion of this supersector comprises only of private education. Public schools and universities are included in Government, which leads us to Government. At 15% of all nonfarm employment, this was the third largest supersector. Information, Construction, and Other Services were the three smallest sectors by amount of employment.

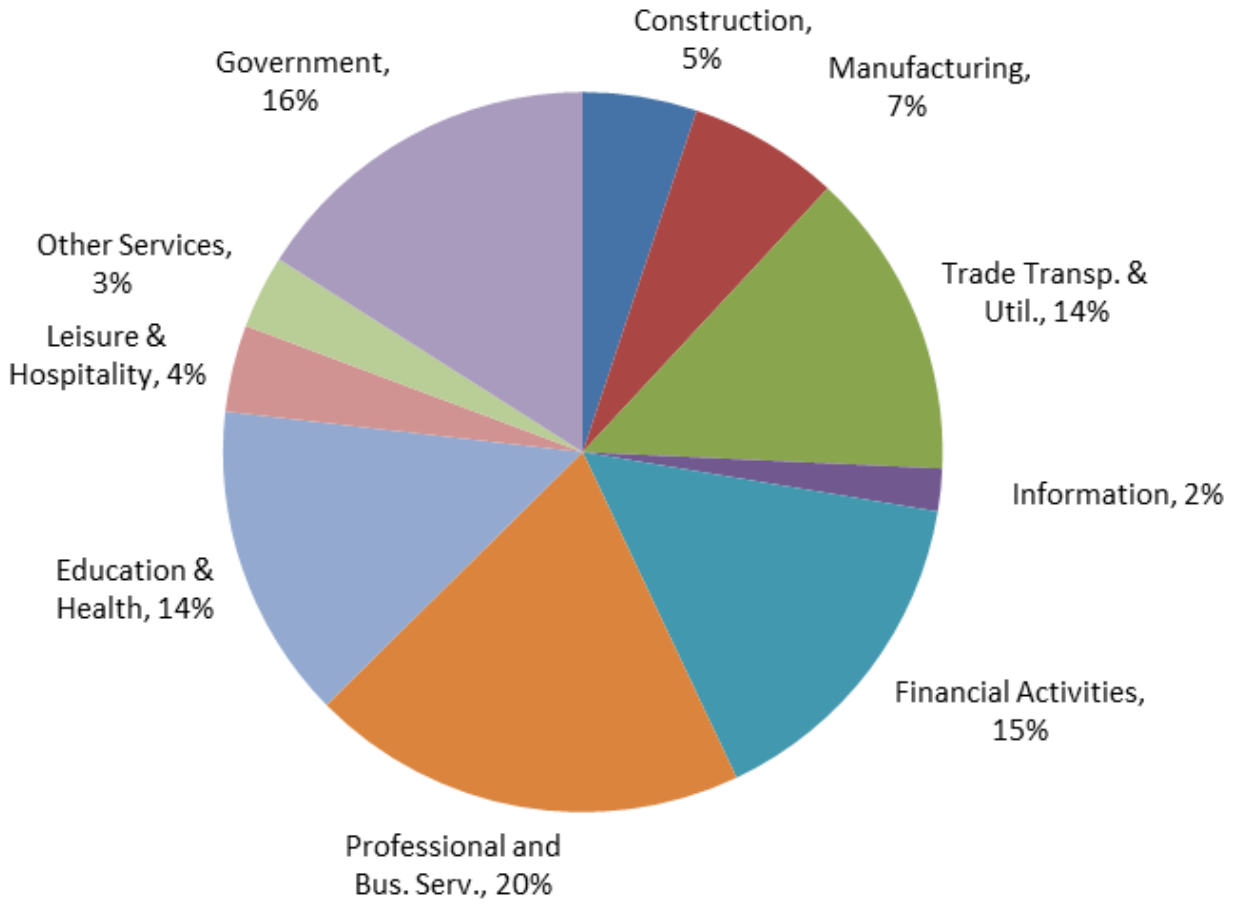
Percent Distribution of Delaware Nonfarm Employment, 2012



The next pie chart presents Delaware's nonfarm income by industry for 2012. These data come from the U.S. Department of Commerce's Bureau of Economic Analysis. The percentage distribution of income by industry was calculated by dividing the income earned in each industry by the total nonfarm earnings for Delaware. Comparing the distribution of nonfarm income pie chart to the distribution of nonfarm employment, one can see that they are in large part very similar. Those industry sectors that have a large distribution of employment also have a large distribution of income and small employment sectors have smaller income.

One notable difference between the two pie charts is in Professional and Business Services. Professional and Business Services, which ranked 4th in terms of employment with 13 percent of all nonfarm employment, ranked 1st in terms of the distribution of income with 20 percent of the total nonfarm income earned in Delaware for 2012. The Professional and Business Services supersector is comprised of three main industry sectors: Professional and Technical Services, Management of Companies and Enterprises, and Administrative and Waste Services. It includes many high paying occupations. Financial Activities ranked second in term of income, with 15 percent of total nonfarm income, but only ranked 6th in terms of employment with slightly less employment than Leisure & Hospitality. One other quite noticeable difference is in the Leisure and Hospitality supersector. This is comprised of the Art, Entertainment, and Recreation sector and the Accommodation and Food Services sector. Although it ranked 5th in terms of employment with 10 percent of all Delaware nonfarm employment for 2012, it only earned 4 percent of nonfarm income. Two reasons account for this: there are many low paying jobs in this sector of the economy, and a high proportion of the jobs are part-time; hence, the amount of income accruing to this sector is small relative to the proportion of employment.

Percent Distribution of Delaware Nonfarm Income, 2012



Business Employment Dynamics

Business Employment Dynamics (BED) measures the gross job gains and gross job losses from each quarter in the economy. 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 between the amount of gross job gains and gross job losses. Each quarter the net change in jobs is typically dwarfed by the gross job gains and losses.

Even during expansions there are gross job losses, and even during recessions there are gross job gains. However, during a recession gross job losses typically outweigh the gross job gains, creating a net job loss, and during an economic boom gross job gains will outweigh the gross job losses, creating a net gain. For example, from the 1st to the 4th quarter of 2001, 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. This pattern was repeated during the last recession, 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.

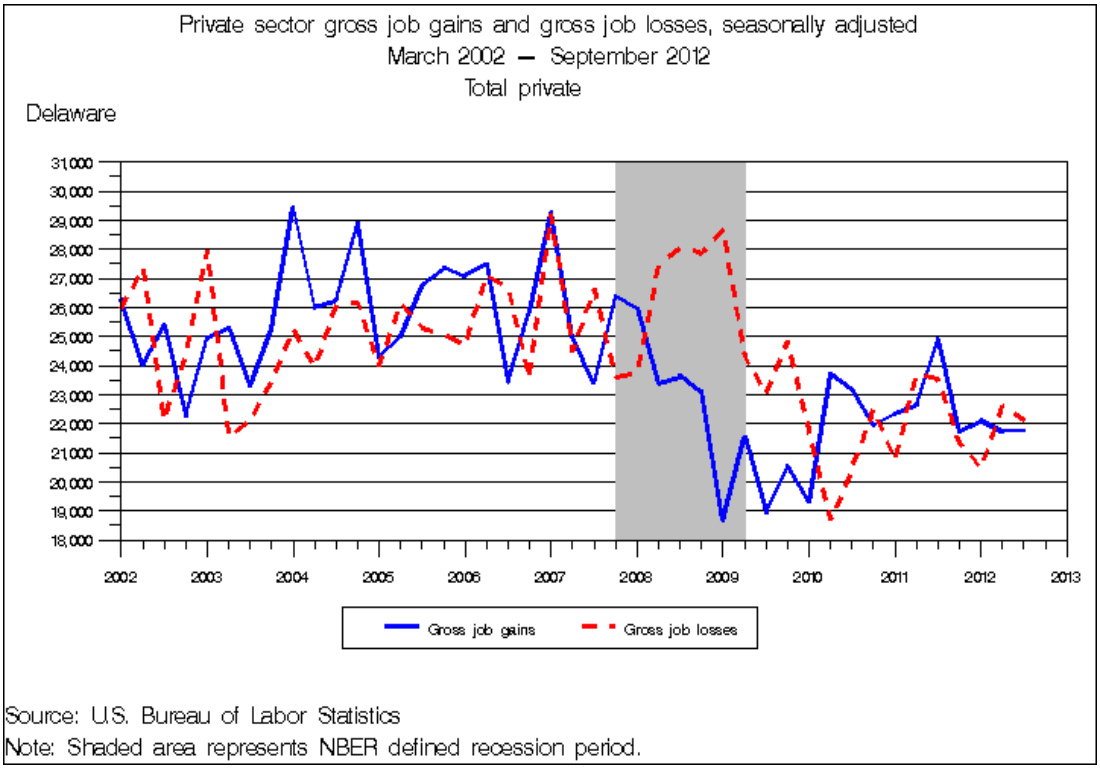
BED also measures the number of establishments with gross job gains at either expanding or opening establishments and the number of establishments with gross job losses at either contracting or closing establishments. An establishment is defined as an economic unit that produces goods or services, while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

