

# Wilmington, Delaware

# SWOT ANALYSIS

November 2014



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Exhibit: Statistical Background Data

## EXECUTIVE SUMMARY

This portion of Phase 2 of the Wilmington, DE Economic Development Strategic Plan provides a competitive assessment of the City as a “product” in the highly competitive economic development marketplace. The assessment was prepared by the team of Wadley-Donovan GrowthTech, LLC and Garnet Consulting Services, Inc.

This SWOT Analysis builds on and adds to the information gathered during Phase 1 of the project, and is a high level evaluation of the City’s current demographic, socio-economic, and economic landscape, including income statistics, population, housing, employment and workforce, racial diversity, poverty level, educational attainment, occupational characteristics, employment by industry, and other characteristics important to economic development analysis.

This study uses information obtained through a combination of:

- The results from a nearly identical companion project being undertaken by the consulting team for New Castle County
- Background research from extensive documents provided by OED in response to a research list provided by the consultant team
- A project alignment meeting with Mr. Harold Gray, Director of the Mayor’s Office of Economic Development and Mr. Stephan Williams of the same office.
- A tour of the City by Mr. Martin Hageman, Executive Director of Downtown Visions, and Mr. Will Minster, Director of Business Development, and Main Street Wilmington Program Manager, Downtown Visions, Wilmington Downtown Business Improvement District.
- Collection of key demographic and other data by the consultant team leading to the preparation of a statistical profile of the City
- Orientation interviews with the chairs of the Mayor’s three Business Roundtable sub-committees.
- Data-focused interviews with several key City staff members
- Six topic-oriented focus groups in which nearly 75 people participated; the topics were:
  - Economic Development
  - Marketing and Promoting the City: Economic Development and Tourism
  - Quality of Life/the Living Environment
  - Wilmington’s Development Regulatory Environment and Planning
  - Workforce, Training and Development
  - Young Professionals and Entrepreneurs
- Additional research were necessary to accumulate additional information for this analysis

The process used is very similar to that used by companies and site location consultants evaluating possible locations (including those where the company may already be located). The following topics were included in the analysis:

- Demographics
- Economic Base
- Location and Access to Markets
- Transportation
- Workforce
- Education
- Utilities
- Telecommunications
- Infrastructure (Other)
- Business climate
- Taxes
- Public services and facilities
- Business support services
- Economic development support services
- Entrepreneurship support
- Financing and incentives
- Available sites and buildings
- Quality of life
- Image and visibility
- Planning and development
- Leadership and politics

Supporting statistics to the SWOT Analysis are provided in the Exhibit.

The purposes of the SWOT Analysis are to identify:

- Major economic development strengths and opportunities on which the City can capitalize
- Competitive weaknesses that should be corrected and obstacles that must be compensated for
- Issues shaping the City’s economic development future

Wilmington has many strengths and opportunities as well as weaknesses and issues. Those topics that were mentioned most frequently in our research, or are considered to be of most importance by the consulting team are:

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>▪ Wilmington’s population and median household income is forecasted to grow over the next five years-with the median income growth exceeding the national average.</li> <li>▪ The educational attainment of the labor force serving the City matches the average of the Philadelphia-Camden-Wilmington MSA, while the percentage with a four year college degree exceeds the national average.</li> <li>▪ The Wilmington employment base in the finance and insurance and the professional and scientific sectors is 15.8 percentage points and 8.4 percentage points respectively above the MSA averages, indicating comparative workforce and cluster advantages. (See Table 2.)</li> <li>• Wilmington’s Central location within the major Northeast Corridor that includes Philadelphia, Baltimore, NYC, Washington DC and Boston (among others) affords excellent market positioning.</li> </ul>	<ul style="list-style-type: none"> <li>▪ There is a forecasted decline in City residents aged 18-34 over the next five years.</li> <li>▪ The City’s median household income is well below the County and national averages.</li> <li>▪ The average educational attainment of the City’s resident is below County and national averages.</li> <li>• The City’s economy is becoming less diverse, narrowing into six business sectors.</li> <li>• The City is losing employment in two key columns to its economic base: financial and professional services.</li> <li>• Recent structural problems with the I-495 bridge in Wilmington are both an accessibility and image problem for the City.</li> <li>• The Port is need of modernization.</li> <li>• The City’s public bus system, while extensive, is aimed at moving low income residents rather than workers to jobs. Bus routes and schedules do not match the commuting needs</li> </ul>

<ul style="list-style-type: none"> <li>• Wilmington’s location at the intersection of major transportation systems.</li> <li>• The leading occupations of City residents are in office/administrative support (14.5%), management (10.8%), and architecture and engineering (9.8%).</li> <li>▪ The University of Delaware offers strong relationships with employers including internships and ongoing entrepreneurship program.</li> <li>• Delaware Technical Community College (DelTech) is highly ranked nationally; all programs have an Employer Advisory Board.</li> <li>• Utilities are generally a strength supporting economic development in Wilmington.</li> <li>• The City and County is served by a strong Internet backbone-99% of the County is covered.</li> <li>• The City administration is working to improve the City’s business climate and perception thereof.</li> <li>▪ The City has an Office of Economic Development with a staff of seven</li> <li>▪ The City of Wilmington has an aggressive economic development program which it is seeking to improve through this project.</li> <li>• The New Castle County Chamber of Commerce is a strong ally of the City’s economic development efforts.</li> <li>▪ DelTech has created a One Million Cups program at its Wilmington Campus (a Kauffman Institute initiative).</li> <li>• The University of Delaware Entrepreneurship program.</li> <li>• The City is the home of several large and active banking institutions.</li> <li>• The City offers a variety of incentive and assistance programs.</li> <li>• The City has a substantial amount of vacant and available property</li> <li>• The City has been active in providing funding or other support that helps development; without this support, many projects are financially infeasible.</li> </ul>	<ul style="list-style-type: none"> <li>of City resident job holders.</li> <li>▪ Most of the City’s residents work outside of Wilmington.             <ul style="list-style-type: none"> <li>○ 27% of City residents work in the City. Of the 28,313 employed City residents, 7,568 work in the City.</li> <li>○ 48% of City residents work elsewhere at scattered locations in New Castle County</li> <li>○ 3% work in Sussex or Kent Counties DE</li> <li>○ 22% commute out of State</li> </ul> </li> <li>• The perceived quality of the area’s public school systems is a major impediment to having more people move to the City and County. Private schools are seen by many as necessary, Tuition at these schools is expensive, making the option of living in Pennsylvania’s Chester and Delaware County’s attractive to residents with children.</li> <li>• There are no summaries or appropriate links on utility availability on the City website.</li> <li>• Verizon’s policies limit broadband availability or result in large costs in some sectors of the City.</li> <li>• The City’s policy on extension of fiber is cited as causing difficulties for companies in the downtown and nearby.</li> <li>▪ The City, County and State are all seen as less business friendly than they should be by many.</li> <li>▪ Several sources stated that while City staffers say they are interested in improving the permit and approval process, efforts in the past have not resulted in any appreciable improvements.</li> <li>▪ Wilmington codes are seen as very rigid – particularly the Fire Code.</li> <li>▪ The development regulations are not seen as being “simple, swift and certain”; rather, they are seen as “muddy”, out-of-date in some areas, and having a Design Review process that is perceived as very subjective with differences between projects and developers.</li> <li>▪ The City’s development process is inadequately described on the City’s website.</li> </ul>
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	<ul style="list-style-type: none"><li>▪ OED frequently hears from the development/ construction industry that a plan will meet the International Building Code, but not the City of Wilmington's. The City may have old codes that conflict with international codes.</li><li>• Wilmington's image as a high crime area, whether based on actual statistics or misperception, hurts the City's image as a good business climate.</li><li>▪ Property taxes are too low because of the State assessment policy using 1983 Fair Market Values.</li><li>• The City's wage tax puts it at a competitive disadvantage with other Delaware locations as well as with some other states.</li><li>• The majority of information typically sought by business prospects and site selection consultants is not available from or linked to the Economic Development portion of the City's website.</li><li>• There is fragmented information about availability of programs and services for small business.</li><li>• The City has no conveniently available inventory of available space or land for construction.</li><li>▪ There is a misperceived crime and public safety issue in downtown Wilmington that taints the County as a whole.</li><li>▪ The City, however, does have a high crime rate, as measured by property and violent crimes versus the County, State and nation.</li><li>▪ The County is missing the level of urban environment sought by many younger workers.</li><li>• The amount of affordable housing may not be enough to accommodate an influx of younger residents.</li><li>• The City has a reputation as not business-friendly.</li><li>• Developers believe there should be more interaction between the development community and the City's Department of Licenses and Inspections.</li></ul>
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Opportunities	Issues
<ul style="list-style-type: none"> <li>▪ The demographics of the City’s labor shed have the characteristics sought by many companies, providing a marketing case for attracting new businesses.</li> <li>• The growth of the professional sector needs to be a goal for the City.</li> <li>• Small employers, rather than large ones offer the best opportunities for the City’s future.</li> <li>• Because of its Interstate Highways, rail, port, and proximity to both the New Castle County and Philadelphia International Airports, position the City as a multi-modal “distribution” hub for both products and services.</li> <li>• Identify areas suitable to transit-oriented development (TOD).</li> <li>• Creation of more and better jobs in the City that match the skill base of City residents can reduce out-commuting, or through expanded training programs to match the needs of City employers.</li> <li>• The public schools districts may have to market themselves, demonstrating their quality compared to PA schools and charter schools.</li> <li>• Improve the City’s competitiveness by providing summary information on available utilities on the city’s website.</li> <li>• The availability of reliable and reasonably priced electric power can support many types of economic development projects.</li> <li>• Market the County’s superior telecom capabilities to businesses requiring such service.</li> <li>▪ Create an institutionalized process for reviewing and streamlining process that is dependable.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The City’s various regulatory agencies and staff do not function as an effective economic development team.</li> <li>• The City, County and State need a more diverse economy.</li> <li>• Recent closure of the I-495 bridge and news reports that it should have been closed sooner raise questions about the status of the City and surrounding area’s overall infrastructure</li> <li>▪ The NCC Airport is underutilized resource, and its name does not help its marketing the facility</li> <li>▪ The Port would be stronger if it were independent</li> <li>▪ Moving people around Wilmington is seen as a major issue</li> <li>▪ Downtown parking is an issue, particularly its cost and strict enforcement</li> <li>▪ City and County employers are heavily dependent on a workforce living outside of the State, particularly Pennsylvania (especially Chester and Delaware Counties), and becoming increasingly so (growing from 26.8% to 32.8% of the workforce between 2002-2011) for the County. Currently 24% of Wilmington’s workforce resides out of state.</li> <li>• This dependence on PA workers poses a potential threat as job opportunities increase in Pennsylvania, allowing alternative employment choices with shorter commuting times.</li> <li>• Public education is a critical issue for the City’s, County’s and State’s economic development and sustainability.</li> <li>• The State needs to consider development of a charter school strategy plan.</li> <li>▪ There is a need for the continued political will to change the City’s development regulations and procedures.</li> <li>▪ Land use regulations and process need to be streamlined.</li> <li>• Lack of Right-to-Work legislation is seen by some as discouraging manufacturing and other major opportunities, but the chance of the</li> </ul>

<ul style="list-style-type: none"> <li>• Create a broad City economic development team and provide team-building training.</li> <li>• Consider creating a unified County-Municipal Economic Development Office.</li> <li>• Engage students and younger residents more in the economic development process.             <ul style="list-style-type: none"> <li>▪ Create a broad purpose “closing fund” to support new business creation and product/services development.</li> </ul> </li> <li>• Make better use of Community Reinvestment Act (CRA) capabilities.             <ul style="list-style-type: none"> <li>▪ Prepare and promote a master list of available properties in the City.</li> <li>▪ Promote the upgrading or redevelopment of properties along Routes 9 and 13 and in other major economic development locations in the City.</li> </ul> </li> <li>• Increase use of the FTZ at the Port of Wilmington.             <ul style="list-style-type: none"> <li>▪ Create a solutions-oriented, customer service mindset within City Hall that focuses on facilitating rather than regulating the development process.</li> <li>▪ Focus future development in existing density corridors and identified opportunity areas in addition to the downtown.</li> </ul> </li> <li>• Conduct team-building program to make rules enforcers part of the economic development team.             <ul style="list-style-type: none"> <li>▪ There is general agreement that the Mayor’s Business Roundtable provides a good foundation for a public-private partnership that can collaboratively work to improve the City and its economic development competitiveness.</li> </ul> </li> </ul>	<p>State becoming a right-to-work state is slight</p> <ul style="list-style-type: none"> <li>▪ Someone must lead an effort to revise the state’s property valuations.</li> <li>• The City’s Wage and Net Profits Tax is the single largest revenue source to the City, accounting for nearly \$65 million (43%) of the total \$151.2 million FY 2015 General Fund budget.</li> <li>• Compliance with new federal regulations is reducing banks’ willingness to lend, particularly for start-ups.</li> <li>• The lack of conveniently available information on commercial and industrial real estate in the City is an impediment to the City’s economic development marketing and competitiveness.             <ul style="list-style-type: none"> <li>▪ The drop in the County’s crime rate will make the County more attractive to businesses and residents over the City. The drop in the County’s rate puts attention on the City, with a rising crime rate.</li> </ul> </li> <li>• The City’s high crime rate and perception of poor public schools (also a County issue), are two of the most critical issues facing the City. Both must be addressed.</li> <li>• Continual attention should be paid to streamlining land use and other development regulations.             <ul style="list-style-type: none"> <li>▪ Leadership is required to meld the various City departments and agencies that come in contact with the economic development process into an effective team.</li> </ul> </li> </ul>
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Based upon the SWOT findings, this document concludes with the identification of 23 potential initiatives that should be considered as elements of the City’s Economic Development Strategic Action Plan. These must be reduced to a more reasonable number to reflect the realities of staff and budget limitations. This can be done through a combination of grouping of similar Initiatives, prioritization, sequencing or elimination. A more detailed discussion of the final list of Initiatives will be provided in Action Plan portion of this strategy.



## INTRODUCTION

This SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis, or Competitive Assessment, is the product of a contract between The Wadley-Donovan Group (through its economic-development unit Wadley-Donovan GrowthTech [WDGT]) and the City of Wilmington, Delaware, in particular, its Office of Economic Development (OED). This is the first section of Phase 2 of an Economic Development Strategic Plan for the City. Two additional deliverables will be submitted as part of this Phase:

- A Target Industry Identification and Profile
- An Economic Development Strategic Action Plan

WDGT partnered with Garnet Consulting Services, Inc. to complete this analysis with each firm taking the lead in preparing the various topical sections of the report, but both firms contributing to the entire document.

This SWOT builds on and adds to the information gathered during Phase 1 of the Economic Development Strategic Plan project. The SWOT analysis is a high level evaluation of the City's current demographic, socio-economic, and economic landscape, including income statistics, population, housing, employment and workforce, racial diversity, poverty level, educational attainment, occupational characteristics, employment by industry, and other characteristics.