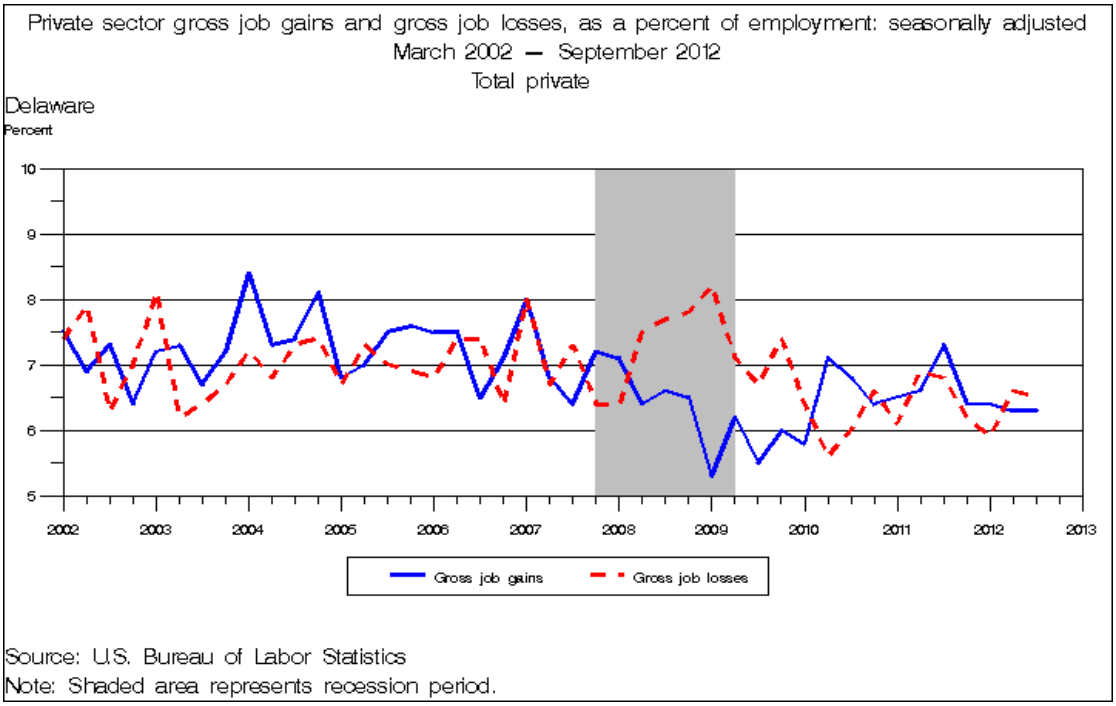
The number of establishments with gross job gains either from expanding or opening establishments typically exceeds the number of establishments with gross job losses from either contracting or closing establishments during an economic expansion. On the other hand, the opposite is generally true during 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 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 – 3rd Quarter, 2012

From June to September 2012, Delaware's gross job gains from opening and expanding establishments was 21,771, and the number of job losses from closing and contracting establishments was 22,138, 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 -367.


Private sector gross job gains and gross job losses, seasonally adjusted
March 2002 — September 2012
Total private
Delaware
31,000
30,000
29,000
28,000
27,000
26,000
25,000
24,000
23,000
22,000
21,000
20,000
19,000
18,000
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
Gross job gains
Gross job losses
Source: U.S. Bureau of Labor Statistics
Note: Shaded area represents NBER defined recession period.


Private sector gross job gains and gross job losses, as a percent of employment: seasonally adjusted
March 2002 — September 2012
Total private
Delaware
Percent
10
9
8
7
6
5
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
Gross job gains
Gross job losses
Source: U.S. Bureau of Labor Statistics
Note: Shaded area represents recession period.

Trends in Gross Job Gains and Job Losses

Gross job gains in the third quarter of 2012 at opening and expanding private sector business establishments in Delaware were up by 19 from the second quarter of 2012. Over the quarter, expanding establishments added 17,612 jobs, while opening establishments added 4,159. Gross job gains were larger than in the previous quarter at expanding establishments (+448) and smaller than the previous quarter at opening establishments (-429).

Gross job losses totaled 22,138 in the third quarter of 2012, down by 472 from the second quarter. In the third quarter of 2012, contracting establishments lost 16,456 jobs, while closing establishments accounted for a loss of 5,682 jobs. Gross job losses were smaller than in the previous quarter at contracting establishments (-999) and larger than the previous quarter at closing establishments (527).

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

Category	3 months ended				
	Sept. 2011	Dec. 2011	Mar. 2012	June 2012	Sept. 2012
	Levels				
Gross job gains	24,900	21,735	22,107	21,752	21,771
At expanding establishments	19,689	16,714	17,546	17,164	17,612
At opening establishments	5,211	5,021	4,561	4,588	4,159
Gross job losses	23,534	21,334	20,468	22,610	22,138
At contracting establishments	18,592	17,302	16,175	17,455	16,456
At closing establishments	4,942	4,032	4,293	5,155	5,682
Net employment change*	1,366	401	1,639	-858	-367

* 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 June to September 2012, Delaware's gross job gains represented 6.3 percent of private sector employment. This was slightly higher than the national rate of gross job gains of 6.2 percent. Over the quarter, Delaware's gross job gains at expanding establishments represented 5.1 percent of private sector employment, and gross job gains at opening establishments represented 1.2 percent. Nationally this quarter, gross job gains at expanding establishment represented 5.0 percent of private sector employment, and at opening establishments represented 1.2 percent.

From June to September 2012, Delaware's gross job losses represented 6.5 percent of private sector employment. This was higher than the national rate of gross job losses of 6.0 percent. Delaware's gross job losses at contracting establishments represented 4.8 percent of private sector employment, which was slightly lower than the national rate at contracting establishments of 4.9 percent. The rate of gross job losses at closing establishments was 1.7 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				
	Sept. 2011	Dec. 2011	Mar. 2012	June 2012	Sept. 2012
Total Private for State of Delaware	**Rates (percent)**				
Gross job gains	7.3	6.4	6.4	6.3	6.3
At expanding establishments	5.8	4.9	5.1	5.0	5.1
At opening establishments	1.5	1.5	1.3	1.3	1.2
Gross job losses	6.8	6.2	5.9	6.6	6.5
At contracting establishments	5.4	5	4.7	5.1	4.8
At closing establishments	1.4	1.2	1.2	1.5	1.7
Net employment change*	0.5	0.2	0.5	-0.3	-0.2
Total Private for U.S. as a whole	**Rates (percent)**				
Gross job gains	6.7	6.3	6.3	6.3	6.2
At expanding establishments	5.4	5.1	5.2	5.2	5.0
At opening establishments	1.3	1.2	1.1	1.1	1.2
Gross job losses	5.9	6.0	5.6	5.8	6.0
At contracting establishments	4.8	4.8	4.5	4.7	4.9
At closing establishments	1.1	1.2	1.1	1.1	1.1
Net employment change*	0.8	0.3	0.7	0.5	0.2

* 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 27,214 active private sector establishments, a total of 5,429 establishments gained jobs from June to September 2012. (See table C.) Of these, 4,239 were expanding establishments and 1,190 were opening establishments.

During the third quarter of 2012, 5,716 establishments lost jobs. Of these, 4,514 were contracting establishments and 1,202 were closing establishments. The statistics from tables A and C indicate that the average expanding establishment added 4.2 jobs during the quarter and the average contracting establishment lost 3.6 jobs during the quarter.

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

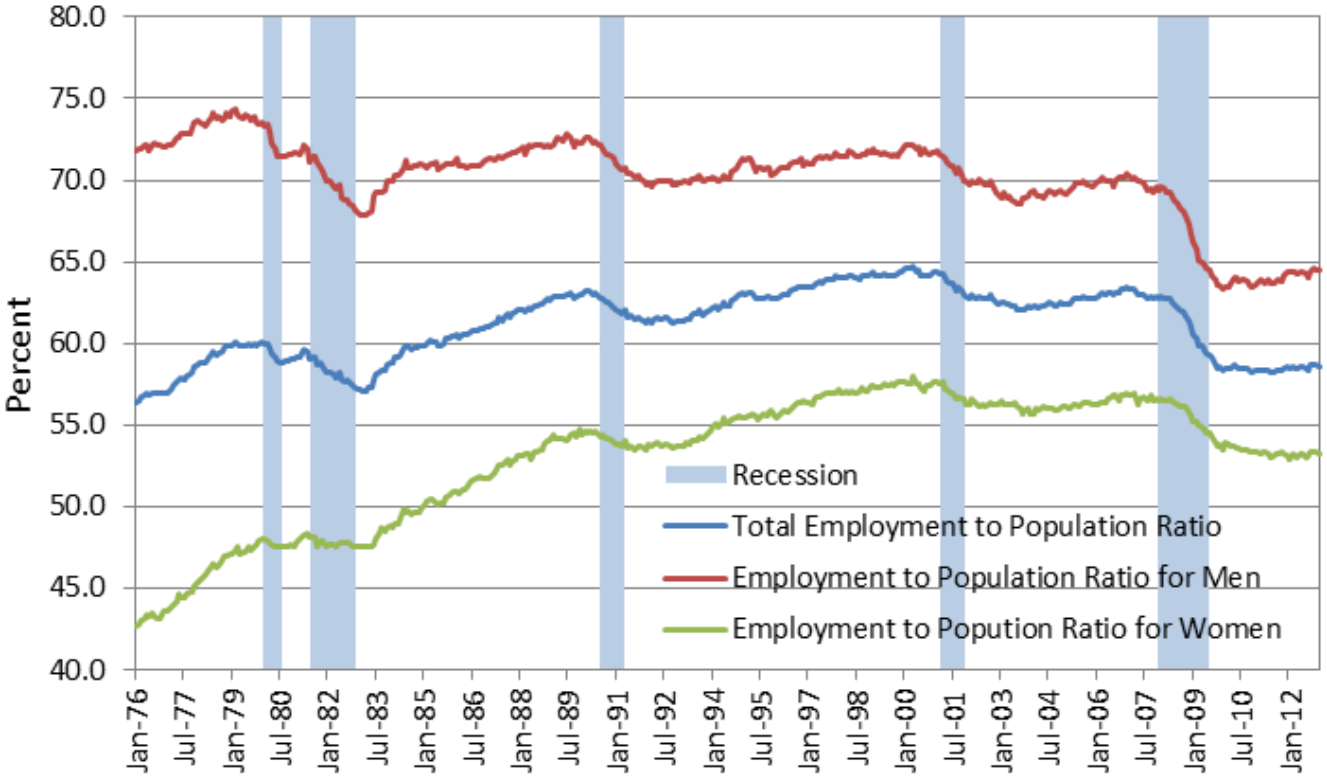
Category	3 months ended				
	Sept. 2011	Dec. 2011	Mar. 2012	June 2012	Sept. 2012
Establishments gaining jobs.....	5,731	5,643	5,808	5,503	5,429
Expanding establishments.....	4,341	4,316	4,551	4,331	4,239
Opening establishments.....	1,390	1,327	1,257	1,172	1,190
Establishments losing jobs.....	5,804	5,614	5,586	5,671	5,716
Contracting establishments.....	4,321	4,337	4,289	4,444	4,514
Closing establishments.....	1,483	1,277	1,297	1,227	1,202
Net establishment change*.....	-93	50	-40	-55	-12

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

The Employment to Population Ratio

The employment to population ratio is the proportion of the employed to the civilian non-institutional population 16 years of age and older. The employment to population ratio, which is sometime referred to as the employment rate, has a cyclical component and a trend component. The cyclical component is due to the business cycle. During economic booms the employment to population ratio tends to increase as businesses are hiring people at a rate faster than the population is growing. During economic downturns or recessions the employment to population ratio tends to decrease because firms are laying off people and employment is declining. But in addition to the cyclical component, there is also a long term trend or structural component to the employment to population ratio that can last for decades. From the end of WWII until the year 2000, there had been an upward trend to the employment to population ratio in the U.S. One of the reasons behind this long-term trend was more women entering the workforce and finding employment. The employment to population ratio fell for men, but not enough to offset the gain for women. Also, the first of the baby boom generation, those born between 1946 and 1964, increased the overall employment rate as they have entered their "prime" working age (between 25 and 54 years old) in the 1970s

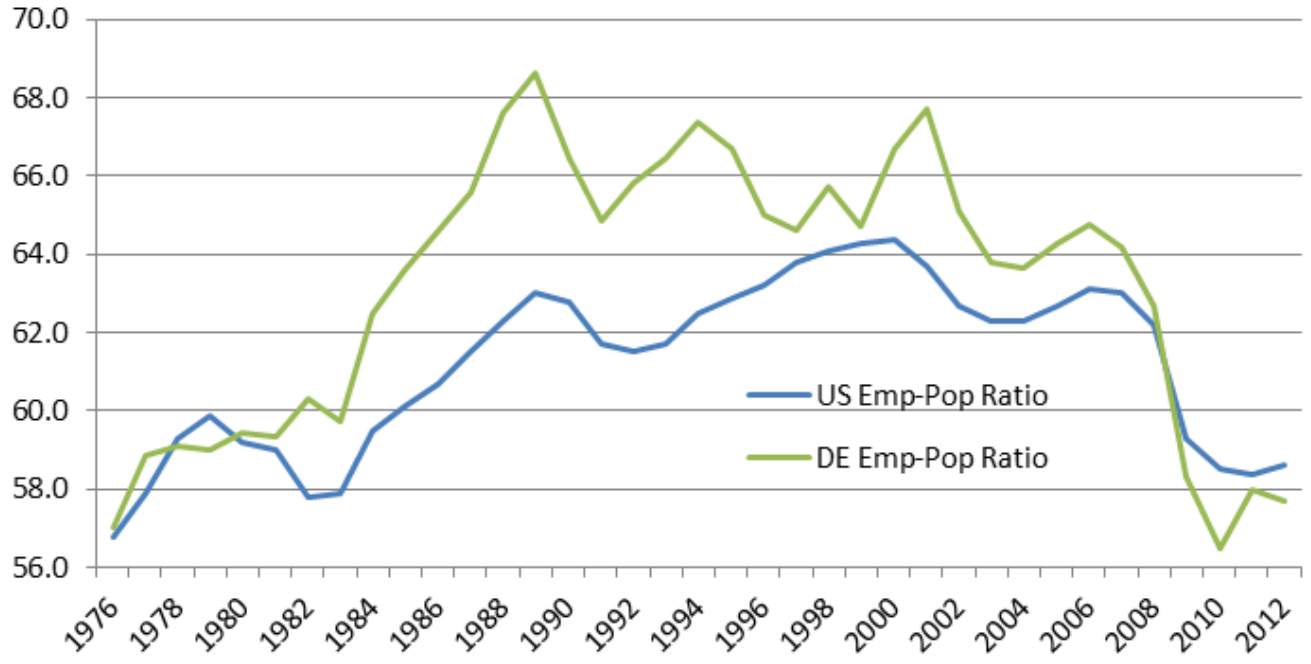
U.S. Employment to Population Ratio



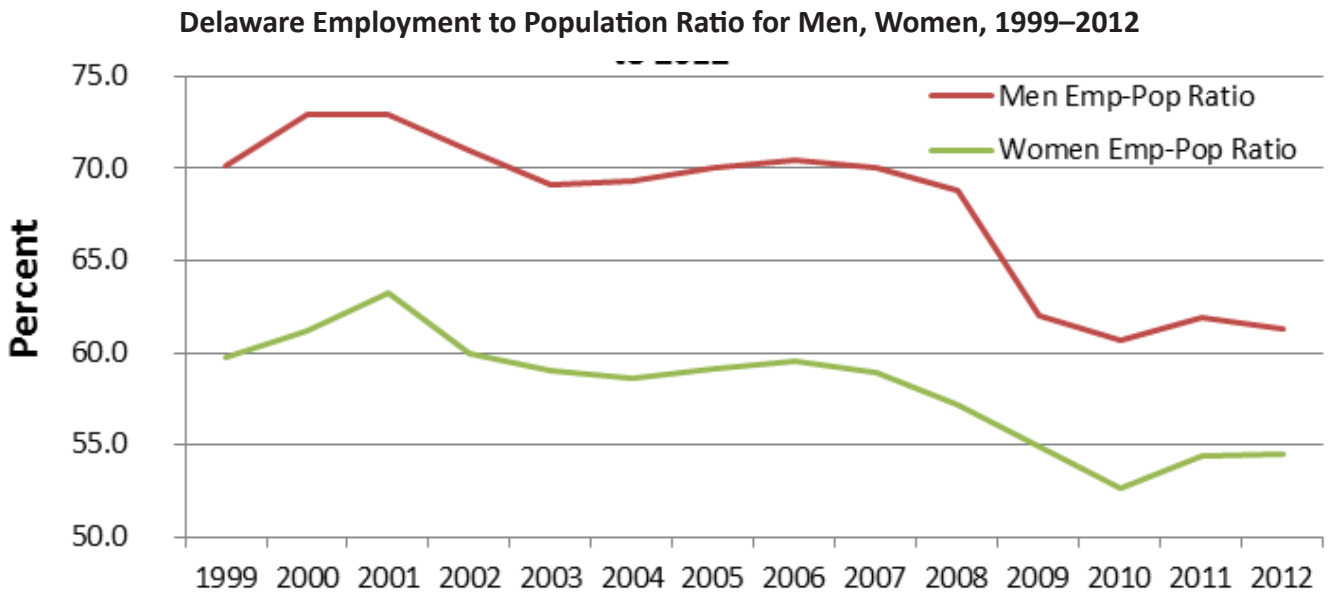
Since 2000, the employment to population ratio has been declining. Part of the reason for the decline has been the same factors that caused the increase in the employment rate, reversed. The first of baby-boom generation (those born in 1946) left the prime working age after 2000. People in their prime working age, 25 to 54 years old, are employed at a rate of about 80 per 100 in this age group. Those in the 55 to 64 age group are employed at a rate of about 60 per 100. So as the baby-boom generation has moved out of the prime working age, this has had a downward pull on the employment rate. Also, the employment rate for women peaked around the year 2000 and has also begun to decline, so it is no longer compensating for the long-term decline in the male employment rate. But in addition to the long-term demographic trends just mentioned, the cyclical component of economic recovery after a recession has not been as strong for employment growth in the 2000s as it has been in the past.

The graph below shows Delaware's employment to population ratio versus that of the nation from 1976 to 2012. In 1976, Delaware and the U.S. had nearly identical employment to population ratios. Starting in the early 1980s, Delaware's employment to population ratio began to surpass the US ratio. By 1989, Delaware's employment to population ratio had peaked, led by employment growth in such industries as Finance, Insurance, and Real Estate (FIRE), Services, and Construction. Banking, for example, had tremendous growth from 1981 to 1989, with employment growing by over 300 percent. From the early 1980s through 2008 Delaware's employment rate exceeded the nation's, but since the last recession, Delaware has been below the national average. Delaware's employment to population ratio in 2012 was 57.7 percent, which put Delaware below the national average of 63.7 percent. North Dakota had the highest employment to population ratio in the nation, and West Virginia the lowest, at 70.3 percent and 50.3 percent, respectively.