As discussed in more detail in the Overview section of the Phase 1 report *City of Wilmington Phase 1 Economic Development Strategic Plan – May 2014*. Phase 1 research included:

- The results from a nearly identical companion project being undertaken by the consulting team for New Castle County
- Background research from extensive documents provided by OED in response to a research list provided by the consultant team
- A project alignment meeting with Mr. Harold Gray, Director of the Mayor's Office of Economic Development and Mr. Stephan Williams of the same office.
- A tour of the City by Mr. Martin Hageman, Executive Director of Downtown Visions, and Mr. Will Minster, Director of Business Development, and Main Street Wilmington Program Manager, Downtown Visions, Wilmington Downtown Business Improvement District.
- Collection of key demographic and other data by the consultant team leading to the preparation of a statistical profile of the City
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- Six topic-oriented focus groups in which nearly 75 people participated; the topics were:
  - Economic Development
  - Marketing and Promoting the City: Economic Development and Tourism
  - Quality of Life/the Living Environment
  - Wilmington's Development Regulatory Environment and Planning
  - Workforce, Training and Development
  - Young Professionals and Entrepreneurs

This Phase 1 research provided the consultant team insights and directions for further analysis in Phase 2. Selected additional research was conducted to provide the information necessary for this SWOT Analysis. In particular, extensive research was undertaken from the City's and other websites in a process similar to that used by companies and site selection consultants evaluating possible locations (including those where the company may already be located).

We must note here, as we do in other portions of this report, that the City's website is substantially inadequate to support an aggressive and successful economic development program. This is not unusual in more urbanized areas where a general purpose municipal website must cover an extensive amount of information, much of it unrelated to the economic development function. This frequently leads to the development of a separate website focused on economic development with a simple link from the general purpose website.

This report provides a summary Competitive Assessment. It also contains a list of potential initiatives recommended for consideration by the City as a foundation for its Economic Development Strategic Action Plan and for the identification of recommended target industries.

## COMPETITIVE ASSESSMENT

This SWOT provides a summary listing of Wilmington’s primary strengths and weaknesses as a location for business, as well as opportunities for economic growth and issues that may impede or shape those opportunities. References to New Castle County assets, challenges, opportunities and issues are made when they impact the City. This inclusion of the County’s operating environment in the analysis is necessary because the economies, workforce, quality of life and other elements of the City and County are very closely intertwined.

Items noted in bold were cited by numerous sources uncovered during the research process and/or are considered of particular importance by the consulting team. These opinions were gathered from focus group meetings, interviews, review of numerous research documents provided by staff, and substantial on-line research. It should be noted that this research includes both that conducted specifically for the City of Wilmington as well as research prepared for a similar project conducted in parallel for New Castle County.

This Competitive Assessment was conducted in a manner similar to how a site location consultant or company would evaluate potential locations. The topics covered in the analysis are those researched in the facility location process and by economic development organizations in the creation of their strategic plans.

### Demographics

Wilmington’s key economic development related demographic strengths, opportunities, weaknesses, and issues are highlighted below. See the Statistical Background Data exhibit for supporting data. Referenced tables and figures appear below the summary sections.

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ The City’s population is expected to grow by 1,300 over the next five years. By 2018 the population is forecasted to be 72,600, a gain of 1.8% from 2013.</li> <li>▪ New Castle County’s population is forecasted to grow faster than the Philadelphia-Camden-Wilmington Metro area between 2013 and 2018. (See Figure 1.)</li> <li>▪ The City has a low median age (35.0 years vs. 37.6 for the County, and 37.5 for the nation). A younger-aged population is an attraction to firms seeking a younger workforce and potential future workforce.</li> <li>▪ Wilmington’s median household income is expected to grow by 5.2% over the next five years, faster than the County (4.3%), U.S. (1.1%) and State (3.9%) rates. (See Figure 2.)</li> <li>▪ The County has a higher median household income than the Metro area, state and nation (See Figure 3.), showing a strong consumer</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ Wilmington had a decline in population of 1,091 between 2000 and 2013, dropping from 72,468 to 71,377.</li> <li>▪ The City and County population growth rates between 2013 and 2018 are slower than the national and state averages, showing a potential for declining economic influence and slower economic growth. (See Figure 5.)</li> <li>▪ There is a significant forecasted decline in the percentage of residents 18-34 over the next 5 years (-4.2%) in Wilmington, while remaining stable for the County (0.1%), This group is the heart of the Young Professional sector which is so desired by employers. Nationally, the growth rate will be 0.9%. There is a forecasted decline in Wilmington of 785 residents in this age group by 2018.</li> <li>▪ A decline is forecast for the age group 35-54 years old over the next five years in the County and MSA, representing the core of the</li> </ul>

market that supports diversified quality of life amenities in Wilmington and the County; and a forecasted growth rate almost four times the U.S. average (4.3% vs. 1.1%) shows sustained support for diversified quality of life amenities in the area.

- The educational attainment of County residents closely matches the MSA average, showing the County offers a regionally competitive environment for economic development keyed to higher educational attainment. (See Figure 4.) This factor is critical for the City, since most of its workforce comes from the County. (See the Strengths section under the Workforce Assessment of this report.)
- The percentage of County residents with a four year college degree (33.2%) exceeds the national average (28.1%) by 5 percentage points-an appealing characteristic for technical development, and an important strength for Wilmington’s workforce.

**Opportunities**

- With a growing, younger, diverse and high income population within commuting range in the MSA, the County can make a marketing case to attract residents and companies.

experienced and career-established workforce for City employers.

- The City has a low median household income (\$36,100 vs. \$62,600 for the County and \$49,800 for the U.S.).
  - There is a geographic divide: roughly demarcated by southeastern Wilmington and northwestern Wilmington.
- The City’s demographic characteristics are divided along racial lines, as demonstrated in key characteristics shown in the following table:

Characteristic	Non-Hispanic White	African American
Median household income 2010	\$87,348	\$33,662
Income growth 1999-2010	8%	-26%
Poverty rate*	9%	30%
% Unemployed 2010	6.5%	16.4%
% adults with college degree	47%	12%

\* An annual income of \$22,113 for a family of four is the threshold that determines poverty status.

*Source: Alan Mallach, Non-Resident Senior Fellow, Metropolitan Policy Program, The Brookings Institution*

- Educational attainment in the City is low, with 20.0% of residents without a high school diploma, versus 11.2% for the County and 14.6% for the U.S, and in the percentage of residents with a four year degree (25.2% for the City, 33.2% for the County and 28.1% for the U.S.). (See Figure 6.)

**Issues**

- Not Applicable

Figure 1 - Population Growth Rate 2013-2018

Source: Nielson Claritas

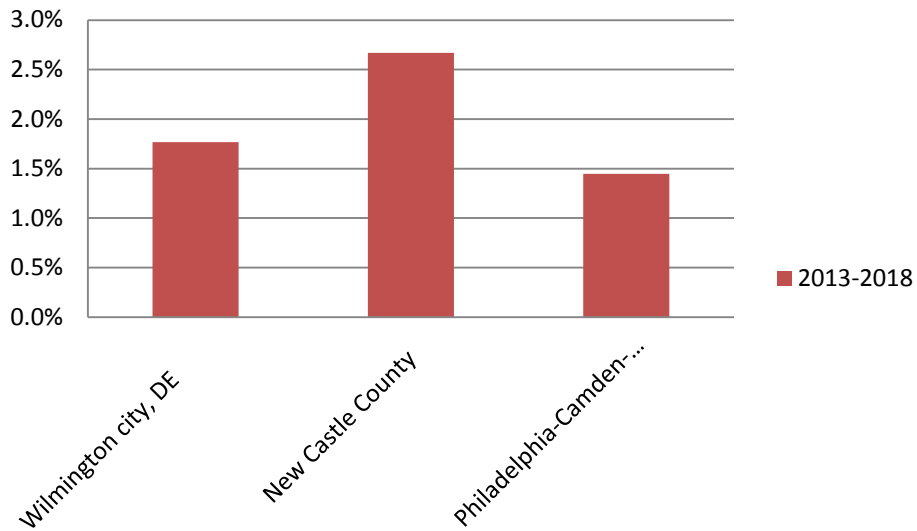
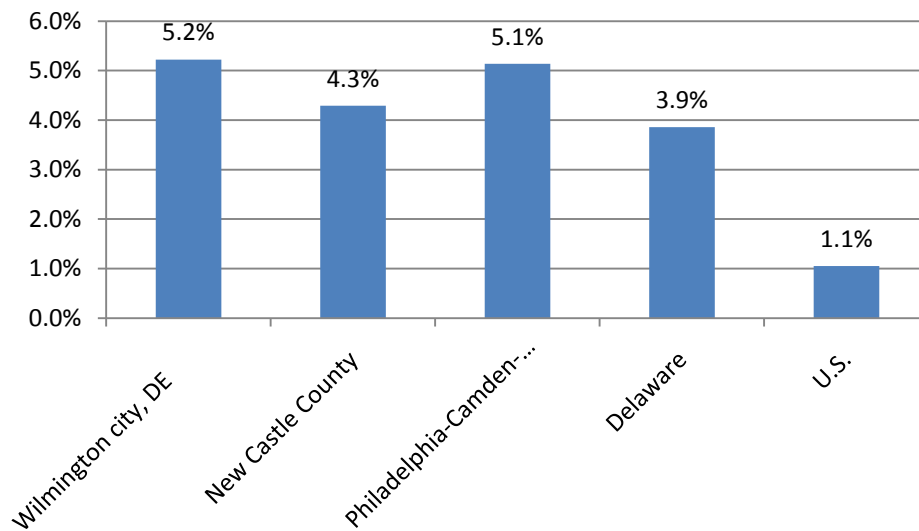


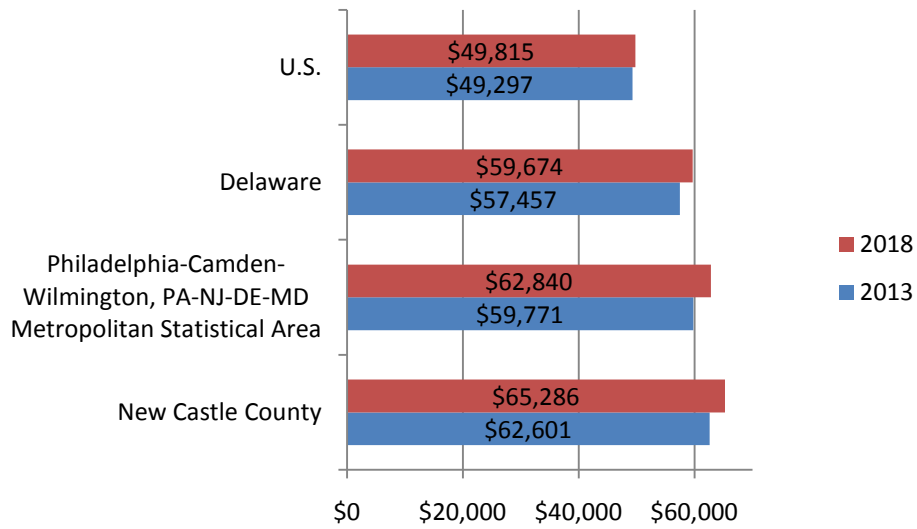
Figure 2 - Change in Median Household Income 2013-2018

Source: Nielson-Claritas



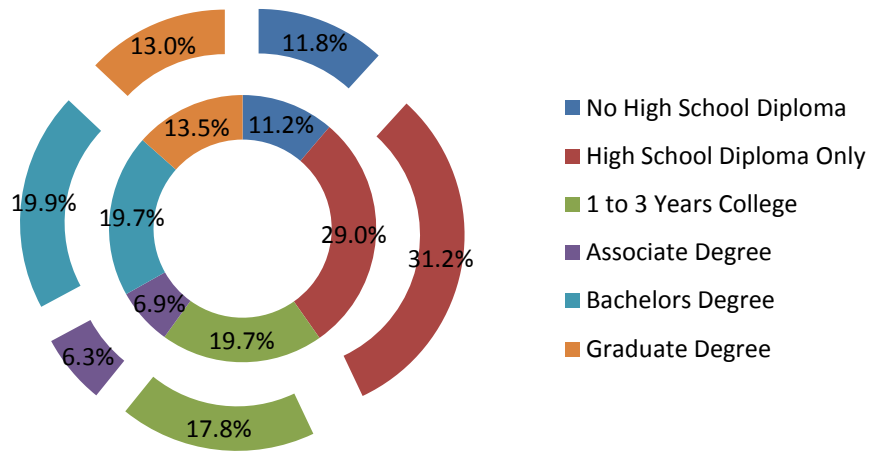
**Figure 3 - Median Household Income 2013 and 2018**

Source: Nielson-Claritas



**Figure 4 - Percent of County and Metro Area Residents by Level of Education: 2013**

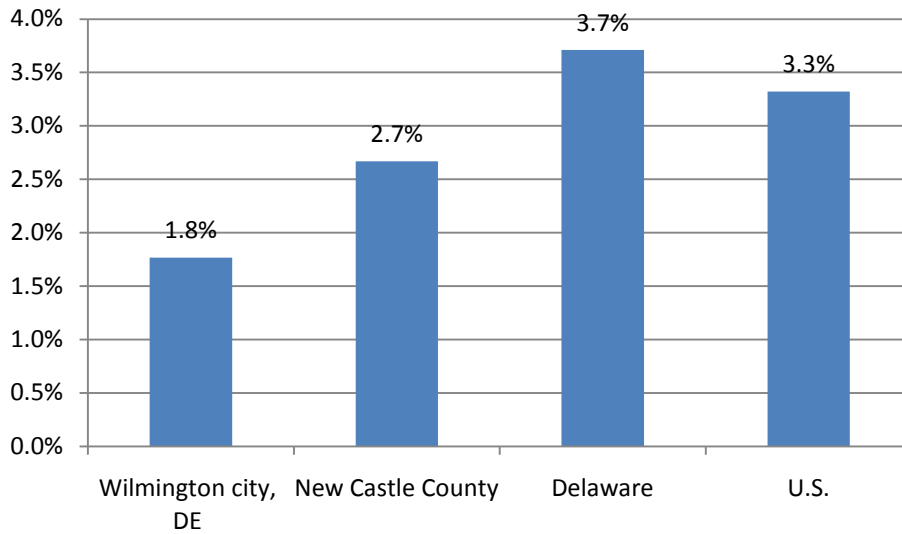
Source: Nielson-Claritas



Outer Circle is the Philadelphia-Camden-Wilmington MSA  
 Inner Circle is New Castle County

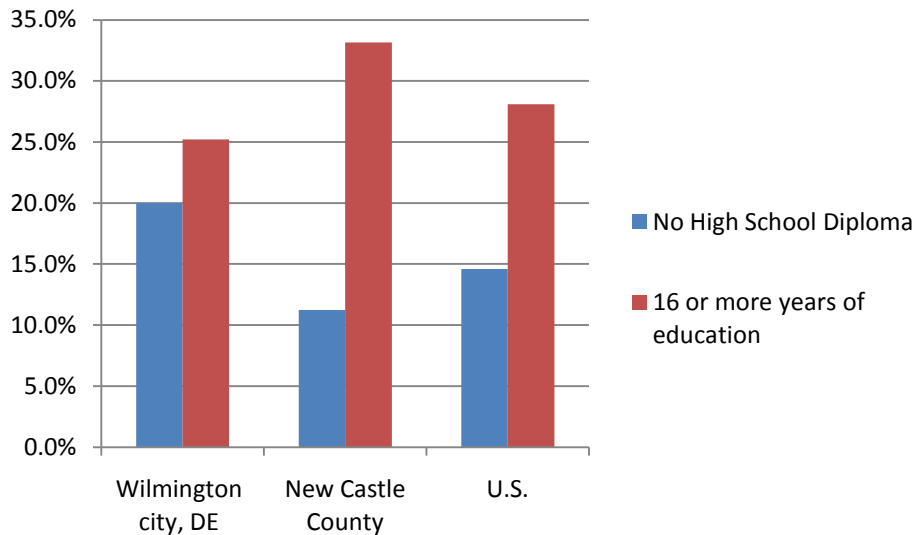
**Figure 5 - Percent Population Growth 2013-2018**

*Source: Nielson-Claritas*



**Figure 6 - Percent of Residents by Educational Attainment Wilmington, New Castle County and the U.S.: 2013**

*Source: Nielson-Claritas*



## Economic Base

The key economic base strengths, opportunities, weaknesses, and issues of the City and County are highlighted below. County data is included because of the strong inter-connection between its economy and the City's, and government reported economic data for New Castle County includes Wilmington. See the Statistical Background Data exhibit for supporting data. Referenced tables and figures appear below the summary sections.

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ The employment base of the City is in Finance and Insurance (22.4%), Professional and Technical Services (16.8%) and Health Care and Social Assistance (11.2%). (See Table 1)</li> <li>▪ The employment base of the County is in healthcare and social assistance (16.0%), finance and insurance (12.9%), retail (10.8%), and educational services (8.5%).</li> <li>▪ The Wilmington employment base in the finance and insurance and the professional and scientific sectors is 15.8 percentage points and 8.4 percentage points respectively above the MSA averages, indicating comparative workforce and cluster advantages. (See Table 2.)</li> <li>▪ Industry clusters in the County (including Wilmington) are in advanced materials, biomedical/biotechnical (life sciences), business and financial services, information technology and information services, according to StatsAmerica. The ratio of employment to total employment is higher than the national average for these industries. The Data for Wilmington is not available.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ City gains in employment in transportation and warehousing between 2002 and 2011, as reported by On-the-Map may be signaling an opportunity for growth via the Port of Wilmington. Although the growth was a modest 599, this sector was one of the six growth industry sectors in the city during this time.</li> <li>▪ The growth of the professional and scientific sector needs to be a goal, building off of the County's strong legal services, science and mathematical foundations.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ The number of jobs in the City declined by 5.3% (2,869) between 2002 and 2011, reflecting among other things, a decline in the wage tax base. (See Table 3.) <ul style="list-style-type: none"> <li>○ The greatest gains were in health care and social assistance and transportation and warehousing</li> <li>○ The greatest losses were in manufacturing and arts and entertainment.</li> </ul> </li> <li>▪ Wilmington lost jobs in the finance and professional services sectors between 2002 and 2011. This is of concern because these two sectors are pillars of the City's economy.</li> <li>▪ <b>The City's economy, as measured by job distribution, is becoming less diverse.</b> Only six of 21 industry sectors had employment gains between 2002 and 2011, compared to the MSA where 11 sectors had employment growth and two remained stable. (See Table 3.)</li> <li>▪ Employment in the professional and scientific sector, though still comparatively high, declined between 2002 and 2011.</li> <li>▪ The future of the Astra Zeneca operations is in question considering potential acquisition by other Pharmaceutical firms.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ The City is seeing a shift in its economic base, as employment in financial and professional services declines and employment in health care gains.</li> <li>▪ <b>The City, County and State need more diverse economies.</b> Historically they have had their major economic bases in chemicals, then finance. Finance may now be declining, so the next direction for the three area's needs to be identified.</li> </ul>



- Strong scientific capability in workforce can support future scientific and technology R&D in Wilmington.
- Look at what the University of Delaware is specializing in and build clusters around those areas.

**Table 1 – Percent Employment Distribution by Industry Sector 2011, City of Wilmington**

*Source: U.S. Census On the Map*

Industry Sector	Share
Finance and Insurance	22.4%
Professional, Scientific, and Technical Services	16.8%
Health Care and Social Assistance	11.2%
Public Administration	7.6%
Educational Services	6.7%
Administration & Support, Waste Management and Remediation	5.8%
Accommodation and Food Services	4.3%
Retail Trade	4.1%
Construction	3.7%
Transportation and Warehousing	3.5%
Other Services (excluding Public Administration)	3.0%
Management of Companies and Enterprises	2.5%
Manufacturing	1.8%
Wholesale Trade	1.7%
Real Estate and Rental and Leasing	1.7%
Utilities	1.2%
Information	1.0%
Arts, Entertainment, and Recreation	0.9%
Agriculture, Forestry, Fishing and Hunting	0.0%
Mining, Quarrying, and Oil and Gas Extraction	0.0%
Total	100%

**Table 2 –Percent Employment Distribution by Industry Sector 2011, City of Wilmington and Philadelphia/Camden/Wilmington Metropolitan Statistical Area**

*Source: U.S. Census On the Map*

Industry Sector	Wilmington	MSA
Accommodation and Food Services	4.3%	6.6%
Administration & Support, Waste Management and Remediation	5.8%	5.7%
Agriculture, Forestry, Fishing and Hunting	0.0%	0.3%
Arts, Entertainment, and Recreation	0.9%	1.4%
Construction	3.7%	3.8%
Educational Services	6.7%	10.1%
Finance and Insurance	22.4%	6.6%
Health Care and Social Assistance	11.2%	16.5%
Information	1.0%	2.2%
Management of Companies and Enterprises	2.5%	2.1%
Manufacturing	1.8%	7.7%
Mining, Quarrying, and Oil and Gas Extraction	0.0%	0.0%
Other Services (excluding Public Administration)	3.0%	3.3%
Professional, Scientific, and Technical Services	16.8%	8.4%

Philadelphia/Camden/Wilmington Metropolitan Statistical Area (Cont'd)

Source: U.S. Census On the Map

Industry Sector	Wilmington	MSA
Public Administration	7.6%	3.8%
Real Estate and Rental and Leasing	1.7%	1.4%
Retail Trade	4.1%	11.0%
Transportation and Warehousing	3.5%	3.4%
Utilities	1.2%	0.6%
Wholesale Trade	1.7%	4.9%

Table 3 - Percent Change in Employment 2002-2011 by Industry Sector, City of Wilmington

Source: U.S. Census On the Map

Industry Sector	Percent Change
Health Care and Social Assistance	116.1%
Transportation and Warehousing	50.9%
Educational Services	26.4%
Administration & Support, Waste Management and Remediation	20.3%
Public Administration	7.3%
Real Estate and Rental and Leasing	0.5%
Mining, Quarrying, and Oil and Gas Extraction	0.0%
Professional, Scientific, and Technical Services	-1.0%
Other Services (excluding Public Administration)	-5.4%
Finance and Insurance	-5.4%
Construction	-6.9%
Agriculture, Forestry, Fishing and Hunting	-9.1%
Management of Companies and Enterprises	-16.7%
Accommodation and Food Services	-21.2%
Retail Trade	-23.6%
Wholesale Trade	-30.7%
Information	-43.6%
Utilities	-50.0%
Arts, Entertainment, and Recreation	-50.6%
Manufacturing	-79.9%
Total	-5.3%

Location and Access to Markets

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>Wilmington’s Central location within the major Northeast Corridor that includes Philadelphia, Baltimore, NYC, Washington DC and Boston (among others) affords excellent market positioning (see Figure 7).</li> <li>The City’s central location is excellent for providing business services within the Philadelphia – Baltimore portion of the corridor.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>Recent structural problems with the I-495 bridge in Wilmington are both an accessibility and image problem for the City.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>The recent closure of the I-495 bridge and news reports that it should have been closed sooner raise questions about the status of the City and surrounding area’s overall</li> </ul>

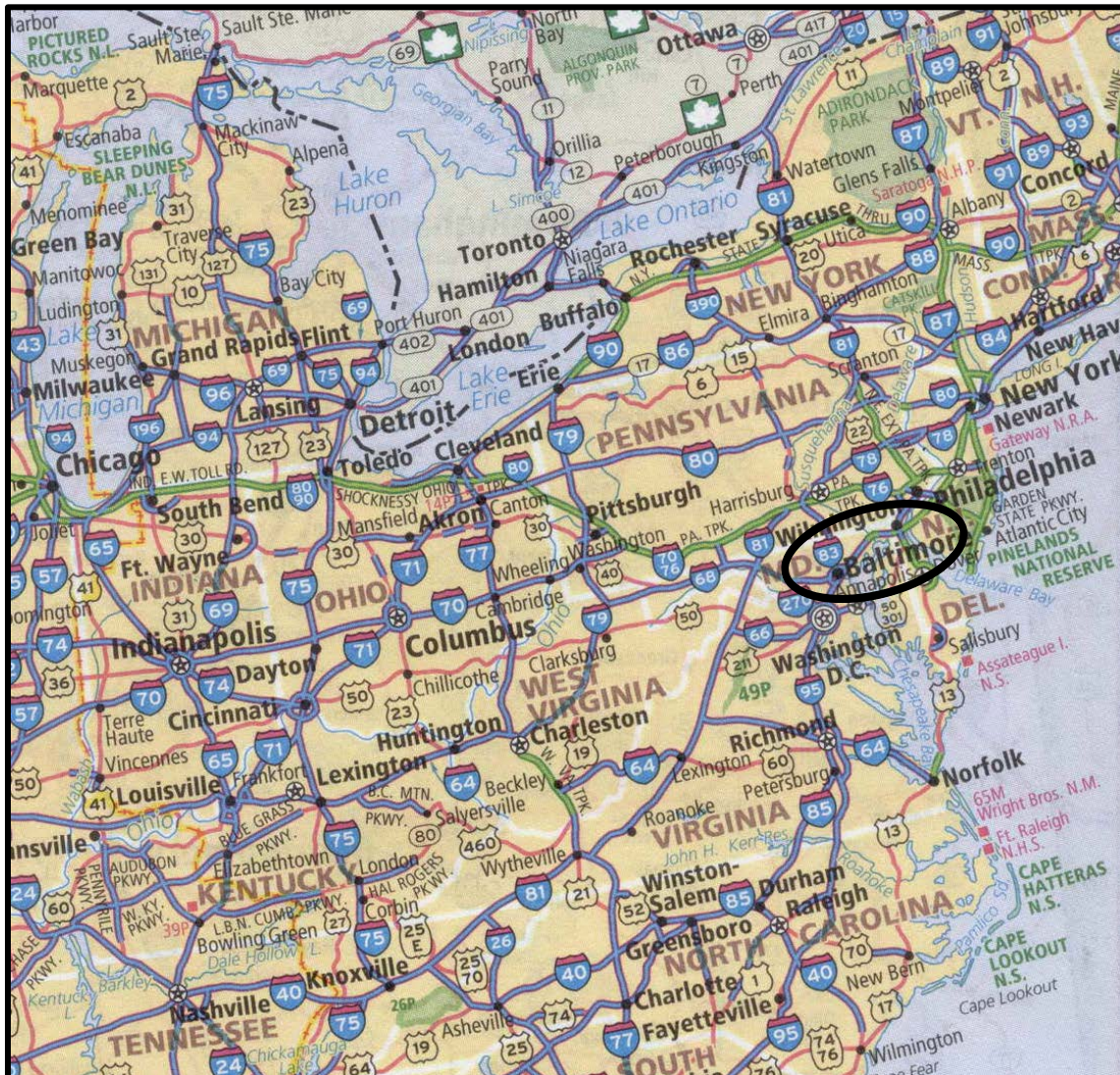
- The Eastern U.S. and Canada, and Western European markets can be easily accessed from Wilmington.
- The City offers one-day truck driving time to many large metropolitan areas (see Table 4—driving time of 10 hours or less is considered a one-day drive).

**Opportunities**

- Because of its Interstate Highways, rail, port, and proximity to both the New Castle County and Philadelphia International Airports, position the City as a multi-modal “distribution” hub for both products and services.

infrastructure.

**Figure 7 - Relationship of Wilmington to the Eastern US**  
*Source: Road Map USA*



**Table 4 - Mileage and Driving Time to Selected Major US Cities**

Source: Google Maps

City	Highway Miles	Driving Time
Philadelphia, PA	32	37 minutes
Baltimore, MD	69	1 hour 14 minutes
Allentown, PA	79	1 hours 36 miles
Washington, DC	108	1 hour 57 minutes
New York, NY	126	2 hours 5 minutes
Norfolk, VA	245	4 hours 21 minutes
Pittsburgh, PA	298	4 hours 47 minutes
Boston, MA	339	5 hours 2 minutes
Columbus, OH	466	7 hours 20 minutes
Charlotte, NC	508	8 hours 16 minutes
Louisville, KY	680	10 hours 3 minutes
Chicago, IL	752	11 hours 34 minutes
Atlanta, GA	769	11 hours 26 minutes
Dallas, TX	1,436	20 hours 56 minutes

## Transportation

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• Wilmington’s location at the intersection of major transportation systems:                             <ul style="list-style-type: none"> <li>○ Interstates 95, 296, 495 (see Figure 8)</li> <li>○ Passenger rail (Amtrak and SEPTA – see Figures 9 and 10)</li> <li>○ Rail freight (Norfolk Southern, CSXT – see Figure 11)</li> <li>○ Port of Wilmington (see Table 5 for details)</li> <li>○ Proximity to Philadelphia International Airport (19 miles)</li> <li>○ Wilmington/Philadelphia Regional Airport with commercial air service by Frontier Airlines to several nonstop destinations(see Figure 12)</li> </ul> </li> <li>▪ The Wilmington train station is reported to be one of the busiest in the Amtrak system.</li> <li>▪ Norfolk Southern and CSXT are two of the seven Class I (or A) freight railroads operating in the U.S. Indicating they are major freight haulers by operating revenue.</li> <li>▪ Wilmington has a generally good local road system (with some improvements needed) – Routes 2, 9, 13, 48, 52, 202, others.</li> <li>▪ Wilmington’s FY 2014-2019 Capital Improvements Program includes a continuing series of road improvements.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ There is limited commercial air service at New Castle County Airport and its runway length does not allow large air freighters; the runway length can’t be extended due to Route 13 at one end and a County building at the other end.</li> <li>▪ Port use is limited by a lack of expansion capability and channel depth on the Christina River, although the Delaware River is being deepened to 42 feet.</li> <li>▪ The Port is in need of modernization, but plans were abandoned after problem with obtaining new operator.</li> <li>▪ The Port has no bonding authority – it requires legislative approval.</li> <li>▪ The public bus system, while extensive, is aimed at moving low income residents rather than workers to jobs.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ The NCC Airport is underutilized resource, and its name does not help its marketing the facility.</li> <li>▪ The Port would be stronger if it were independent.</li> <li>▪ Moving people around Wilmington is seen as a major issue.</li> </ul>