Delaware and U.S. Employment to Population Ratio, 1976–2012

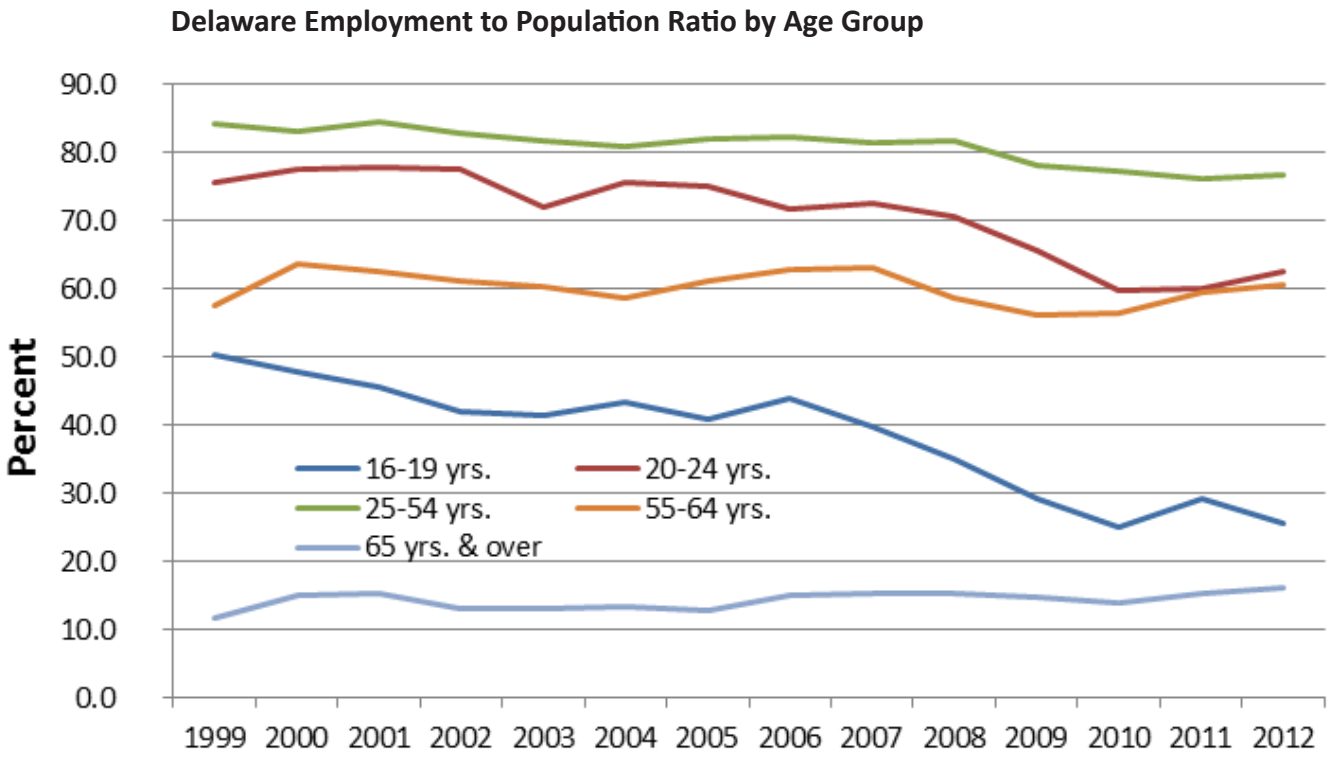


Since 2001, there has been a decline in the employment to population ratio for both men and women. During the last recession Delaware had a particularly steep decline in the employment to population ratio, falling from 62.7 percent in 2008 to 58.3 percent in 2009, a drop of 4.4 percentage points. Two industries that were hit particularly hard during the recession were Construction and Manufacturing, which traditionally have been male dominated industries. The employment to population ratio for men fell by 6.8 percentage points from 2008 to 2009. For women the ratio fell much less, declining by 2.3 percentage points. The reduction in the male employment rate is the major cause for the decline in the overall employment to population ratio for 2009.

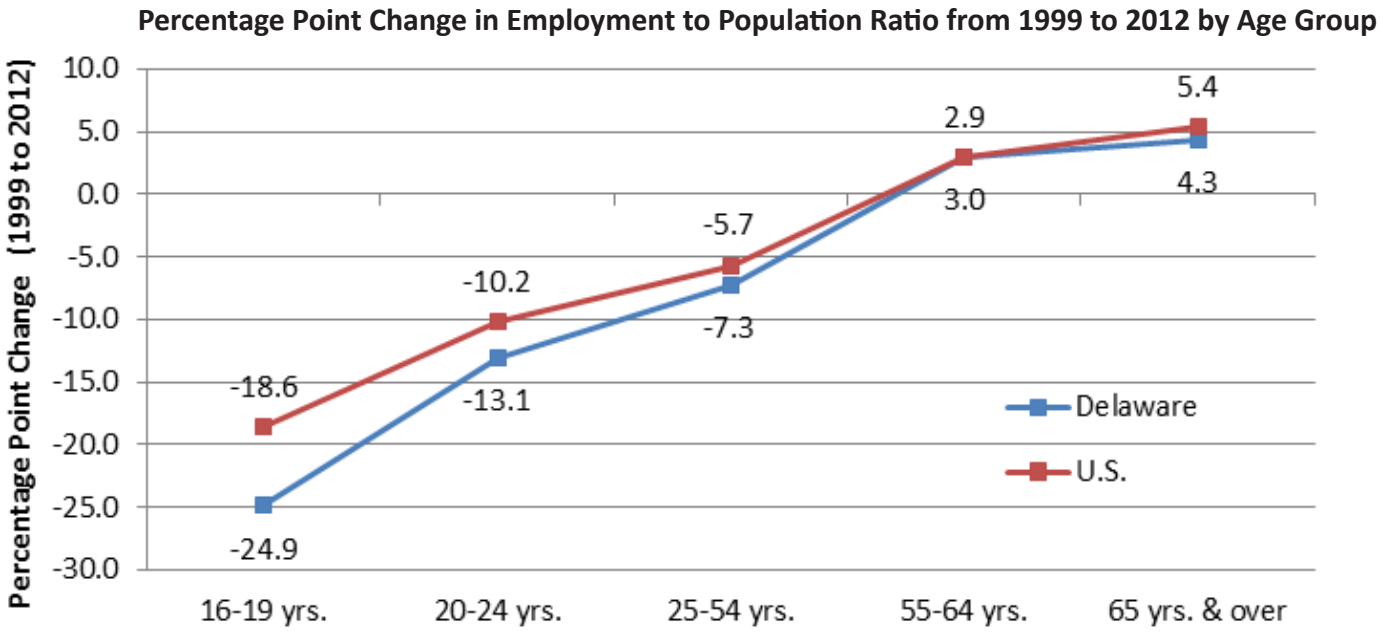


The employment rate for teenagers has fallen greatly from 50.4 percent in 1999 to 25.5 percent in 2012. Whereas in 1999 about 50 out of every 100 teenagers were employed, that the number has fallen to about 26 out of every 100 in 2012. The U.S. teenage employment rate has declined about the same amount as Delaware's, falling from 44.7 percent in 1999 to 26.1 percent in 2012. Delaware's teenage employment rate was higher in 1999 and slightly lower in 2012 than the national teenage employment rate. Much of this decline was because more teenagers were enrolling in college, taking unpaid internships, and doing volunteer work. Higher paying jobs on average require more education and skills than lower paying jobs. Therefore, many teens were making the decision to pursue educational opportunities and internships in order to increase their earning potential.

Another interesting development since 1999 has been that the difference in the employment rate between the 20 to 24 year old group and the 55 to 64 year old group has nearly disappeared. This development is as true nationwide as it is for Delaware. Most of the narrowing of the gap is due to the decline in the employment rate for the 20 to 24 year olds, in part due to the increasing educational enrollment rate for 20 to 24 year olds. In Delaware, the difference in the employment rate between 20 to 24 year olds and 55 to 64 year olds was 17.9 percent points in 1999. In 2012, the gap was down to only 1.8 percentage points. The employment rate for 20-24 year olds has fallen from about 75.6 percent in 1999 to almost 62.5 percent in 2012. At the same time, there has been an increase in the employment rate for 55 to 64 year olds from 57.7 percent in 1999 to 60.7 percent in 2012. For the US, the difference in the employment rate between 20 to 24 year old and 55 to 64 year olds was 14.0 percent points in 1999; in 2012 this was down to only 0.9 percentage points. The US employment rate for 20-24 year old has fallen from about 72 out every 100 working in 1999 to almost 62 out of every 100 working in 2012. At the same time there has been a slight increase in the U.S. employment rate for 55 to 64 year olds.



The employment rate of workers who are in what is considered the "prime" working age, those from 25 to 54, has dropped modestly since 1999. Workers 55 to 64 years old and those 65 and older have seen a modest increase in their employment rates since 1999. The graph below shows that in Delaware, out of every 100 teenagers aged 16 to 19, there were 24.9 fewer employed in 2012 than in 1999. For those in their prime working years, 25 to 54 years of age, there were 7.3 fewer employed in Delaware, and 5.7 fewer employed in the US out of every 100 people in those age groups.



City of Wilmington Employment and Wages

Wilmington is the largest city in Delaware, with an estimated population of 71,300. Despite it being Delaware's largest city, there is no 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 Wilmington 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 Wilmington. There are approximately 2,000 business establishments within the Wilmington city limits. New Castle County, by comparison, has over 17,000 business establishments, and there are approximately 28,000 business establishments statewide. The table below contains detailed industry employment data for the month of December for the years 2007 to 2012. The wage data are quarterly totals for the 4th quarter of 2007 through 2012. An asterisk (*) represents data that cannot be released due to employer confidentiality restrictions.

In December, 2007 Wilmington had 54,488 jobs and total wages for the 4th quarter of about $865 million. The largest industry in terms of employment was Finance and Insurance with 11,618 jobs. One out of every five jobs in the city was in Finance and Insurance; it was one and a half times larger than the next largest industry, Professional and Technical Services, with 7,624 jobs. Health Care and Social Assistance was the third largest industry, with 6,141 jobs, followed by Administrative and Waste Services and State Government, with 4,975 and 4,728 jobs, respectively. In terms of wages by industry, the Finance and Insurance industry earned the most pay with $271 million. Not far behind in wages was the Professional and Technical Services industry with nearly $225 million in pay. These two industries combined made up 57 percent of all Wilmington wages.

Unless otherwise noted, in the remaining sections employment comparisons are over-the-year December to December change and wage data comparisons are the change in wages in the 4th quarter from the 4th quarter of the prior year. In 2008, Wilmington employment fell by 3,150 jobs to 51,338, a reduction of 5.8 percent. The recession beginning in December 2007 had a greater impact on the City of Wilmington than on New Castle County as a whole. New Castle County employment only fell 2.9 percent in 2008. Employment declines in Wilmington were particularly large in Administrative and Waste Services (-913), Professional and Technical Services (-503), and Management of Companies and Enterprises (-338). Together these three industries accounted for over 55 percent of the job losses in 2008. Despite the 13.5 percent employment decline in Management of Companies and Enterprises, this industry had an increase in quarterly wages of almost $43 million. Management of Companies and Enterprises, together with Finance and Insurance, was a large reason why Wilmington wages increased by $46 million to $911 million at the same time employment fell in 2008. Other industries with significant job losses were Finance and Insurance (-272), Health Care and Social Assistance (-255), Retail Trade (-254), Construction (-207), and Federal Government (-244).

In 2009, Wilmington employment fell 1,230 to 50,108 jobs, a reduction of 2.4 percent. New Castle County employment fell by 5.4 percent over the same time. Although Wilmington employment fell less than New Castle County, the total change in employment from December 2007 to December 2009 was about the same for both, with Wilmington employment falling 8.0 percent and New Castle County employment falling 8.1 percent. Over-the-year job losses were greatest in the city in the Construction industry with an employment decline of -380, a loss of 27%. Construction industry losses in New Castle County during the same time period were 18 percent. Professional and Technical Services, Administrative and Waste Services, and Management of Companies and Enterprises also had large employment declines, with each losing over 250 jobs. Health Care and Social Assistance and Finance and Insurance each had gains in employment of 223 and 130 jobs, respectively. Wages in Management of Companies and Enterprise returned to the 2007 level with a decrease in wages of $42 million. Finance and Insurance industry wages fell by $28 million, giving up more than was gained in 2008 and putting them below the 2007 level. These two industries combined made up most of the Wilmington wage decline of $70.6 million (7.7 percent) leaving total Wilmington wages at $840.8 million.