<ul style="list-style-type: none"> <li>▪ The Delaware River and Bridge Authority (DRBA) is considering a new terminal with retail services at the New Castle County Airport.</li> <li>▪ Wilmington is the focal point for DART’s public bus service (see Figure 13) with \$80 million in state subsidies for public transit.</li> <li>▪ WILMAPCO is working on better public transportation.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Position the City as a multi-modal “distribution” hub for both products and services.</li> <li>▪ Identify areas suitable to transit-oriented development (TOD).</li> </ul>	<ul style="list-style-type: none"> <li>○ Public transportation is to help the poor, not for workers</li> <li>○ Buses running empty between suburbs and city</li> <li>○ No shelter at Rodney Square</li> <li>▪ Downtown parking is an issue.             <ul style="list-style-type: none"> <li>○ Moratorium on development of more surface parking a couple of years ago</li> <li>○ Office density has increased to 7-8 workers/1000 SF</li> <li>○ Existing lots are now 96% occupied despite a 22% downtown vacancy rate</li> <li>○ Very expensive at night</li> </ul> </li> </ul>
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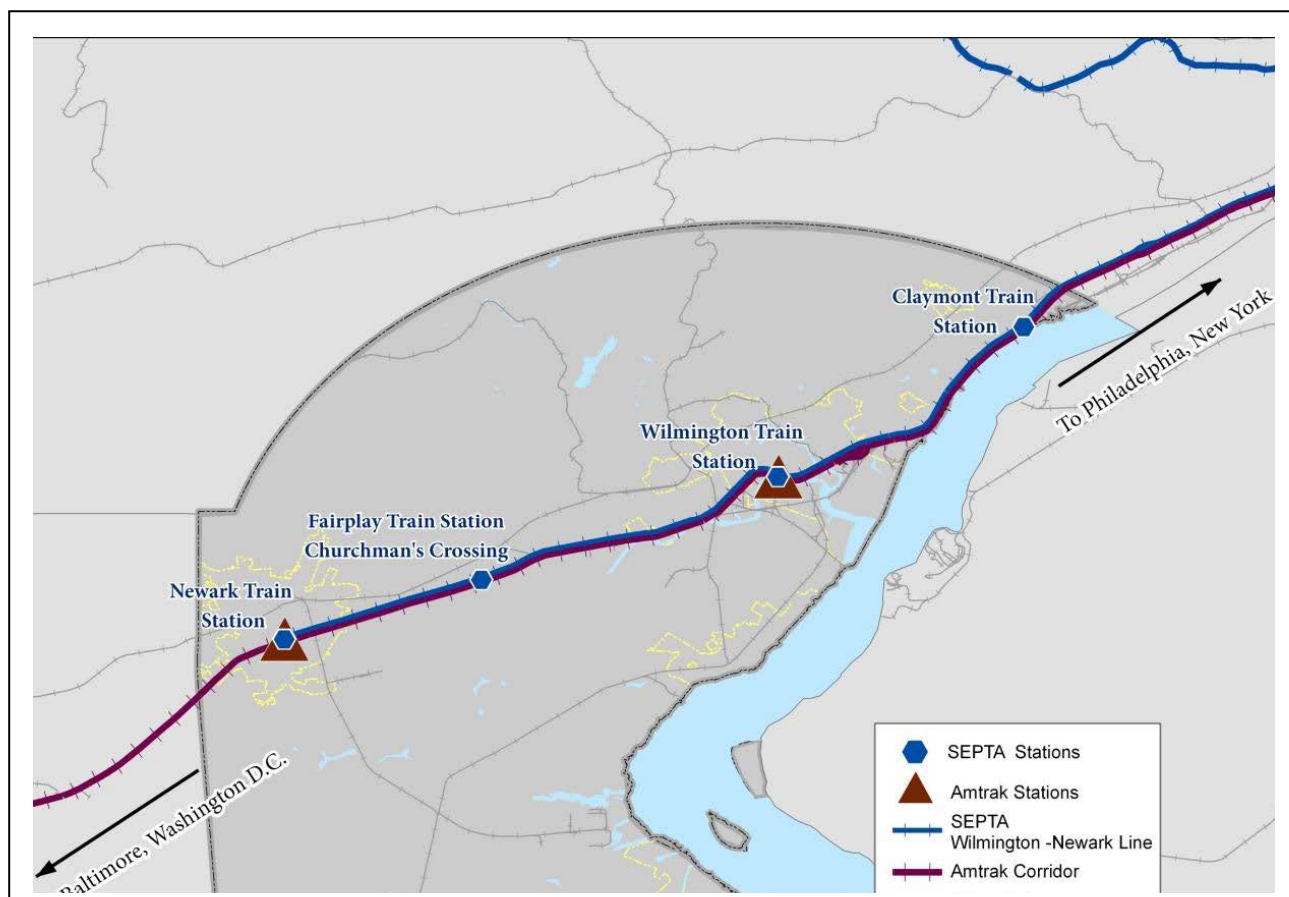
**Figure 8 – Interstates Serving Wilmington**  
*Source: Google*



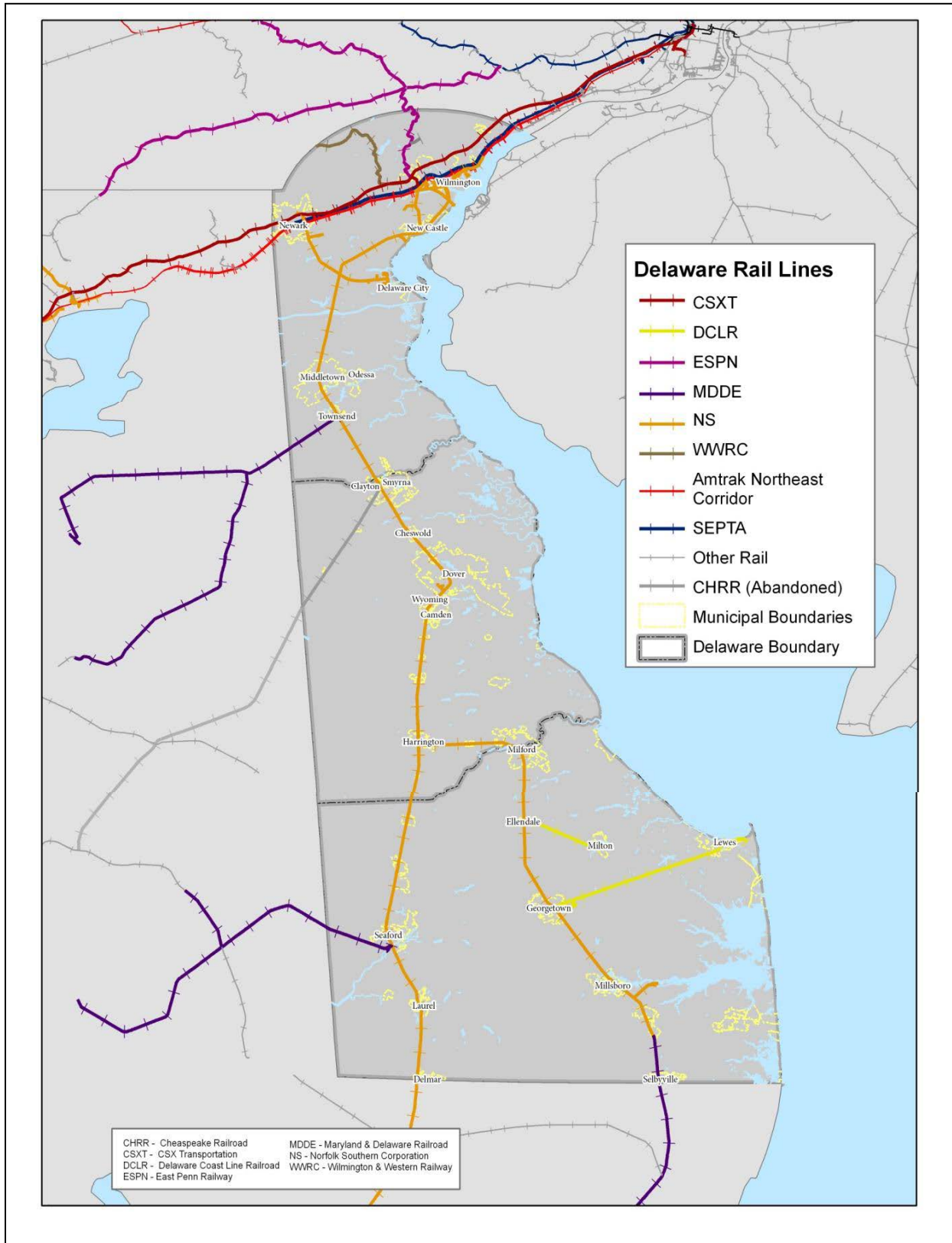
Figure 9 – Amtrak Northeast Passenger Rail Routes  
Source: Amtrak Website



Figure 10 – Amtrak and SEPTA Rail Routes and Stations in Northern Delaware  
Source: Delaware State Rail Plan



**Figure 11 – Delaware Rail Lines**  
 Source: Delaware State Rail Plan



**Table 5 – Major Features of the Port of Wilmington***Source: Port of Wilmington Website*

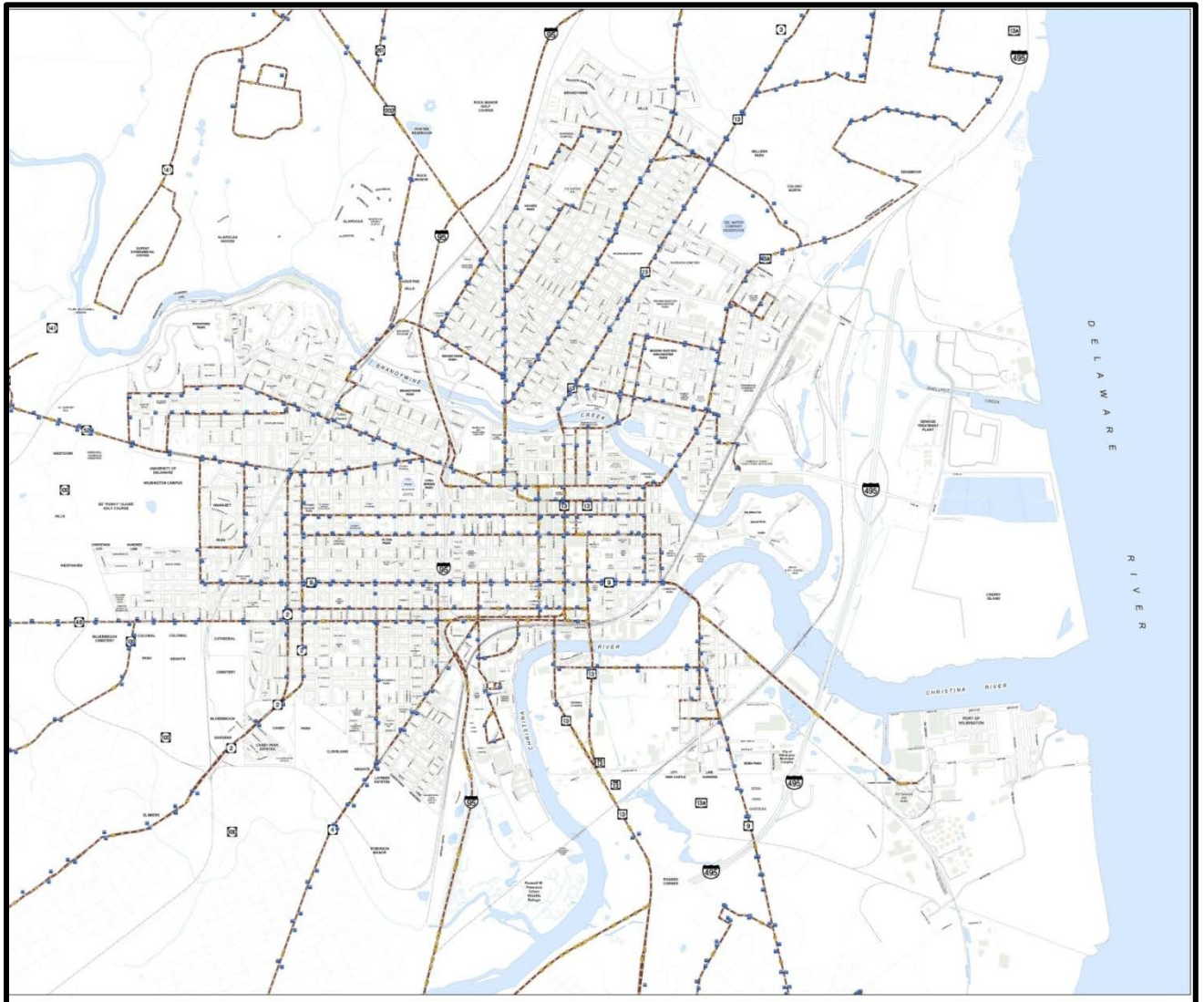
- **The Port is a full-service deepwater port and marine terminal** on the Christina and Delaware Rivers capable of handling all types of cargo with customized logistics. In calendar year 2009, the port handled 359 vessels of containerized, non-containerized cargo; dry bulk cargo; and liquid bulk petroleum cargo.
- **The port is the busiest terminal on the Delaware River.**
- **The Port ranks as the nation's leading gateway for imports of fresh fruit, banana, and juice concentrate, automobiles, steel, forest products, livestock (the East Coast's largest export port), petroleum, and other cargo.** The port has handled specialized cargo such as rocket parts from Ukraine and wind turbine blades from South America. It is also North America's leading perishable terminal, handling more than 200,000 TEUs (20-foot equivalent units) annually primarily for Dole Fresh Fruit Company and Chiquita Fresh North America. The Dole Food Company operations make the port the largest facility in the nation for banana imports.
- **The Port has the nation's largest cold-storage complex** with six temperature-controlled warehouses totaling 816,000 square feet. Distributors and companies use this facility as their northeastern and mid-Atlantic distribution center because of its good access to the market in these regions.
- **The Port provides quick access to I-495 and I-95**, the East Coast's interstate backbone.
- **The port has a 3,435-foot wharf face along the Christina River** with depths of 35–38 feet alongside, and the Delaware River portion of the port is being deepened to 42 feet. There are nine berths facing the Christina River, including seven general cargo berths, one petroleum berth, one floating roll-on/roll-off berth, in addition to an automobile berth facing the Delaware River
- **Cargo handling facilities** include two 50-ton capacity gantry cranes and one 75-ton capacity gantry crane.
- **The port has 50 acres of open space for storage, and 250,000 square feet of dry warehouse and storage space**, in addition to the refrigerated space noted previously.
- **The port is served by CSX and Norfolk Southern railroads.**
- **The port is a foreign trade zone**, although this capability is not used.
- **A refrigerated trailer hub** which accommodates multi-day parking of trucks with perishable cargo destined for transport is in close proximity to the port.



Figure 12 – Nonstop Destinations from New Castle County Airport  
Source: New Castle County Airport Website



Figure 13 – DART Bus Routes in Wilmington  
Source: DART Website



## Workforce

Strengths/Opportunities	Weaknesses/Issues										
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ The City’s 2013 labor participation rate is lower than the County, State, metro area, and nation, signaling a potential growth in the workforce. The following table shows the labor participation rates for the City, County, Metro area, state and nation. The labor participation rate is the percentage of working age residents who are in the workforce, i.e. employed or registered as unemployed seeking work.</li> </ul> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="background-color: #D9E1F2;">Wilmington City</th> <th style="background-color: #D9E1F2;">New Castle County</th> <th style="background-color: #D9E1F2;">Metro Area*</th> <th style="background-color: #D9E1F2;">Delaware</th> <th style="background-color: #D9E1F2;">U.S.</th> </tr> </thead> <tbody> <tr> <td>62.2%</td> <td>67.2%</td> <td>65.8%</td> <td>64.1%</td> <td>64.6%</td> </tr> </tbody> </table> <p>* Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area</p> <ul style="list-style-type: none"> <li>▪ The City is home to 19% of the County’s jobs (51,335 of the 263,280 County jobs).</li> <li>▪ Health Care/Social Assistance, Finance/Insurance/Real Estate, and retail trade are the dominant employment sectors (combined public and private) of City residents.             <ul style="list-style-type: none"> <li>– The percentage of residents employed in finance and health care professions exceed the national and regional averages. In the case of the Finance Sector, the difference is significant. (See Figure 14.)</li> </ul> </li> <li>▪ The City is home to 11.4% of the County’s civilian labor force. In February 2014 there were 275,518 New Castle County residents in the labor force, of which 31,156 resided in the City.</li> <li>▪ The leading occupations of City residents are in office administration (14.5%), management (10.8%), and architecture and engineering (9.8%).</li> <li>▪ Good incumbent worker retraining exists through Del Tech.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ The City is a regional job hub.</li> <li>▪ <b>Creation of more and better jobs in the City that match the skill base of City residents can reduce out-commuting.</b></li> </ul>	Wilmington City	New Castle County	Metro Area*	Delaware	U.S.	62.2%	67.2%	65.8%	64.1%	64.6%	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ The City’s current unemployment rate is much higher than the County, metro, State, and U.S. rates. It was higher in 2012 compared to State, County, metro area, nation. In 2000 it was closer to County, metro area and State averages. (See Table 6.)</li> <li>▪ The labor participation rate of county residents of working age is higher than the MSA, State and national rates, signaling a likely limited availability of additional County residents to be drawn into the workforce. Growth in the labor force will be dependent upon a growth in the County’s working age residential base and a dependence upon commuters from outside of the New Castle County.</li> <li>▪ The occupations with the lowest representation are building/grounds cleaning and maintenance (1.9%), farming (1.2%), community and social services (1.2%), business and financial operations (1.0%), and personal care/service (0.3%).</li> <li>▪ 85% of the jobs in the City are held by non-residents.</li> <li>▪ Most of the City’s residents work outside of Wilmington             <ul style="list-style-type: none"> <li>○ 27% of City residents work in the City. Of the 28,313 employed City residents, 7,568 work in the City.</li> <li>○ 73% work outside of the City.</li> <li>○ 48% of City residents work elsewhere at scattered locations in New Castle County</li> <li>○ 3% work in Kent or Sussex Counties, DE</li> <li>○ 22% commute out of State</li> </ul> </li> <li>▪ The percentage of residents employed in construction, educational services, and manufacturing (combined public and private sectors) are well below the County, regional, State and U.S. averages, indicating a imbalanced distribution compared to these benchmark areas. (See Table 7.)</li> <li>▪ Perceived, and real, crime and safety issues impede recruiting from outside the area.</li> </ul>
Wilmington City	New Castle County	Metro Area*	Delaware	U.S.							
62.2%	67.2%	65.8%	64.1%	64.6%							

<ul style="list-style-type: none"> <li>▪ Strong scientific capability in the NCC workforce can support future scientific and technology development in the City.</li> <li>▪ To attract more transferees and relocatees to live in the City, demonstration of the quality of the public schools is needed to more strongly counter the perceptions that they are not as good as the schools in neighboring Pennsylvania Counties.</li> <li>▪ Generate more jobs and working environments in the City and County that are attractive to the younger workforce to retain more University of Delaware graduates and attract younger residents. The generation of these kinds of jobs is as important, or more important, for attracting young professionals to live in the County as quality of life issues.</li> <li>▪ More working age residents are needed in the City to meet the growth in jobs within Wilmington and New Castle County, and to minimize the reliance on in-commuters.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The non-charter public schools in the County are perceived as lower quality than those in PA, especially those in Chester County. This perception drives many transferees and relocatees with school-aged children to live in PA rather than in Wilmington or the County.</li> <li>▪ A lack of “urban vibe” impedes recruiting of young professionals.</li> <li>▪ 85% of University of Delaware college grads leave the state after graduation, resulting in a loss of an educated labor pool for City and County employers, and potential, and a loss of young professionals.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ The City is a net importer of labor: 51,336 in-commuters vs. 20,745 out-commuters, according to data from the US Census On the Map database. The sources of the in-commuters are scattered over many jurisdictions, most of which are in New Castle County. The City’s labor shed is large, spanning much of the Philadelphia-Camden-Wilmington Metropolitan Area.             <ul style="list-style-type: none"> <li>○ 15% of the City’s workforce lives in the City, i.e. 15% of the jobs in the City are held by City residents. In February 2014 there were 51,335 jobs in the City, of which 7,568 were held by City residents. These job counts are primary jobs only, and do not include second or third jobs.</li> <li>○ 54% of the City’s workforce lives elsewhere in New Castle County.</li> </ul> </li> <li>▪ City and County employers are heavily dependent on a workforce living outside of the State, particularly Pennsylvania (especially Chester and Delaware Counties), and becoming increasingly so (growing from 26.8% to 32.8% of the workforce between 2002-2011) for the County. Currently 24% of Wilmington’s workforce resides out of state.</li> <li>▪ This dependence on PA workers poses a potential threat as job opportunities increase in Pennsylvania, allowing these commuters alternative employment choices with shorter commuting times.</li> <li>▪ The leading occupations of City residents are in office administration (14.5%), management (10.8%), , and architecture and engineering</li> </ul>
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	<p>(9.8%); the occupations with the lowest representation are building/grounds cleaning and maintenance (1.9%), farming (1.2%), community and social services (1.2%), business and financial operations (1.0%), and personal care/service (0.3%).</p> <ul style="list-style-type: none"> <li>Occupations of City residents that have had the most gains since 2000 are administration, health care/social assistance and retail trade; biggest losers were manufacturing, finance, and public administration.</li> </ul>
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**Table 6 – Comparative Unemployment Rates**

*Source: Nielson-Claritas*

Period	Wilmington City	New Castle County	Metro Area*	Delaware	U.S.
2000	4.4%	3.2%	3.8%	3.3%	4.0%
2012	10.1%	7.0%	8.5%	7.1%	8.1%
February, 2014	8.6%	6.1%	6.9%	5.9%	6.6%

\*Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area

*Source: U.S. Bureau of Labor Statistics*

**Table 7 – Percentage of Residents Employed in Three Key Industry Sectors**

*Source: Nielson-Claritas*

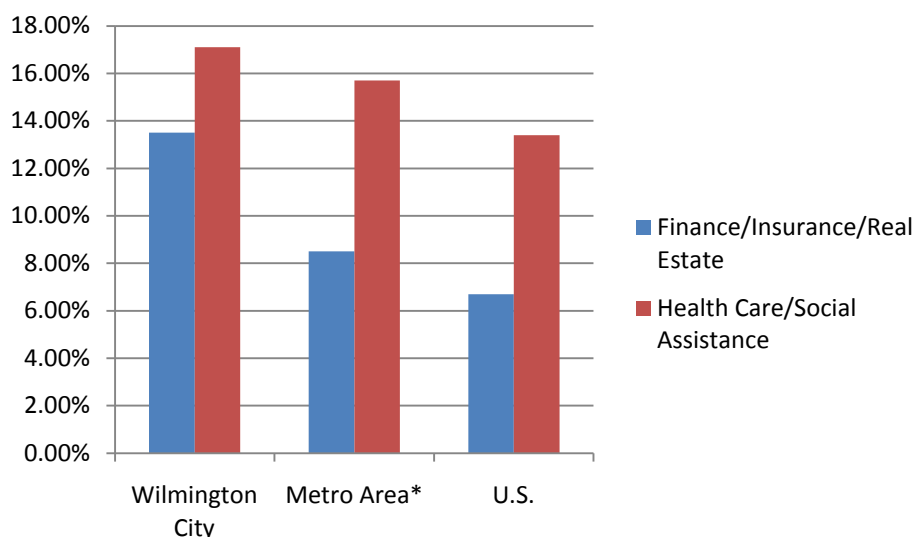
Industry Sector	Wilmington City	New Castle County	Metro Area*	Delaware	U.S.
Construction	3.9%	5.8%	5.4%	7.0%	6.5%
Educational Services (Private and Public Sectors)	6.6%	9.4%	10.4%	9.1%	9.5%
Manufacturing	6.6%	9.2%	9.7%	9.1%	10.5%

\*Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area

*Source: Nielsen-Claritas*

**Figure 14 – Percent of Residents Employed in Finance/Insurance/Real Estate and Health Care/Social Assistance**

Source: Nielson-Claritas



\*Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area - Source: U.S. Bureau of Labor Statistics

## Education

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ <b>The University of Delaware offers strong relationships with employers including internships and ongoing entrepreneurship program.</b></li> <li>▪ <b>DelTech Community College is highly ranked nationally; all programs have an Employer Advisory Board.</b></li> <li>▪ Wilmington University offers an opportunity for doctoral students to work on research with local businesses.</li> <li>▪ Del Tech, Wilmington, University of Delaware are working on an entrepreneurship degree from Del Tech.</li> <li>▪ Del Tech hosts the Diamond Challenge for high school students interested in exploring entrepreneurship</li> <li>▪ University of Delaware, through the Horn Program in Entrepreneurship under the Alfred Lerner College of Business Administration offers an undergraduate major or minor or an MBA concentration; UD also has the Venture</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ <b>The perceived quality of area’s public school systems is a major impediment to having more people move to the City and County.</b></li> <li>▪ The non-charter public schools are being hurt by the growth of charter schools.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ The perception of public school inadequacies may be overblown – the top four schools in state are located in the County.</li> <li>▪ Concern about quality of public schools results in 26-28% of students attending parochial schools.</li> <li>▪ The City of Wilmington high school dropout rate is over 60%.</li> <li>▪ State-wide, a high number of HS grads do not continue their education.</li> <li>▪ Education is a critical issue for the City’s, County’s and State’s economic development.</li> <li>▪ The State may need a plan or strategy for the development of charter schools.</li> </ul>

<p>Development Center, an entrepreneurial hub.</p> <ul style="list-style-type: none"><li>▪ There is an increased focus by businesses and the NCC Chamber on improving educational system performance.</li><li>▪ There is improving interschool and school-business relationships via an initiative by the New Castle Chamber of Commerce.</li><li>▪ Some school districts are seeing improvement in student performance.</li><li>▪ School districts maintain their systems are getting an undeserved poor reputation; they maintain that their quality is as good as the schools in PA.</li></ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"><li>▪ The public school districts may have to market themselves and have a public relations strategy, demonstrating their quality.</li></ul>	<ul style="list-style-type: none"><li>▪ A redesign of the school district service areas in the County may need to be addressed, allowing, among other things for the City to have its own high school.</li></ul>
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## Utilities (Public Water, Public Sewer, Electric Power, Natural Gas)

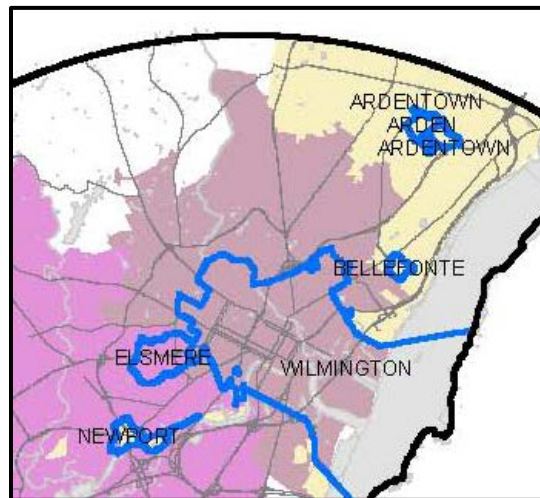
General Information	
Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>Utilities are generally a strength supporting economic development in Wilmington.</li> <li>The City has a Site Acquisition and Improvement Fund for Infrastructure Improvements.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>Improve the City’s competitiveness by providing summary information on available utilities on the city’s website.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>There are no summaries or appropriate links on utility availability on the City website.</li> <li>The City’s Site Acquisition and Improvement Fund for Infrastructure Improvements is currently unfunded.</li> <li>The City’s Water, Sewer and Stormwater Tax rates were increased by 5% for the 2015 Fiscal Year.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>Not applicable</li> </ul>

Public Water	
Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>The City of Wilmington has two water treatment facilities – the Porter and Brandywine Filter Plants (see Figure 15 showing the City’s water service area).</li> <li>Water from the Porter Filter Plant exceeded all federal and state quality standards in 2012 – the last year for which data was found on the City’s website.</li> <li>The Brandywine Filter Plant did not produce water in 2012 because it was being upgraded from conventional sand filtration to a membrane treatment technology for a 2013 restart.</li> <li>No deficiencies concerning water capacity, quality, pressure and flow, or costs were noted during interviews and focus groups.</li> <li>The <i>City of Wilmington Source Water Protection Plan 2020</i> indicates there is substantial additional withdrawal capacity from the Brandywine Creek watershed (31 MGD average daily withdrawal compared with a maximum 69.6 MGD maximum permitted withdrawal).</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>No convenient published source of information on Wilmington’s water treatment capacity and current usage could be found.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>Not applicable</li> </ul>



<ul style="list-style-type: none"> <li>The City’s Capital Improvements Program, fiscal Years 2014 – 2019 includes \$128.1 million for proposed water and sewer improvements.</li> </ul>	
<p><b>Opportunities</b></p>	
<ul style="list-style-type: none"> <li>Not applicable</li> </ul>	

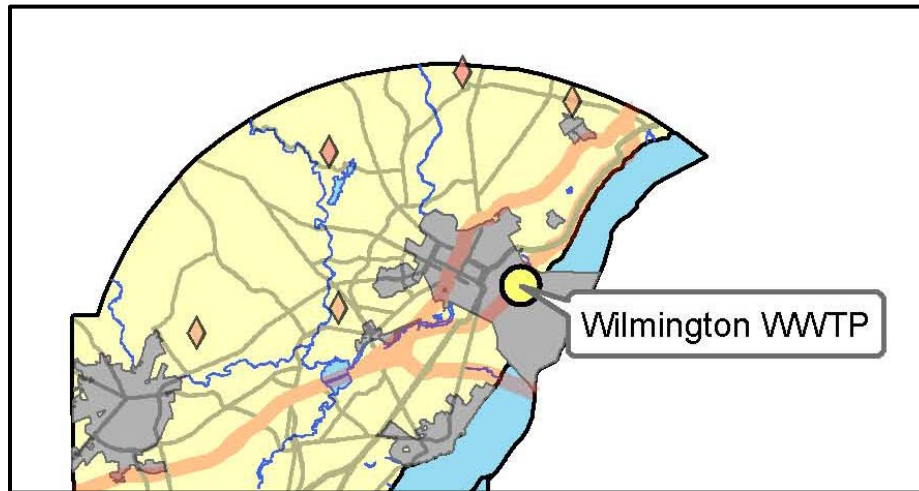
**Figure 15 – City of Wilmington Water Service Territory**  
*Source: New Castle County*