Wilmington employment for 2010 saw an increase in of 466 jobs, a gain of 0.9 percent. Total Wilmington employment grew to 50,574 jobs. At the same time, New Castle County employment increased by 0.5 percent. In 2010, Finance and Insurance still remained as the largest industry in Wilmington, with 11,529 jobs. The Finance and Insurance industry's share of total employment increased from 21 percent of all jobs in 2007 to nearly 23 percent in 2010. Profession and Technical Services was the second largest industry with 7,174 jobs, followed by Health Care and Social Assistance with 6,457 jobs. Health Care and Social Assistance had the most jobs gained, increasing by 348 jobs. This industry was followed by Professional and Technical Services with 337 jobs and Administrative and Waste Services with 270 jobs. Management of Companies and Enterprises was the biggest job loser with 244 jobs lost. Other job losers in 2010 were Wholesale Trade, with -188 jobs, Accommodation and Food Services, with -167 jobs, and Manufacturing, with -127 jobs. Wilmington wages increased by $68 million, driven in large part by gains in Professional and Technical Services, up $41 million, and Finance and Insurance, up nearly $24 million. A few industries, such as Construction, Wholesale Trade, and Manufacturing, saw significant wage reductions.

Wilmington had a second consecutive year of employment gains in December 2011 with 1,071 net new jobs. In percentage terms, this was a 2.1 percent gain in employment and was better than New Castle County job gains of 1.3 percent. Total Wilmington employment was 51,645 by December 2011. Professional and Technical Services led the way in job creation, with 438 net new jobs, followed by Accommodation and Food Services, with 360 jobs, and Construction, with 355 jobs. There were a few industries with job losses, with the biggest decline in Finance and Insurance, where 455 jobs were lost. Retail Trade and Other Services were two industries that lost a little over 100 jobs each. Total Wilmington wages increased by almost $10 million to $919 million, a 1 percent increase. The industries with the biggest changes in wages were Management of Companies and Enterprises, with a $20.8 million increase, and Finance and Insurance, with a $27.8 million decrease.

There was a third consecutive year of job gains in Wilmington in 2012. Employment increased by 1,503 net new jobs to 53,148, an increase of 3.5 percent. Employment in New Castle County as a whole only grew by 0.7 percent during this time. Although the Finance and Insurance industry's relative share of employment fell slightly to just over 20 percent of all Wilmington jobs, it remained the largest industry with 10,718 jobs. Professional and Technical Services was the second largest industry, with 7,335 jobs, followed by Health Care and Social Assistance, with 6,731, and State Government, with 4,894 jobs. Employment growth was spread across many industries in the Wilmington economy with the greatest growth in Retail Trade, where there were 473 net new jobs. Next was Administrative and Waste Services, with 356 new jobs, and Construction, with 338 new jobs. Despite the overall job growth, there were still some industries with job losses, such as Finance and Insurance, with a decline of 356 jobs, Professional and Technical Services, with 277 fewer jobs, and Local Government with 245 fewer jobs. There were significant wage gains in Wilmington of nearly $176 million, putting total wages at $1.095 billion. The one industry most responsible for gains in wages was Professional and Technical Services, with an increase of $126 million. The next largest wage gain was a $10 million increase in Management of Companies and Enterprises.

Wilmington Employment and Wages by Industry

		Dec-07		Dec-08		Dec-09		Dec-10		Dec-11		Dec-12	
	NAICS code	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages
	Total	**54,488**	**864,969,322**	**51,338**	**911,432,282**	**50,108**	**840,843,643**	**50,574**	**909,518,242**	**51,645**	**919,246,863**	**53,148**	**1,095,078,094**
Agriculture, forestry, fishing and hunting	**11**	*	*	*	*	*	*	*	*	*	*	*	*
Mining	**21**	*	*	*	*	*	*	*	*	*	*	*	*
Utilities	**22**	*	*	*	*	*	*	*	*	*	*	*	*
Construction	**23**	**1,629**	**27,093,862**	**1,422**	**30,962,820**	**1,042**	**19,921,998**	**1,049**	**16,626,316**	**1,404**	**21,540,885**	**1,742**	**27,507,593**
Construction of Buildings	236	552	7,558,866	444	5,907,210	425	5,677,319	405	5,783,977	430	5,804,656	625	9,727,358
Heavy and Civil Engineering Construction	237	166	2,501,672	184	2,871,551	54	1,236,094	52	1,037,452	174	2,732,636	109	1,811,436
Specialty Trade Contractors	238	911	17,033,324	794	22,184,059	563	13,008,585	592	9,804,887	800	13,003,593	1,008	15,968,799
Manufacturing	**31-33**	**1,004**	**15,212,233**	**948**	**14,693,590**	**903**	**14,277,111**	**776**	**11,578,037**	**791**	**12,286,471**	**920**	**14,253,011**
Food Manufacturing	311	34	161,894	34	155,768	47	214,364	*	*	54	598,937	*	*
Beverage and Tobacco Product Manufacturing	312	0	0	0	0	*	*	*	*	*	*	*	*
Textile Mills	313	0	0	0	0	0	0	0	0	0	0	0	0
Textile Product Mills	314	*	*	*	*	*	*	*	*	*	*	*	*
Apparel Manufacturing	315	0	0	0	0	0	0	0	0	0	0	0	0
Leather and Allied Product Manufacturing	316	0	0	0	0	0	0	0	0	0	0	0	0
Wood Product Manufacturing	321	0	0	0	0	0	0	0	0	0	0	*	*
Paper Manufacturing	322	*	*	*	*	*	*	*	*	*	*	*	*
Printing and Related Support Activities	323	185	2,455,373	182	2,687,372	155	2,105,335	158	2,229,088	179	2,217,896	232	2,875,289
Petroleum and Coal Products Manufacturing	324	*	*	*	*	0	0	0	0	0	0	*	*
Chemical Manufacturing	325	224	5,207,951	200	4,580,109	195	4,358,474	169	3,542,534	108	3,590,772	192	4,001,916

Wilmington Employment and Wages by Industry

		Dec-07		Dec-08		Dec-09		Dec-10		Dec-11		Dec-12	
	NAICS code	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages
Plastics and Rubber Products Manufacturing	326	0	0	0	0	0	0	0	0	0	0	0	0
Nonmetallic Mineral Product Manufacturing	327	13	165,408	*	*	*	*	*	*	*	*	101	1,325,381
Primary Metal Manufacturing	331	*	*	*	*	*	*	*	*	*	*	*	*
Fabricated Metal Product Manufacturing	332	272	3,914,437	296	4,353,962	222	4,044,556	134	2,084,542	225	3,165,231	175	2,450,141
Machinery Manufacturing	333	9	94,091	7	97,660	*	*	*	*	*	*	*	*
Computer and Electronic Product Manufacturing	334	*	*	*	*	*	*	*	*	*	*	*	*
Electrical Equipment, Appliance, and Component Manufacturing	335	0	0	0	0	0	0	0	0	0	0	0	0
Transportation Equipment Manufacturing	336	29	482,654	25	469,362	*	*	*	*	*	*	*	*
Furniture and Related Product Manufacturing	337	38	394,712	30	333,797	24	256,003	26	296,082	26	338,300	26	237,468
Miscellaneous Manufacturing	339	*	*	*	*	*	*	*	*	*	*	*	*
Wholesale trade	**42**	**621**	**8,236,322**	**596**	**8,413,572**	**565**	**8,546,077**	**377**	**5,448,071**	**588**	**11,461,204**	**470**	**7,933,199**
Merchant Wholesalers, Durable Goods	423	222	2,923,755	205	2,577,532	198	2,460,150	160	1,965,146	224	2,989,896	232	3,614,864
Merchant Wholesalers, Nondurable Goods	424	347	4,485,166	332	4,864,305	305	4,438,133	144	2,435,463	285	7,358,069	157	3,026,471

Wilmington Employment and Wages by Industry

		Dec-07		Dec-08		Dec-09		Dec-10		Dec-11		Dec-12	
	NAICS code	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages
Wholesale Electronic Markets and Agents and Brokers	425	52	827,401	59	971,735	62	1,647,794	73	1,047,462	79	1,113,239	81	1,291,864
Retail trade	**44-45**	**2,086**	**19,295,120**	**1,832**	**16,173,607**	**1,825**	**16,193,675**	**1,870**	**16,655,603**	**1,752**	**15,064,610**	**2,225**	**19,899,199**
Motor Vehicle and Parts Dealers	441	563	8,152,682	480	6,904,379	447	6,056,818	464	6,319,076	472	5,972,618	612	7,354,768
Furniture and Home Furnishings Stores	442	82	1,232,318	77	1,085,975	74	925,073	74	890,405	67	844,544	186	1,821,272
Electronics and Appliance Stores	443	41	754,682	38	751,892	28	602,478	28	450,860	29	433,496	56	1,232,110
Building Material and Garden Equipment and Supplies Dealers	444	178	1,399,298	163	1,288,003	166	1,308,193	167	1,397,488	176	1,356,766	77	837,165
Food and Beverage Stores	445	356	2,006,295	357	1,832,460	470	3,244,562	468	3,243,033	445	2,841,500	502	3,413,946
Health and Personal Care Stores	446	184	1,184,641	158	977,396	168	1,316,369	163	1,351,051	158	1,311,997	267	2,347,599
Gasoline Stations	447	27	128,343	25	93,313	21	99,745	27	111,732	20	83,025	92	427,018
Clothing and Clothing Accessories Stores	448	192	1,035,477	164	909,522	167	788,888	142	658,195	138	648,037	166	652,243
Sporting Goods, Hobby, Book, and Music Stores	451	46	303,999	39	275,652	27	213,972	27	246,738	31	231,635	71	367,509
General Merchandise Stores	452	77	227,552	73	209,492	75	239,470	82	258,990	81	258,225	85	354,267
Miscellaneous Store Retailers	453	159	869,762	167	827,470	142	730,801	187	1,139,384	96	515,136	71	433,414
Nonstore Retailers	454	181	2,000,071	91	1,018,053	*	*	*	*	*	*	40	657,888
Transportation and warehousing	**48-49**	**679**	**7,102,312**	**718**	**7,693,710**	**617**	**7,417,764**	**576**	**7,396,194**	**659**	**7,734,282**	**661**	**9,272,386**
Air Transportation	481	*	*	*	*	0	0	0	0	0	0	0	0
Rail Transportation	483	*	*	*	*	*	*	*	*	*	*	*	*
Water Transportation	484	26	353,546	30	413,520	26	429,609	27	453,502	28	478,052	25	456,133
Truck Transportation	485	17	118,561	10	54,741	9	33,724	*	*	11	48,559	27	95,557