Public Sewer	
Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>The City of Wilmington’s Wastewater Treatment Plant serves the city and New Castle County north of the Chesapeake and Delaware Canal. It is a secondary treatment plant with a maximum capacity of 135 MGD and an average flow of 80 MGD.</li> <li>The City’s Capital Improvements Program, fiscal Years 2014 – 2019 includes \$128.1 million for proposed water and sewer improvements.</li> <li>No deficiencies concerning treatment capacity or usage costs were noted during interviews and focus groups.</li> <li>Pretreatment regulations appear to be common and no complaints were reported during research.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>Not applicable</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>No convenient published source of information on Wilmington’s wastewater treatment capacity and current usage could be found.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>Not applicable</li> </ul>

Figure 16 – Wilmington Wastewater Treatment Plant Service Territory

Source: Delaware Cleanwater Needs Assessment



Electric Power	
Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ The majority of New Castle County including Wilmington is covered by Delmarva Power &amp; Light (DP&amp;L – see Figure 17).</li> <li>▪ No complaints were reported during research about DP&amp;L electric costs or reliability.</li> <li>▪ Table 8 compares rates for commercial and industrial electric service in Delaware and nearby states and shows that Delaware’s rates are competitive.</li> <li>▪ The U.S. Energy Information Administration’s <i>Electric Power Monthly with Data from April 2014</i> report shows only one “Major Disturbances and Unusual Occurrences” event for DP&amp;L in 2014 through April (a 53 minute voltage reduction due to severe weather) and none in 2013, indicating a good level of power reliability.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ The availability of reliable and reasonably priced electric power can support many types of economic development projects.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ Not applicable</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ Not applicable</li> </ul>

Figure 17– Delmarva Power & Light Electric Service Territory  
 Source: DP&L Website



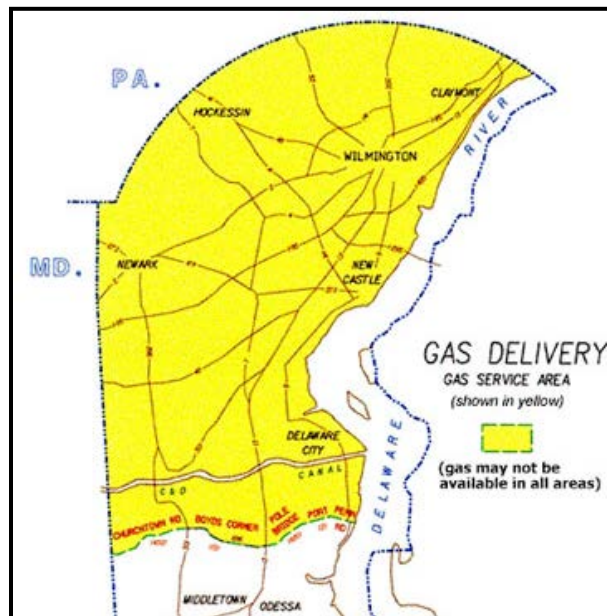
Table 8– Comparison Average Electric Rates (cents per Kilowatt hour)  
 Delaware and Nearby States - April 2014  
 Source: U.S. Energy Information Administration

State	Commercial Rate	Industrial Rate
Pennsylvania	9.60	7.48
<b>Delaware</b>	<b>10.79</b>	<b>8.37</b>
Maryland	11.27	9.23
Washington. DC	12.16	6.61
New Jersey	13.05	11.04
New York	14.90	6.09

Natural Gas	
Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>Delmarva Power provides natural gas service in New Castle County north of the Chesapeake and Delaware Canal (see Figure 18).</li> <li>No complaints were reported during research about Delmarva Power or Chesapeake Utilities’ natural gas costs, pressure or reliability.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>In March 2014, DP&amp;L filed necessary documentation for a 9.04% increase in monthly customer charges and commodity rates for medium and large volume service, effective July 1, 2014, that had previously been approved by the Public Service Commission.</li> </ul> <p><b>Issues</b></p>

<ul style="list-style-type: none"> <li>▪ DP&amp;L has an ongoing program for replacing aging gas infrastructure in New Castle County.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Natural gas supports Wilmington’s full utility service capability.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Not applicable</li> </ul>
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Figure 18 – Delmarva Power & Light Natural Gas Service Territory  
 Source: DP&L Website



## Telecommunications

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ <b>The County is served by a strong Internet backbone – 99% of the County is covered.</b> <ul style="list-style-type: none"> <li>• DE ranked #1 in the U.S. in % of households@ 4 MB download and upload speeds– 94%.</li> <li>• DE ranks #6 in 10 MB speed coverage – 48%.</li> <li>• DE ranks #5 in average connection speed 12.3 MB.</li> </ul> </li> <li>▪ New Castle County is the strongest in the state in terms of broadband and cellular capabilities.</li> <li>▪ Comcast is the primary provider – Verizon second – AT&amp;T is a growing market share and service.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ The availability of dark fiber, particularly in Wilmington, is not well known.</li> <li>▪ <b>Verizon policies limit broadband availability or result in large costs in some locations.</b></li> <li>▪ The City of Wilmington’s policies on extension of fiber is cited as causing difficulties for companies in the downtown or nearby that need fiber capability.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ Not applicable</li> </ul>

<ul style="list-style-type: none"> <li>▪ Fiber optics network including significant dark fiber connects the County to other regions.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Market the County’s superior telecom capabilities to businesses requiring such service.</li> </ul>	
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### Infrastructure (Other)

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ Wilmington’s FY 2014-2019 Capital Improvements Program includes a continuing series of utility and other infrastructure improvements.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Not applicable</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ <b>Recent structural problems with the I-495 bridge in Wilmington are both an accessibility and image problem for the City.</b></li> <li>▪ Inadequate and expensive parking in downtown Wilmington is a frequent complaint</li> <li>▪ The American Society of Civil Engineers (ASCE) reported in 2009 that DE had:               <ul style="list-style-type: none"> <li>○ \$283 million in drinking water needs through 2029</li> <li>○ \$222 million in wastewater infrastructure needs thorough 2029</li> <li>○ 185 of 862 bridges that were structurally deficient or functionally obsolete</li> <li>○ 36% or its roads in mediocre condition</li> <li>○ Road repair costs of \$257 per year per motorist</li> </ul> </li> <li>▪ While this data is for the entire state, it can be assumed that Wilmington, as the biggest City, is impacted by some of these conditions.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ The closure of the I-495 bridge earlier this year and news reports that it should have been closed sooner raise questions about the status of the City and surrounding area’s overall infrastructure.</li> </ul>

## Business Climate

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ The City administration is working to improve the City’s business climate and perception thereof by:                             <ul style="list-style-type: none"> <li>○ Having this Economic Development Action Plan</li> <li>○ Establishing an active and broadly representative Business Roundtable focused on improving the competitiveness of the City</li> <li>○ Having a goal of improving the effectiveness and efficiency of city permitting and licensing</li> </ul> </li> <li>▪ City staff members involved in the permitting and licensing process have stated a willingness to collaborate on finding ways to improve the process.</li> <li>• City Department of Licenses and Inspections provides a Design Review Checklist that summarizes major development requirements.</li> <li>• City offers a front end, informal review process to help shape project plans but does not review preliminary plans during kick-off meetings.</li> <li>• City attempts to render decisions quickly - can get variances in a month, subdivision approval in 6 weeks.</li> <li>▪ The State is reviewing and streamlining its regulatory process, particularly through DeIDOT (but still requires attention).</li> <li>▪ Delaware is seen as a highly unionized state, but companies can operate without becoming organized by a union and labor relations have been good. There have been no strikes in many years. (See Table 9 for information on union elections in Wilmington between 2006 and 2013.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Create an institutionalized process for reviewing and streamlining process that is dependable.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ <b>The City, County and State are all seen as less business friendly than they should be by many.</b></li> <li>▪ <b>Several sources stated that while City staffers say they are interested in improving the permit and approval process, efforts in the past have not resulted in any appreciable improvements.</b></li> <li>▪ <b>Wilmington codes are seen as very rigid – particularly the Fire Code</b> (which reflects state requirements, some of which are seen as unreasonable).</li> <li>▪ <b>The development regulations are not seen as being “simple, swift and certain”; rather, they are seen as “muddy”, out-of-date in some areas, and having a Design Review process that is perceived as very subjective with differences between projects and developers.</b></li> <li>▪ <b>The City’s development process is inadequately described on the City’s website</b></li> <li>▪ <b>OED frequently hears from the development/ construction industry that a plan will meet the International Building Code, but not the City of Wilmington’s. The City may have old codes that conflict with international codes.</b></li> <li>▪ <b>Wilmington’s image as a high crime area, whether based on actual statistics or misperception, hurts the City’s image as a good business climate.</b></li> <li>▪ The City is being hurt by a declining perception of DE as a desirable place to do business.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ <b>There is a need for the continued political will to change the City’s development regulations and procedures.</b></li> <li>▪ <b>Land use regulations and process need to be streamlined.</b></li> </ul>

<ul style="list-style-type: none"> <li>Create a broad City economic development team and provide team-building training.</li> </ul>	<ul style="list-style-type: none"> <li>Lack of Right-to-Work legislation is seen by some as discouraging manufacturing and other major opportunities, but the chance of the State becoming a right-to-work state is slight.</li> </ul>
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**Table 9– Wilmington Union Elections – 2006-2013**

*Source: National Labor Relations Board*

Company	Union	Date	Outcome
NARS of Delaware, LLC	Teamsters	11/21/06	Company
Diamond State Youth, Inc.	Communication Workers	1/31/07	Union
AT Systems Atlantic Garden	Special Police and Security Officers	2/19/08	Company
Ingleside Assisted Living	Food & Commercial Workers	10/21/08	Union
Foulk Manor South	Teamsters	3/13/09	Company
Advanced Student Transportation	Teamsters	11/17/09	Union
Diamond State Youth, Inc.	Communication Workers	2/25/2010	Company
Jones Lang LaSalle Americas, Inc.	Plumbers & Pipe Fitters	3/11/2010	Union
United Water Delaware	Utility Workers	7/6/2010	Company
Eastern Shore Services Inc.	Electrical Workers	1/24/2011	Union
Hart to Heart Ambulance Service	Teamsters	12/14/2011	Union
Eastern Shore Services Inc.	Electrical Workers	1/13/2011	Union
Garda World Security Corporation d/b/a Garda CL Atlantic, Inc.	Security, Police and Fire	3/10/2011	Company

## Taxes

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>Property in the City is subject to property taxes (both City and County) which are low (but this is a double-edged sword – see Weaknesses).</li> <li>Delaware’s gasoline tax of 23¢ per gallon has not been increased in nearly 20 years.</li> <li>Table 10 shows FY 2013-2014 rates on commercial and industrial property in Wilmington.</li> <li>Corporate net income tax rate is 8.7%.</li> <li>There is no tax on equipment.</li> <li>There is no sales tax.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>Not applicable</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li><b>Property taxes are too low because of the State assessment policy using 1983 Fair Market Values.</b></li> <li><b>The City’s wage tax puts it at a competitive disadvantage with other Delaware locations as well as with some other states.</b></li> <li>State Gross Receipts Tax discourages the location of larger facilities in DE</li> <li>Both the City’s Property Tax and Water, Sewer and Stormwater Tax rates were increased by 5% for the 2015 Fiscal Year.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>Someone must lead an effort to revise the state’s property valuations.</li> <li>The City’s Wage and Net Profits Tax is the single largest revenue source to the City, accounting for nearly \$65 million (43%) of the total \$151.2 million FY 2015 General Fund budget.</li> </ul>

**Table 10– City of Wilmington FY 2013-2014 Tax Rates**  
*Sources: City of Wilmington FY 2015 Budget Information and  
 New Castle County 2013-1014 Tax Year (Residential and Commercial Rates)  
 from New Castle County Website*

Commercial Real Estate Assessment Rate	Municipal Tax (per \$100) FY 2015	County Tax (per \$100) FY 2014	School District (per \$100) FY 2014	Total Property Tax (per \$100)
100% of the Fair Market Value as of July 1, 1983	\$1.855	TRS1 - \$2.5721	Brandywine – \$2.1785	To be calculated when new County and School District tax rates are available (estimated July 21 <sup>st</sup> )
		TRS2 - \$2.1346	Red Clay – \$1.741	
		TRS3 - \$2.3905	Christina – \$1.997	
		TRS4 - \$2.0996	Colonial – \$1.706	

Note: FY 2014-2015 County and School District tax rates were not available at the time this Table was prepared.

### Public Services/Facilities

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>There is a full range of services and facilities available to the public, as would be expected in an area of Wilmington and New Caste’s size and diversity.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>Not applicable</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>Not applicable</li> </ul>

### Business Support Services

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>The area’s population size and density means you can find anything you need in 20-30 minutes.</li> <li>There are large businesses to support small businesses through a variety of alliances and vendor-supplier relationships.</li> <li>The County Chamber is bringing the Young Entrepreneur Academy program to Delaware.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>Taking better advantage of Select Greater Philadelphia would be helpful in stimulating economic development in the long run.</li> <li>There is a need for a coordinated marketing effort.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>There is no summary of available services to support business development.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>The City and County are impeding the area’s economic development competitiveness by having an inadequate website for business development and attraction. These websites also need to have coordinated information.</li> </ul>



## Economic Development Support Services

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ The City has an Office of Economic Development with a staff of seven.</li> <li>▪ The City of Wilmington has an aggressive economic development program which it is seeking to improve through this project.</li> <li>▪ The New Castle County Chamber of Commerce is a strong ally of the City’s economic development efforts.</li> <li>▪ As shown in more detail in the section on Financing and Incentives, the City offers an array of economic development incentive and assistance programs (see Table 11) including: <ul style="list-style-type: none"> <li>○ A multi-year, discretionary budget Strategic Fund for job creation projects or small business loans</li> <li>○ A Statutory Head Tax Abatement</li> <li>○ A Statutory Property Tax Abatement</li> <li>○ A discretionary Payment in lieu of Property Tax Abatement</li> <li>○ Site Acquisition and Improvement Fund–Infrastructure Contribution Agreements</li> <li>○ An “Upstairs Fund”</li> </ul> </li> <li>▪ The City offers a Micro Loan Training Program for persons interested in developing small businesses.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Consider creating a unified County-Municipal Economic Development Office.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ <b>The majority of information typically sought by business prospects and site selection consultants is not available from or linked to the Economic Development portion of the City’s website.</b></li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ Not applicable</li> </ul>

## Entrepreneurship Support Services

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ <b>DelTech</b> Community College has created a One Million Cups program at its Wilmington Campus (a Kauffman Institute initiative).</li> <li>▪ <b>The University of Delaware Entrepreneurship program.</b></li> <li>▪ The New Castle County Vo-Tech School District</li> <li>▪ Del Tech, Wilmington, and UD are working on an entrepreneurship degree from Del Tech.</li> <li>▪ Del Tech hosts the Diamond Challenge for high school students interested in exploring entrepreneurship.</li> <li>▪ UD, through the Horn Program in Entrepreneurship under the Alfred Lerner College of Business Administration offers an undergraduate major or minor or an MBA concentration; UD also has the Venture Development Center, an entrepreneurial hub.</li> <li>▪ There are a number of business plan competitions in the County.</li> <li>▪ There are large businesses to support small businesses through a variety of alliances and vendor-supplier relationships.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ <b>Engage students and younger residents more in the economic development process.</b></li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ <b>There is fragmented information about availability of programs and services for small businesses.</b></li> <li>▪ There is inadequate space to support business start-ups and small business growth.</li> <li>▪ There is inadequate venture capital and angel funding sources in the County.</li> <li>▪ Only one micro-lender exists in the County.</li> <li>▪ DE is not competitive with PA in supporting small business growth.</li> <li>▪ Startup guidance assistance to the Hispanic community needs more attention.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ PA MD, NJ will steal companies once they develop in NCC through support programs, incentives and other factors.</li> <li>▪ Blogs show that DE is not seen as a great place for entrepreneurship.</li> </ul>

## Financing & Incentives

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ <b>The City is the home of several large and active banking institutions.</b> <ul style="list-style-type: none"> <li>○ Many of these institutions have Community Reinvestment Act requirements to invest in their service territory</li> </ul> </li> <li>▪ There are SBA 504 lenders serving the City.</li> <li>▪ The City offers a variety of incentive and assistance programs that are summarized in Table 11.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ The state has a small and conservative incentive program.</li> <li>▪ There is inadequate venture capital and angel funding sources available.</li> <li>▪ There is only one micro-lender.</li> <li>▪ There is a lack of targeted incentives to support key business sectors and target industries.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ Compliance with new federal regulations is reducing banks' willingness to lend, particularly for start-ups.</li> </ul>

<ul style="list-style-type: none"><li>▪ Eligible projects in the City can qualify for incentives or assistance from DEDO including:<ul style="list-style-type: none"><li>○ State Small Business Credit Initiative (SSBCI)</li><li>○ Delaware Access Program</li><li>○ New Jobs Infrastructure Program</li><li>○ Delaware Rural Irrigation Program (DRIP)</li><li>○ Brownfield Assistance Program</li><li>○ State funding matches training expenditures 1:1 up to \$100,000 annually</li></ul></li><li>▪ New or renovated commercial or manufacturing projects located within the corporate limits of the City of Wilmington are eligible to receive a partial tax exemption on the increase in the New Castle County portion of property tax attributable to the new construction. The cost of new construction and/or the cost of site acquisition and construction must exceed fifty thousand dollars (\$50,000.00).</li></ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"><li>▪ Create a broad purpose “closing fund” to support new business creation and product/services development.</li><li>▪ Make better use of Community Reinvestment Act (CRA) capabilities.</li></ul>	
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**Table 11– Summary of City of Wilmington Incentive Programs**

*Source: Wilmington Office of Economic Development*

Incentive	Intent	Details
Strategic Fund (multi-year discretionary)	Job creation incentive grants to companies based on wage tax, advanced under a loan to grant structure with claw back	<ul style="list-style-type: none"> <li>• Strategic Fund – modeled after DE’s</li> <li>• Year over year, discretionary by staff after Council appropriates funds</li> <li>• Have had 5 infusions over 13 years</li> <li>• Sits in City capital program</li> <li>• Used for grants for job producing projects – recruit or retain (job creation or keep company at end of lease term –if stay 10 years)</li> <li>• Structure as loan converted to grant based on performance</li> <li>• Clawback provisions</li> <li>• Based on payroll</li> <li>• Do discounted cash flow based on wage taxes, wage taxes go into general fund</li> <li>• Generates about 4 to 1 return. Works better with larger size business</li> </ul>
Strategic Fund (multi-year discretionary)	Small business loans with partial principle forgiveness	Forgive part of principle every year after 5 years operation
Statutory Head Tax Abatement	100% for 5 years – was rolling, but may be changed to fixed date	\$15/month on more than 5 employees (first 5 exempt)
Statutory Property Tax Abatement on improved value	Encourage capital investment in improvements – when CO is approved – must be above threshold 10 years, 5 @ 100%, then step-down 20% per year	1/3 of city revenue from property taxes Can abate improved value without eroding base; statutorily available city-wide but different zones. Must apply for it. Only applies to City taxes – not county or school
Payment in lieu of Property Tax Abatement (discretionary)	Same as previous	Can do up-front cash payment based on discounted cash flow analysis if waive abatement - only works for bigger deals

**WILMINGTON, DE SWOT ANALYSIS**

Incentive	Intent	Details
Site Acquisition and Improvement Fund– Infrastructure Contribution Agreements	Support private investment by putting in necessary infrastructure Functions as gap financing – no minimum threshold	Capital/presently unfunded Encouraging city to not legislate this too much Project needs to quantify/justify the gap Can use for land purchase with Council approval
Upstairs Fund	One-off program to encourage redevelopment of upper floors on Market Street between 2 <sup>nd</sup> and 9 <sup>th</sup> Streets	Capital/presently unfunded Launched in 2009, closed in 2013 \$12 million; \$3 million went to Queen Theater

Notes:

Wilmington’s definition of a small business is different from the federal definition – larger scale

OED is the intake point and then routes to right agency for help

- Work with WEDCO (Wilmington ED Council) – get funding from City, EDA, SBA and First State Community Loan (state-wide)
- Can help someone with idea but no business plan – set up with state SBDC – get consultant assigned

Abatement of wage taxes not done - no other City in NCC charges wage tax – Wilmington needed to do to have adequate revenue – has turned out to be a problem – creates competition with County – need to merge City and County

In city, 50% of property taxes goes to the city, 45% to the school system, 5% to New Castle County

## Available Sites and Buildings

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ <b>The City has a substantial amount of vacant and available property with a 22.5% office vacancy rate (1.6 million SF)</b> (source: CBRE <i>1<sup>st</sup> Qtr 2014 Office Market Overview</i>) <b>and an 8.9% industrial office rate (2.225 million SF)</b> (source: Cushman &amp; Wakefield <i>Market Industrial Snapshot, Northern Delaware, 4<sup>th</sup> Qtr 2013</i>).</li> <li>○ Of the office space, in the CBD 40.6 % is classified as Class B space and 65.5% is Class C space.</li> <li>▪ Class B and C office real estate in Wilmington offers some competitive pricing advantages over competing areas to the north and in the rest of northern New Castle County (see Table 12).</li> <li>▪ Downtown Visions is working on an inventory of available space in their service territory during the summer 2014.</li> <li>▪ FTZ 99 exists at the Port of Wilmington. It has been used by several companies but is an underutilized resource.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Prepare and promote a master list of available properties in the City.</li> <li>▪ Promote the upgrading or redevelopment of properties along Routes 9 and 13 and in other major economic development locations in the City.</li> <li>▪ Increase use of the FTZ at the Port of Wilmington.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ <b>The City has no conveniently available inventory of available space or land for construction.</b></li> <li>▪ It is difficult to obtain information on available sites and buildings from DEDO’s Site Inventory portion of website.</li> <li>▪ There is an inadequate supply of Class A office space in the City (defined by BOMA as “Most prestigious buildings competing for premier office users with rents above average for the area. Buildings have high quality standard finishes, state of the art systems, exceptional accessibility and a definite market presence.”</li> <li>▪ Wilmington has substantial competition from vacant office space in its surrounding suburban market with 2+ million SF available (source: CBRE <i>1<sup>st</sup> Qtr 2014 Office Market Overview</i>).</li> <li>▪ From 2011 through the first Quarter of 2014, Wilmington has had a net loss of 201,000 SF of occupied office space (see Table 13).</li> <li>▪ Available industrial space in northern New Castle County including Wilmington is more expensive than available industrial space in the suburban Philadelphia or Southern New Jersey marketplaces (see Table 12).</li> <li>▪ There is a limited space to support business start-ups and small business growth.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ The lack of conveniently available information on commercial and industrial real estate in the City is an impediment to the City’s economic development marketing and competitiveness.</li> </ul>

**Table 12 – Comparative Office and Industrial Rental Rates  
Wilmington and Other Selected Locations – 1<sup>st</sup> Qtr 2014**

Sources: CBRE 1<sup>st</sup> Qtr 2014 Office Market Overview; Cushman & Wakefield Market Industrial Snapshot, Northern Delaware, 4<sup>th</sup> Qtr 2013; ; Cushman & Wakefield Market Office Snapshot, Southern New Jersey, 1<sup>st</sup> Qtr 2014

Location	Class A	Class B	Class C	All Classes Average
<b>Office Space</b>				
Wilmington CBD	\$26.41	\$19.50	\$16.16	
No. New Castle County	\$22.34	\$21.03	\$17.09	\$21.95
Philadelphia CBD	\$27.65			\$26.06
Suburban Philadelphia	\$25.99			\$24.30
So. New Jersey	\$20.92			\$19.21
<b>Industrial Space</b>	<b>Manufacturing</b>			
No. Delaware	\$7.03			
Suburban Philadelphia	\$5.46			
So. New Jersey	\$2.70			

**Table 13 – Summary Wilmington and Surrounding Suburban Market Office Space Availability  
2011 – 1<sup>st</sup> Qtr 2014**

Source: CRBE 1<sup>st</sup> Qtr 2014 Office Market Overview

Year	Vacancy Rate (%)		Space Absorption (SF)	
	Wilmington CBD	Suburban Market	Wilmington CBD	Suburban Market
2011	19.7	20.4	-23,000	-8,000
2012	21.1	18.4	-99,000	+ 161,000
2013	22.3	18.1	-118,000	+ 190,000
2014-Q1	22.5	21.8	+39,000	-228,000
<b>Total</b>			<b>-201,000</b>	<b>+115,000</b>

## Quality of Life

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>There is available housing for young people, with some options; Trolley Square is one.</li> <li>There is good local health care through the Christiana Health Care System and proximity to major facilities in Philadelphia.</li> <li>There are extensive recreational, arts, culture, and historic opportunities.</li> <li>Collectively, the value of the City’s housing is lower than the County’s. The median home (e.g. house or condo) value is 71% of the County’s median (\$169,733 vs. \$239,914).</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li><b>There is a misperceived crime and public safety issue in downtown Wilmington that taints the County as a whole.</b> The City is listed on some national real estate and other data bases as being a high crime small city, as defined as having a population below 75,000. The City’s population is 71,400. However, with a population above 75,000 the city would be considered a middle sized city and its comparative ranking on crime rate would be lower, and more in line with the other mid-sized cities.</li> </ul>

<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Not applicable</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>The City, however, does have a high crime rate, as measured by property and violent crimes versus the County, State and nation. (See Table 14.)</b></li> <li>▪ <b>The County is missing the level of urban environment sought by many younger workers.</b></li> <li>▪ <b>The amount of affordable housing may not be enough to accommodate an influx of younger residents.</b></li> <li>▪ A significant contributor to the crime problem is a growing heroin use and addiction, as it is on the East Coast.</li> <li>▪ Wilmington’s cost of living is higher than Philadelphia or Baltimore (DEDO COLI calculator).</li> <li>▪ The City’s high number of vacant homes is a contributory factor to the City’s high crime rate, and adversely affects the appearance of the City when they are not maintained.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ There is a significantly different quality of life according to socio-economic groups, particularly in Wilmington.</li> <li>▪ The drop in the County’s crime rate will make the County more attractive to businesses and residents over the City. The drop in the County’s rate puts attention on the City, with a rising crime rate.</li> <li>▪ The City’s high crime rate and perception of poor public schools (also a County issue), are two of the most critical issues facing the City. Both must be addressed.</li> </ul>
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**Table 13 – Comparative Crime Rates 2012**

*Source: FBI*

Category	Wilmington City	New Castle County	Delaware	U.S.
Property Crimes per 100,000 People 2012	5,304.6	1,154.8	3,340.9	2,859.2
Violent Crimes per 100,000 People 2012	1,703.5	197.1	547.4	386.9



## Image and Visibility

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ The Greater Wilmington CVB is completing a branding initiative.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Expand DE’s “shoreline image” to include inland opportunities.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ <b>The City has a reputation as not business-friendly.</b></li> <li>▪ A unified brand is missing that cuts across all facets of economic development.</li> <li>▪ Corporate real estate programs have redlined DE.</li> <li>▪ The City, County and State’s reputation as the chemical capital of the world is now a liability.</li> <li>▪ There are different goals and a need for greater cooperation and communication among the different community sectors and groups active in economic development within the County.</li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>▪ The role of the County within the Philadelphia metro area needs to be understood and leveraged to the County’s advantage.</li> </ul>

## Planning & Development

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>▪ The City has been active in providing funding or other support that helps development; without this support, many projects are financially infeasible.</li> <li>▪ The timeframe to obtain many types of decisions (e.g., variances, subdivision approvals) is considered reasonable.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>▪ Create a solutions-oriented, customer service mindset within City Hall that focuses on facilitating rather than regulating the development process.</li> <li>▪ Focus future development in existing density corridors and identified opportunity areas in addition to the downtown.</li> <li>▪ Conduct team-building program to make rules enforcers part of the economic development team.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ <b>Wilmington codes are seen as very rigid – particularly the Fire Code</b> (which reflects state requirements, some of which are seen as unreasonable).</li> <li>▪ <b>The City’s development regulations are not seen as being “simple, swift and certain”; rather, they are seen as “muddy”, out-of-date in some areas, and having a Design Review process that is perceived as very subjective with differences between projects and developers.</b></li> <li>▪ <b>Developers believe there should be more interaction between the development community and the City’s Department of Licenses and Inspections.</b></li> <li>▪ Repurposing of existing buildings is very difficult in Wilmington, particularly taller ones, because of fire code issues.</li> </ul>

	<p><b>Issues</b></p> <ul style="list-style-type: none"> <li>Continual attention should be paid to streamlining land use and other development regulations.</li> </ul>
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**Leadership & Politics**

Strengths/Opportunities	Weaknesses/Issues
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>There is general agreement that the Mayor’s Business Roundtable provides a good foundation for a public-private partnership that can collaboratively work to improve the City and its economic development competitiveness.</li> </ul> <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>Obtain official acceptance and/or endorsement of this Economic Development Action Plan by the City Council, Business Roundtable, New Castle County Chamber of Commerce and other allies.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li><b>The City’s various regulatory agencies and staffs do not function as an effective economic development team.</b></li> </ul> <p><b>Issues</b></p> <ul style="list-style-type: none"> <li>Leadership is required to meld the various City departments and agencies that come in contact with the economic development process into an effective team.</li> </ul>

## ECONOMIC DEVELOPMENT STRATEGY POTENTIAL INITIATIVES

Table 14 provides an initial list of possible initiatives for the City’s Economic Development Plan. The list is presented in alphabetical order and does not imply any prioritization. This list will be refined through a process of combination, prioritization, elimination, or other necessary actions by the City and consulting team to arrive at the final list for inclusion as the recommended “action agenda” items in the Strategy. These will be selected based on the assessment of their anticipated results, cost-effectiveness, resource requirements, support, and other necessary factors.

In any planning process, there are always more good ideas than available resources. Those initiatives are not included in the initial Action Agenda can serve as a “stockpile” of ideas for future consideration and possible implementation.