Wilmington Employment and Wages by Industry

		Dec-07		Dec-08		Dec-09		Dec-10		Dec-11		Dec-12	
	NAICS code	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages
Transit and Ground Passenger Transport	486	0	0	0	0	0	0	0	0	0	0	0	0
Pipeline Transportation	487	*	*	*	*	*	*	*	*	*	*	*	*
Scenic and Sightseeing Transportation	488	329	4,254,519	408	5,012,075	335	4,560,042	298	4,437,433	401	4,922,107	360	5,931,134
Support Activities for Transportation	491	0	0	0	0	0	0	0	0	0	0	0	0
Couriers and Messengers	492	267	1,901,796	231	1,725,485	209	1,920,909	203	1,953,378	179	1,791,803	166	1,862,633
Warehousing and Storage	493	24	256,006	22	279,684	22	260,007	23	290,252	21	264,574	61	711,481
Information	**51**	**508**	**9,401,920**	**418**	**6,746,215**	**392**	**6,684,111**	**392**	**5,943,878**	**321**	**5,004,599**	**430**	**5,901,094**
Publishing Industries	511	11	121,811	10	104,387	10	86,769	*	*	*	*	48	749,277
Motion Picture and Sound Recording Industries	512	14	142,728	8	49,547	6	44,282	8	70,972	9	99,981	70	60,348
Broadcasting (except Internet)	515	39	429,893	39	488,123	31	426,447	*	*	23	334,656	28	335,035
Telecommunications	517	366	8,035,268	305	5,612,527	280	5,450,170	*	*	*	*	237	4,414,665
Internet Service Providers, Web Search Portals, and Data Processing Services	518	*	*	0	0	*	*	*	*	*	*	0	0
Other Information Services	519	*	*	*	*	*	*	*	*	*	*	*	*
Finance and insurance	**52**	**11,618**	**271,263,685**	**11,346**	**290,718,707**	**11,476**	**262,628,446**	**11,529**	**286,506,661**	**11,074**	**258,744,716**	**10,718**	**267,628,335**
Monetary Authorities - Central Bank	521	0	0	0	0	0	0	0	0	0	0	0	0
Credit Intermediation and Related Activities	522	9,100	190,526,117	8,927	219,705,441	9,148	203,700,792	9,276	227,295,521	8,885	203,544,838	8,391	205,769,472

Wilmington Employment and Wages by Industry

		Dec-07		Dec-08		Dec-09		Dec-10		Dec-11		Dec-12	
	NAICS code	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages
Securities, Commodity Contracts, and Other Financial Investments and Related Activities	523	729	44,161,295	671	36,371,033	640	21,370,165	509	22,333,042	572	24,003,627	782	29,571,942
Insurance Carriers and Related Activities	524	1,714	33,966,630	1,673	32,760,016	1,639	35,877,221	1,704	36,028,824	1,578	30,383,190	1,507	31,399,340
Funds, Trusts, and Other Financial Vehicles	525	75	2,609,643	75	1,882,217	49	1,680,268	40	849,274	39	813,061	38	887,581
Real estate and rental and leasing	**53**	**633**	**9,112,320**	**586**	**8,187,399**	**525**	**6,457,833**	**550**	**7,294,463**	**627**	**8,367,693**	**684**	**9,411,131**
Real Estate	531	395	6,738,292	363	5,750,633	316	4,113,996	330	4,871,395	398	6,023,492	435	6,440,250
Rental and Leasing Services	532	*	*	*	*	209	2,343,837	220	2,423,068	229	2,344,201	249	2,970,881
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	533	*	*	*	*	0	0	0	0	0	0	0	0
Professional and technical services	**54**	**7,624**	**224,610,503**	**7,121**	**218,251,108**	**6,837**	**217,149,442**	**7,174**	**258,489,026**	**7,612**	**267,980,912**	**7,335**	**394,702,811**
Management of companies and enterprises	**55**	**2,496**	**23,570,626**	**2,158**	**66,542,963**	**1,905**	**23,837,301**	**1,661**	**27,621,755**	**1,772**	**48,456,758**	**1,836**	**58,739,038**
Administrative and waste services	**56**	**4,975**	**30,215,807**	**4,062**	**27,392,610**	**3,796**	**25,192,841**	**4,066**	**29,396,071**	**4,141**	**28,101,763**	**4,497**	**31,929,633**
Administrative and Support Services	561	4,848	28,736,416	3,957	26,066,203	3,693	23,824,095	3,939	27,718,766	3,994	25,924,348	4,369	29,753,741
Waste Management and Remediation Service	562	127	1,479,391	105	1,326,407	103	1,368,746	127	1,677,305	147	2,177,415	128	2,175,892
Educational services	**61**	**666**	**5,352,205**	**656**	**5,765,896**	**544**	**5,541,696**	**635**	**4,621,468**	**650**	**5,620,192**	**799**	**6,987,191**

Wilmington Employment and Wages by Industry

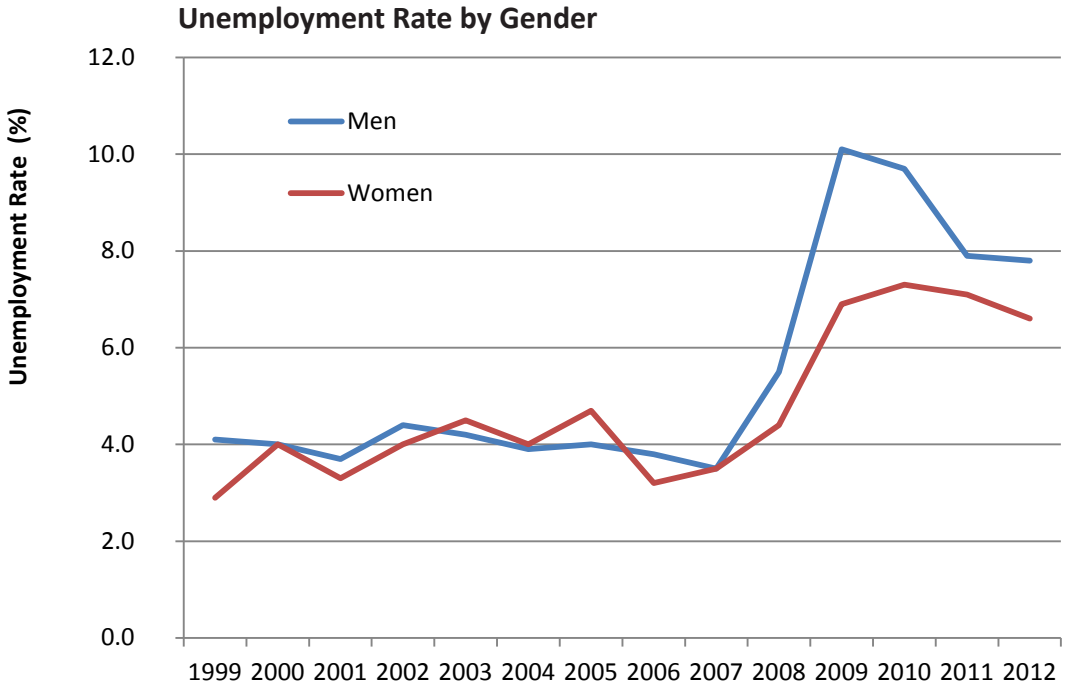
		Dec-07		Dec-08		Dec-09		Dec-10		Dec-11		Dec-12	
	NAICS code	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages
Health care and social assistance	**62**	**6,141**	**64,754,284**	**5,886**	**62,724,790**	**6,109**	**65,426,891**	**6,457**	**66,558,018**	**6,450**	**67,262,298**	**6,731**	**71,171,828**
Ambulatory Health Care Services	621	1,690	28,859,794	1,367	25,262,779	1,342	25,010,462	1,438	27,028,942	1,581	27,703,615	1,674	27,356,168
Hospitals	622	*	*	*	*	*	*	*	*	*	*	*	*
Nursing and Residential Care Facilities	623	*	*	*	*	*	*	*	*	*	*	*	*
Social Assistance	624	2,004	10,996,947	2,100	12,095,917	2,270	13,299,631	2,390	14,436,368	2,117	11,304,802	2,047	11,817,903
Arts, entertainment, and recreation	**71**	**329**	**2,485,168**	**353**	**2,811,672**	**308**	**3,494,054**	**369**	**3,132,642**	**413**	**4,456,279**	**348**	**3,226,348**
Performing Arts, Spectator Sports, and Related Industries	711	171	1,483,267	193	1,766,295	168	2,515,390	232	2,220,903	275	3,620,681	221	2,497,286
Museums, Historical Sites, and Similar Institution	712	123	853,332	123	907,964	112	861,156	115	819,702	128	781,532	72	564,670
Amusement, Gambling, and Recreation Industries	713	35	148,569	37	137,413	28	117,508	22	92,037	10	54,066	55	164,392
Accommodation and food services	**72**	**2,057**	**10,276,912**	**1,979**	**9,917,274**	**2,010**	**9,542,313**	**1,996**	**9,578,675**	**2,356**	**11,901,680**	**2,569**	**12,917,183**
Accommodation	721	76	890,554	167	1,254,012	148	936,889	125	818,919	*	*	428	3,247,317
Food Services and Drinking Places	722	1,981	9,386,358	1,812	8,663,262	1,862	8,605,424	1,871	8,759,756	*	*	2,141	9,669,866
Other services, except public administration	**81**	**1,874**	**15,351,425**	**1,866**	**15,327,620**	**1,689**	**14,063,582**	**1,610**	**14,099,561**	**1,497**	**12,167,638**	**1,606**	**13,180,552**
Repair and Maintenance	811	265	3,423,487	241	3,349,459	214	2,983,848	205	2,767,976	197	2,769,157	210	3,239,679
Personal and Laundry Services	812	645	4,729,512	628	4,675,689	614	4,850,649	619	4,905,542	467	2,975,782	525	3,604,331
Religious, Grantmaking, Civic, Professional, and Similar Organizations	813	913	6,826,667	946	6,955,411	807	5,861,133	743	6,138,348	794	6,156,128	841	6,181,188

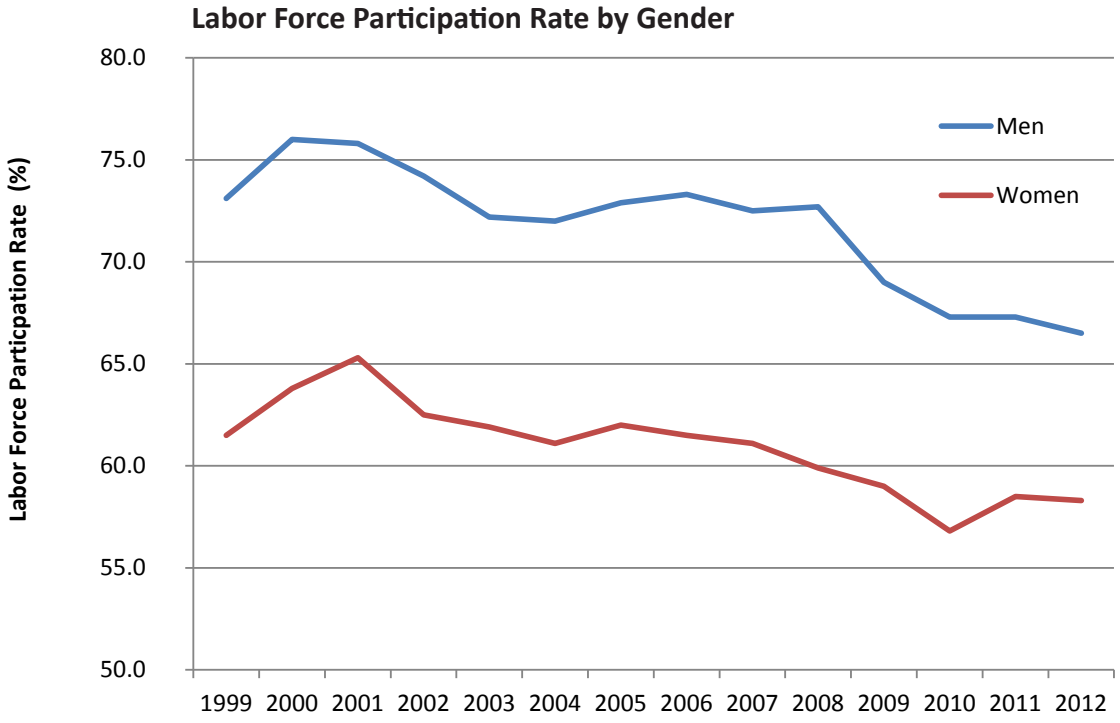
Wilmington Employment and Wages by Industry

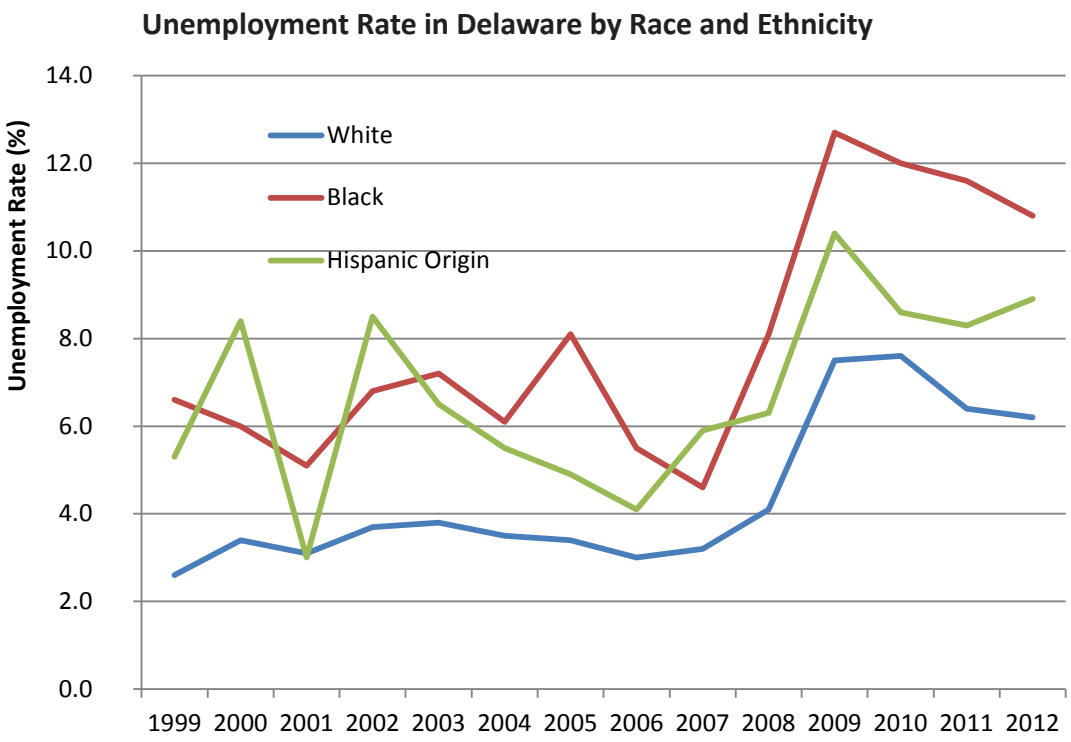
		Dec-07		Dec-08		Dec-09		Dec-10		Dec-11		Dec-12	
	NAICS code	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages	Empl.	Wages
Private Households	814	51	371,759	51	347,061	54	367,952	43	287,695	39	266,571	30	155,354
Federal Government	Fed	1,163	18,595,787	919	14,737,739	1,014	17,843,275	954	17,481,618	919	14,936,312	988	16,017,930
State Government	State	4,728	49,878,090	4,712	49,975,547	4,764	56,995,587	4,688	57,049,733	4,752	58,222,115	4,894	61,061,371
Local Government	Local	2,928	37,414,680	2,984	36,904,804	3,034	42,578,040	3,181	47,023,460	3,270	46,013,584	3,025	47,342,381
Total.Government	Govt	8,819	105,888,557	8,615	101,618,090	8,812	117,416,902	8,823	121,554,811	8,941	119,172,011	8,907	124,421,682

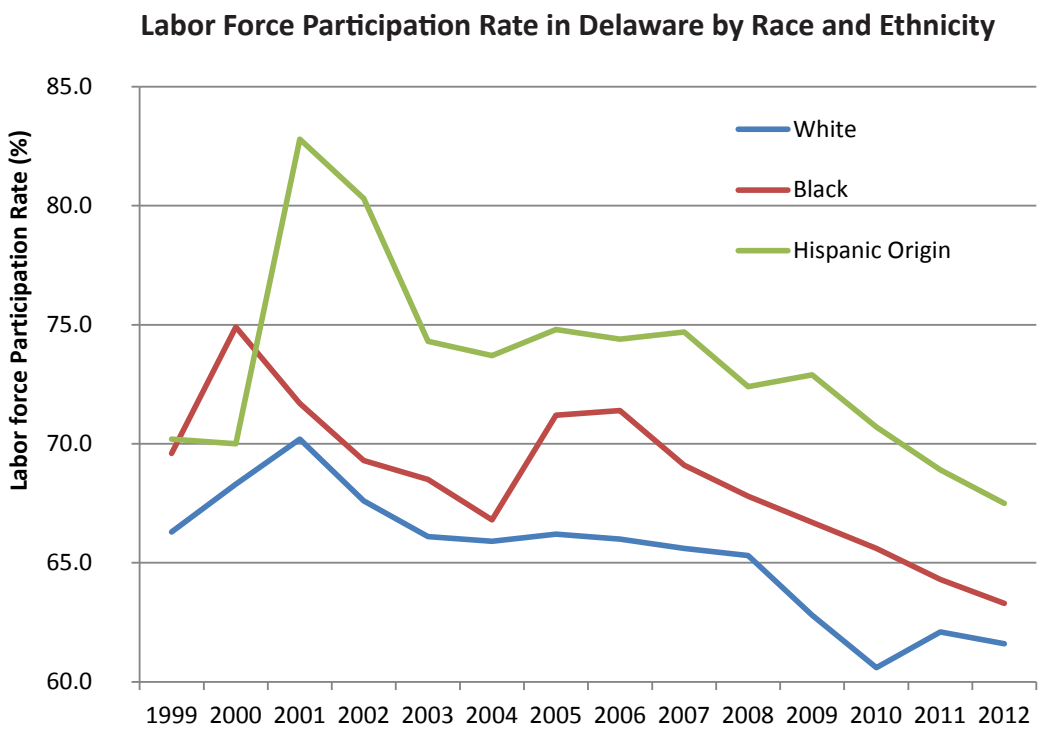
Current Population Survey Demographic Data

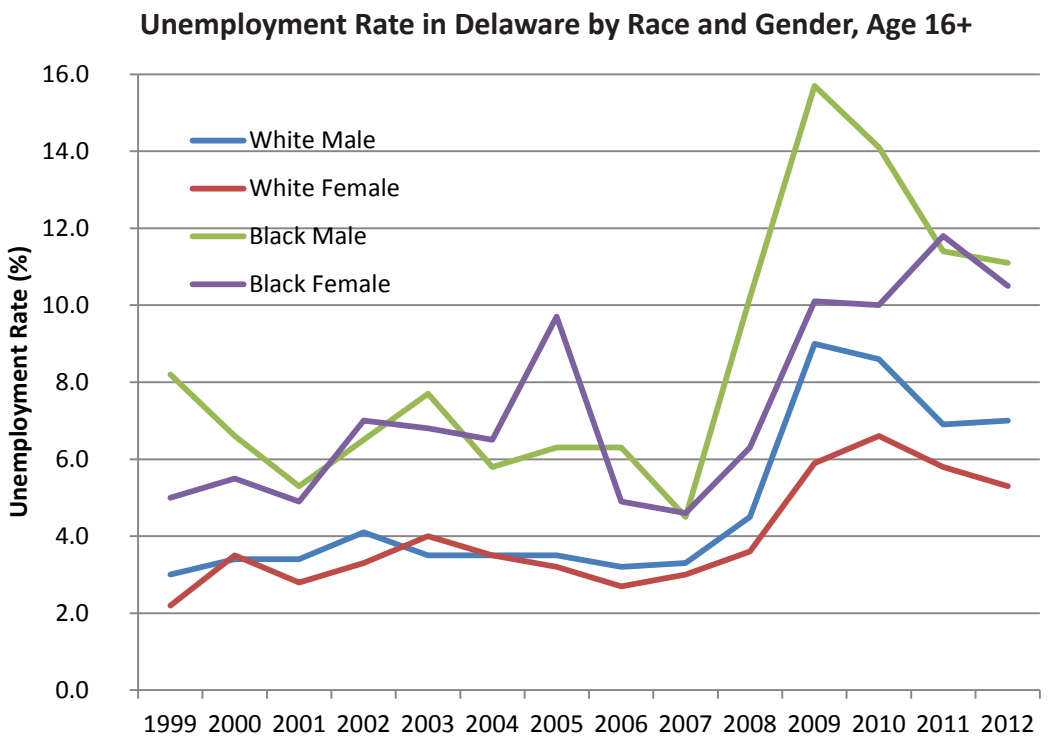
The Current Population Survey (CPS), a monthly survey of approximately 60,000 households across the US, is the source of the national unemployment rate, as well as a great deal of more detailed economic data. In Delaware, about 1,100 households are in the survey each month. This is too few to generate 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.

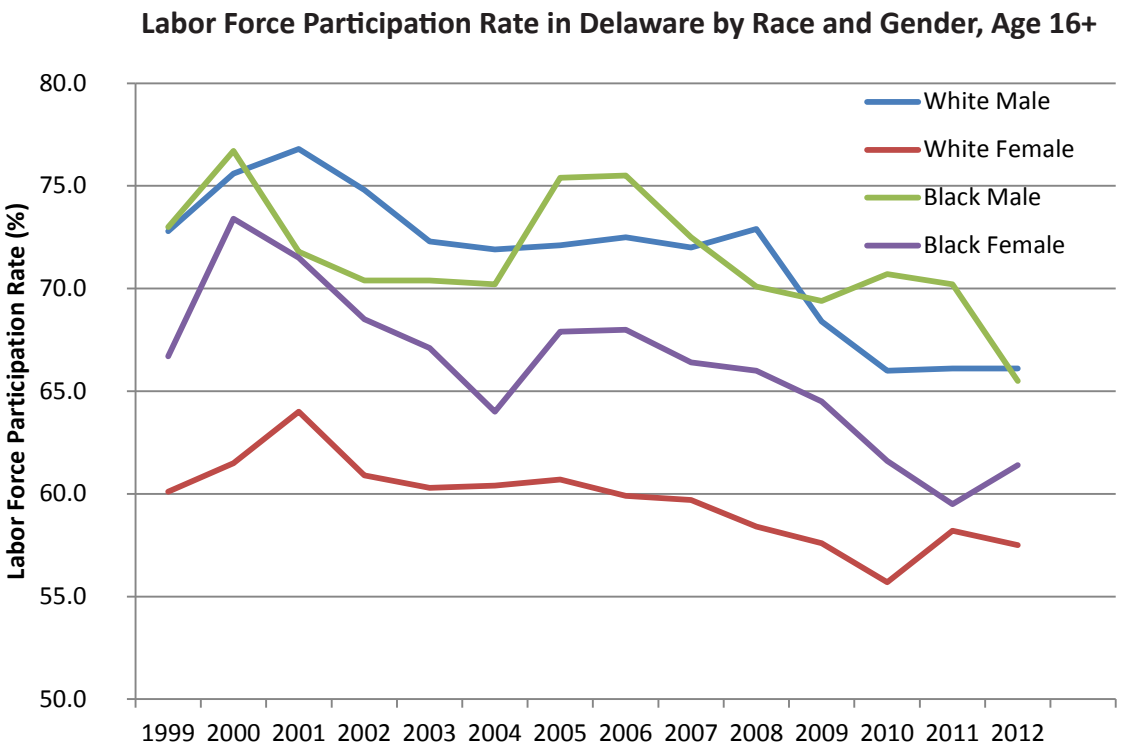


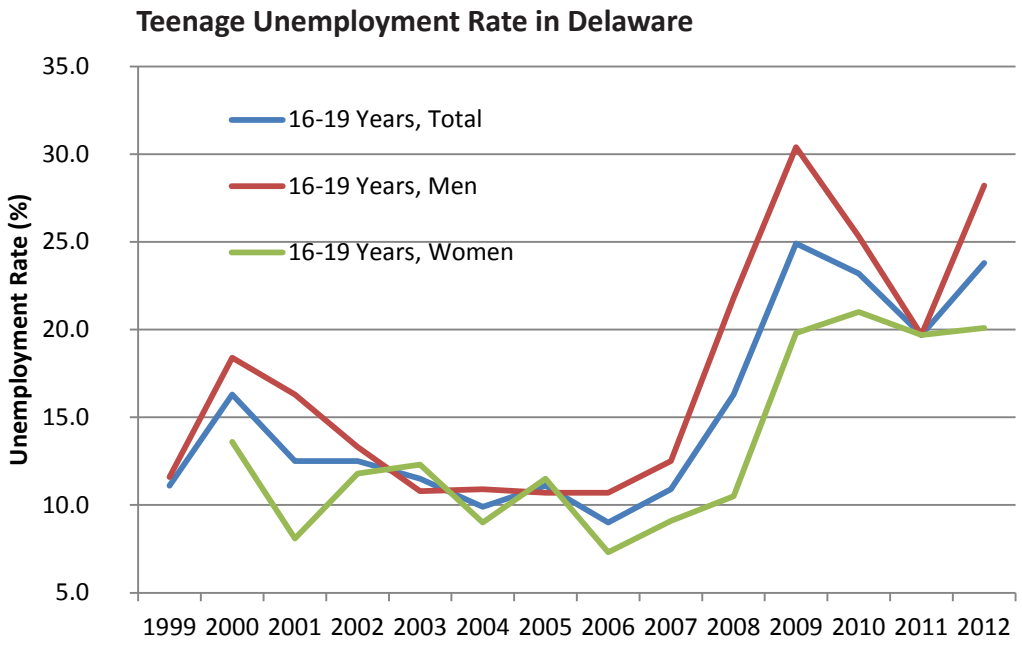


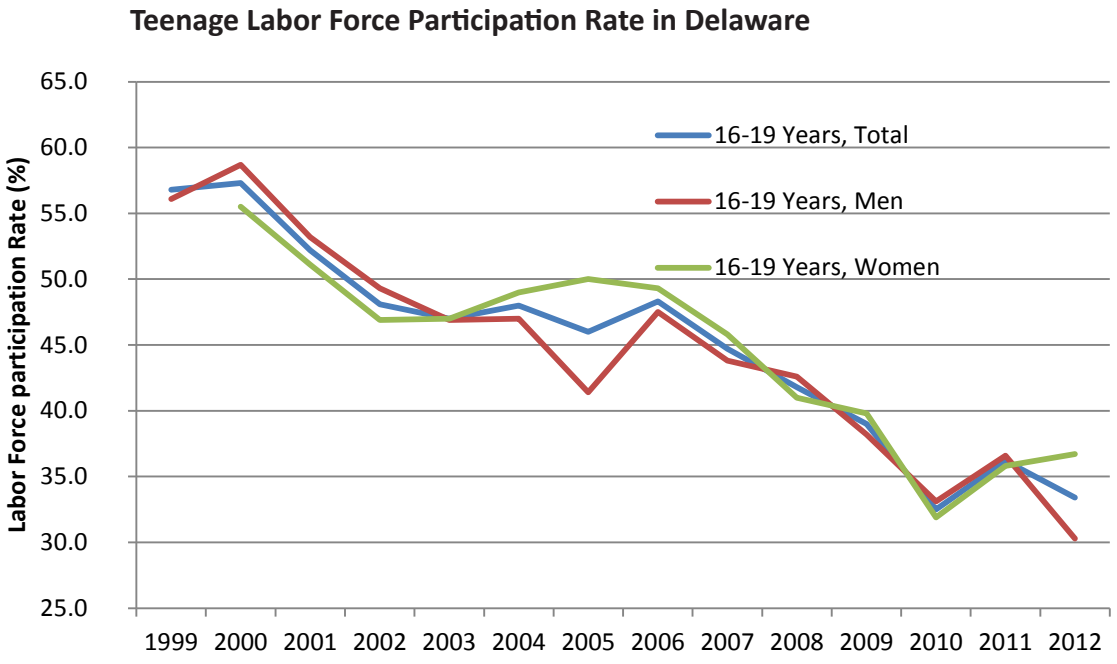

Unemployment Rate in Delaware by Race and Ethnicity
Unemployment Rate (%)
14.0
12.0
10.0
8.0
6.0
4.0
2.0
0.0
White
Black
Hispanic Origin
1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012


Labor Force Participation Rate in Delaware by Race and Ethnicity
Labor force Participation Rate (%)
85.0
80.0
75.0
70.0
65.0
60.0
White
Black
Hispanic Origin
1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012


Unemployment Rate in Delaware by Race and Gender, Age 16+
Unemployment Rate (%)
16.0
14.0
12.0
10.0
8.0
6.0
4.0
2.0
0.0
White Male
White Female
Black Male
Black Female
1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012


Labor Force Participation Rate in Delaware by Race and Gender, Age 16+
Labor Force Participation Rate (%)
80.0
75.0
70.0
65.0
60.0
55.0
50.0
White Male
White Female
Black Male
Black Female
1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012


Teenage Unemployment Rate in Delaware
Unemployment Rate (%)
35.0
30.0
25.0
20.0
15.0
10.0
5.0
16-19 Years, Total
16-19 Years, Men
16-19 Years, Women
1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012


Teenage Labor Force Participation Rate in Delaware
Labor Force participation Rate (%)
65.0
60.0
55.0
50.0
45.0
40.0
35.0
30.0
25.0
16-19 Years, Total
16-19 Years, Men
16-19 Years, Women
1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012