**TABLE 14- Initiative Ideas for Wilmington**

Initiatives		
#	Short Name	Brief Description
1	Business Communications Program	Establish a regular communications program by OED with businesses in the City.
2	Career Fair	Create a more robust Career Fair concentrated on 9 <sup>th</sup> grade students.
3	Career Pathways	Work with major employers in the City to identify available career pathways and the necessary educational or other steps along those pathways. In particular, identify “fast track” pathways for Veterans
4	Closing Fund	Create a “closing fund” to support new business creation, retention, expansion, and recruitment by providing funding for necessary business development actions including infrastructure funding for desired projects.
5	Cost Comparison Study	Prepare a Cost of Doing Business Comparison between a Wilmington location and other areas that are typical competitors. Where Wilmington has a cost advantage, promote this in the City’s marketing. Where there are cost disadvantages, identify ways to reduce them.
6	Crime Reduction	Continue aggressive efforts both to reduce crime in the City and improve the City’s image as a safe place to live and work.
7	Directory of Small Business Services	In association with New Castle County and other allies prepare, broadly disseminate, promote, and maintain a Directory of Small Business Services. Publish in English and Spanish.
8	Economic Development Team Building	Create and use a team-building program such as the MetroHartford Alliance’s “Economic Development for Public Officials” to meld all City staff that comes into contact with the economic development process into a more effective team.
9	Economic Development Website	Create a City Economic Development website separate from the more general government City website that provides

Initiatives		
#	Short Name	Brief Description
		the information business prospects and site location consultants typically expect to find this way (whether for recruitment, retention/ expansion, or start-up purposes)
10	General Media Image and Information Enhancement	<p>Seek to counter the negative news being publicized in the News Journal about crime. Monitor the news and blogs on this subject and develop the influence to have coverage that is more in perspective.</p> <p>Encourage the development of an alternative newspaper that addresses the attitudes and needs of a younger, hipper population, such as Burlington VT's <i>Seven Days</i>, that serves the entire county and beyond.</p>
11	Jobs Bank	Work with the Delaware Workforce Investment Board and/or other appropriate allies to create, promote, and maintain a Jobs Bank showing jobs available in the City and requirements to obtain those jobs.
12	Marketing Wilmington's Multi-Modal Capability	Because of its Interstate Highways, rail, port, and proximity to both the New Castle County and Philadelphia International Airports, position the City as a multi-modal "distribution" hub for both products and services.
13	Master Marketing Program	Continue efforts to meld the multiple market efforts focused on various aspects of Wilmington and its economy into a Master Marketing Plan and implementation efforts so that marketing resources are more cost effective and generate better results.
14	One-Stop Shopping	Build on the City's current front end, informal review process to develop a One-Stop Shopping approach to providing guidance to developers on proposed projects.
15	Permit and Approval Process Task Force	Develop and maintain a City Permit and Approval Process Task Force to identify ways to make the Wilmington's development process more simple, swift and certain. This task force should be a partnership of City staff, boards and commissions and private sector developers, contractors, architects and engineers. City staff and boards and commissions would be permanent members, while private sector representatives would regularly change to provide fresh opinions.
16	Real Estate Inventory	Prepare and maintain an inventory of available commercial and industrial buildings and sites in the City. Make this inventory available on the City's Economic Development Website.
17	TOD	Develop a plan for increasing transit oriented development in Wilmington.

Initiatives		
#	Short Name	Brief Description
18	Unified Economic Development Program	Consider creating a unified County-Municipal Economic Development Office.
19	Utilities and Telecommunications Summary	Prepare and maintain a summary of public water and sewer, electric power, natural gas and telecommunications capabilities in the City. Make this information available on the City's Economic Development Website.
20	Vacant Building Task Teams	Create task teams comprised of all appropriate City staff and private sector development volunteers to evaluate vacant buildings, market opportunities suitable for the buildings and location, and steps that should be taken to stimulate building reoccupancy.
21	Public Schools Marketing	Develop an ongoing initiative by the school districts serving the City to develop a marketing program by which the benefits and assets of the districts are highlighted and publicized.
22	Public School Redistricting	Address the potential for redistricting the schools serving the City and County and revisit the possibility of consolidation if there will be an improvement in quality and/or a reduction in cost.
23	Young Entrepreneurs and Professionals	Prepare a competitive analysis comparing Wilmington with other areas of comparable size in terms of characteristics, programs and services leading to the successful retention and recruitment of young residents. Create a think tank (or advisory/resource group) of young people – both young professionals and others who aren't professionals yet. This group would be best if independent of any established entity, such as the County or Chamber.

# EXHIBIT: STATISTICAL BACKGROUND DATA WILMINGTON, DELAWARE

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**EXHIBIT: STATISTICAL BACKGROUND DATA  
WILMINGTON, DELAWARE**

26 Where Wilmington City residents work 2011

# EXHIBIT 1: DEMOGRAPHIC CHARACTERISTICS

Source: U.S. Census Bureau, Nielson-Claritas Inc.

	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Population (Source: U.S. Bureau of the Census, Nielson-Claritas, Inc.)</b>					
2000 Census	72,468	500,265	5,687,140	783,598	281,421,942
2013	71,377	545,911	6,022,170	917,761	314,861,807
2018	72,638	560,475	6,109,258	951,813	325,322,277
Change 2000 - 2013	-1.5%	9.1%	5.9%	17.1%	11.9%

<b>Percent Minority (Source: U.S. Bureau of the Census, Nielson-Claritas, Inc.)</b>					
2000 Census	67.9%	29.3%	29.4%	27.5%	30.9%
2013	72.9%	40.5%	36.5%	36.3%	37.7%
2018	73.8%	43.9%	38.7%	38.8%	39.8%

<b>Distribution by Age Group (2000)</b>					
<i>(Source: Nielson-Claritas, Inc.)</i>					
0-17	18,726	124,746	1,443,295	194,598	72,293,178
18-34	18,975	125,431	1,283,828	184,164	67,034,990
35-54	20,160	150,488	1,708,126	231,576	82,826,319
55-64	5,501	41,687	493,074	71,513	24,275,603
65-74	4,399	30,916	390,425	56,440	18,390,870
75 and over	4,707	26,997	368,392	45,307	16,600,982

<b>Percent Distribution by Age Group</b>					
<b>2000 Census (Source: Nielson-Claritas, Inc.)</b>					
0-17	25.8%	24.9%	25.4%	24.8%	25.7%
18-34	26.2%	25.1%	22.6%	23.5%	23.8%
35-54	27.8%	30.1%	30.0%	29.6%	29.4%
55-64	7.6%	8.3%	8.7%	9.1%	8.6%
65-74	6.1%	6.2%	6.9%	7.2%	6.5%
75 and over	6.5%	5.4%	6.5%	5.8%	5.9%



# EXHIBIT 1: DEMOGRAPHIC CHARACTERISTICS

Source: U.S. Census Bureau, Nielson-Claritas Inc.

	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Distribution by Age Group (2013)</b>					
<i>(Source: Nielson-Claritas, Inc.)</i>					
0-17	17,183	124,399	1,378,708	207,628	74,731,227
18-34	18,509	130,267	1,382,141	206,135	72,541,740
35-54	19,018	151,569	1,646,827	244,306	84,782,170
55-64	7,956	67,605	764,275	118,414	38,944,750
65-74	4,722	40,667	459,934	81,986	24,703,850
75 and over	3,989	31,404	390,285	59,292	19,158,070

<b>Percent Distribution by Age Group (2013)</b>					
<i>(Source: Nielson-Claritas, Inc.)</i>					
0-17	24.1%	22.8%	22.9%	22.6%	23.7%
18-34	25.9%	23.9%	23.0%	22.5%	23.0%
35-54	26.6%	27.8%	27.3%	26.6%	26.9%
55-64	11.1%	12.4%	12.7%	12.9%	12.4%
65-74	6.6%	7.4%	7.6%	8.9%	7.8%
75 and over	5.6%	5.8%	6.5%	6.5%	6.1%

<b>Distribution by Age Group (2018)</b>					
<i>(Source: Nielson-Claritas, Inc.)</i>					
0-17	17,349	124,907	1,369,151	213,040	76,231,067
18-34	17,724	130,355	1,382,824	210,055	73,198,364
35-54	18,913	145,789	1,554,812	235,360	82,648,703
55-64	8,751	75,256	833,762	128,975	42,246,457
65-74	5,732	50,110	561,281	98,642	30,124,562
75 and over	4,169	34,058	407,428	65,741	20,873,124

## **EXHIBIT 1: DEMOGRAPHIC CHARACTERISTICS**

Source: U.S. Census Bureau, Nielson-Claritas Inc.

	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Percent Distribution by Age Group (2018)</b>					
<i>(Source: Nielson-Claritas, Inc.)</i>					
0-17	23.9%	22.3%	22.4%	22.4%	23.4%
18-34	24.4%	23.3%	22.6%	22.1%	22.5%
35-54	26.0%	26.0%	25.5%	24.7%	25.4%
55-64	12.0%	13.4%	13.6%	13.6%	13.0%
65-74	7.9%	8.9%	9.2%	10.4%	9.3%
75 and over	5.7%	6.1%	6.7%	6.9%	6.4%

### **Projected Change in Age Distribution (2013-2018)**

*(Source: Nielson-Claritas, Inc.)*

0-17	166	508	-9,557	5,412	1,499,840
18-34	-785	88	683	3,920	656,624
35-54	-105	-5,780	-92,015	-8,946	-2,133,467
55-64	795	7,651	69,487	10,561	3,301,707
65-74	1,010	9,443	101,347	16,656	5,420,712
75 and over	180	2,654	17,143	6,449	1,715,054

### **Projected Percent Change in Age Distribution (2013-2018)**

*(Source: Nielson-Claritas, Inc.)*

0-17	1.0%	0.4%	-0.7%	2.6%	2.0%
18-34	-4.2%	0.1%	0.0%	1.9%	0.9%
35-54	-0.6%	-3.8%	-5.6%	-3.7%	-2.5%
55-64	10.0%	11.3%	9.1%	8.9%	8.5%
65-74	21.4%	23.2%	22.0%	20.3%	21.9%
75 and over	4.5%	8.5%	4.4%	10.9%	9.0%

## **EXHIBIT 1: DEMOGRAPHIC CHARACTERISTICS**

Source: U.S. Census Bureau, Nielson-Claritas Inc.

	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Median Age (Source: Nielson-Claritas, Inc.)</b>					
2000 Census	33.8	35.0	36.2	36.0	35.3
2013	35.0	37.6	38.3	39.0	37.5
2018	36.3	38.6	39.1	39.7	38.3

**Median Household Income**  
(Source: Nielson-Claritas, Inc.)

2000 Census	\$35,139	\$53,444	\$48,454	\$47,670	\$42,728
2013	\$36,054	\$62,601	\$59,771	\$57,457	\$49,297
2018	\$37,937	\$65,286	\$62,840	\$59,674	\$49,815
Change '13 - '18	5.2%	4.3%	5.1%	3.9%	1.1%

**Household Income Distribution (2013)**  
(Source: Nielson-Claritas, Inc.)

Households	28,690	200,753	2,225,745	344,093	117,490,413
Less than \$35,000	14,271	57,617	709,346	105,513	43,296,444
Between \$35,000 and \$75,000	8,015	63,873	673,948	117,770	38,702,064
Greater than \$75,000	6,404	79,263	842,451	120,810	35,491,905

**Persons Living Below Poverty Level 2008-2012**  
(Source: US Census)

Percentage	23.5%	10.7%	N/A	11.5%	14.9%
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## **EXHIBIT 1: DEMOGRAPHIC CHARACTERISTICS**

Source: U.S. Census Bureau, Nielson-Claritas Inc.

	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Percent Household Income Distribution (2013)</b>					
<i>(Source: Nielson-Claritas, Inc.)</i>					
Households	28,690	200,753	2,225,745	344,093	117,490,413
Less than \$35,000	49.7%	28.7%	31.9%	30.7%	36.9%
Between \$35,000 and \$75,000	27.9%	31.8%	30.3%	34.2%	32.9%
Greater than \$75,000	22.3%	39.5%	37.9%	35.1%	30.2%

### **Educational Attainment Levels**

**2013 (Source: Nielson-Claritas, Inc.)**

No High School Diploma	9,519	40,930	475,004	77,571	30,445,631
High School Diploma Only	14,532	105,489	1,258,035	198,938	59,348,221
1 to 3 Years College	9,030	71,720	719,974	124,827	44,482,080
Associate Degree	2,542	25,095	256,086	44,831	15,835,627
Bachelors Degree	7,047	71,643	801,733	103,380	36,958,539
Graduate Degree	4,955	49,005	522,930	69,472	21,713,170
12 to 15 years of education	26,104	202,304	2,234,095	368,596	119,665,928
16 or more years of education	12,002	120,648	1,324,663	172,852	58,671,709

### **Percent Educational Attainment Levels**

**2013 (Source: Nielson-Claritas, Inc.)**

No High School Diploma	20.0%	11.2%	11.8%	12.5%	14.6%
High School Diploma Only	30.5%	29.0%	31.2%	32.1%	28.4%
1 to 3 Years College	19.0%	19.7%	17.8%	20.2%	21.3%
Associate Degree	5.3%	6.9%	6.3%	7.2%	7.6%
Bachelors Degree	14.8%	19.7%	19.9%	16.7%	17.7%
Graduate Degree	10.4%	13.5%	13.0%	11.2%	10.4%
12 to 15 years of education	54.8%	55.6%	55.4%	59.5%	57.3%
16 or more years of education	25.2%	33.2%	32.8%	27.9%	28.1%

## EXHIBIT 2: LABOR FORCE CHARACTERISTICS

Source: U.S. Bureau of Labor Statistics, Nielson-Claritas Inc.

	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Civilian Labor Force (Average Annual)</b>					
<i>(Source: U.S. Bureau of Labor Statistics)</i>					
2000	33,567	272,540	2,840,155	416,503	142,583
2012	31,437	275,794	3,007,051	444,042	154,975
February, 2014	31,156	275,518	2,979,314	439,488	155,046
% Change 2000 - 2012	-6.3%	1.2%	5.9%	6.6%	8.7%
<b>Employment (Average Annual)</b>					
<i>(Source: U.S. Bureau of Labor Statistics)</i>					
2000	32,096	263,830	2,731,354	402,777	136,891
2012	28,259	256,425	2,750,358	412,444	142,469
February, 2014	28,300	256,829	2,772,858	413,565	144,775
<b>Unemployment (Average Annual)</b>					
<i>(Source: U.S. Bureau of Labor Statistics)</i>					
2000	1,471	8,710	108,801	13,726	5,692
2012	3,178	19,369	256,693	31,598	12,506
February, 2014	2,676	16,689	206,456	25,923	10,271
<b>Unemployment Rate (Average Annual)</b>					
<i>(Source: U.S. Bureau of Labor Statistics)</i>					
2000	4.4%	3.2%	3.8%	3.3%	4.0%
2012	10.1%	7.0%	8.5%	7.1%	8.1%
February, 2014	8.6%	6.1%	6.9%	5.9%	6.6%
<b>Labor Participation (Source: Nielson-Claritas, Inc.)</b>					
Total (2013)	62.2%	67.2%	65.8%	64.1%	64.6%

## **EXHIBIT 3: EMPLOYMENT BY INDUSTRY SECTOR-RESIDENT BASED (2000-2013)**

Source: Nielson-Claritas, Inc.

Industry	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>2000 Census (Source: Nielson-Claritas, Inc.)</b>					
Total	30,331	249,314	2,645,508	376,808	129,711,275
Accommodation/Food Services	1,895	13,031	131,701	21,441	7,903,138
Administration/Support/Waste Management Services	1,630	8,555	91,516	12,489	4,393,871
Agriculture/Forestry/Fishing/Hunting/Mining	68	1,230	12,816	4,031	2,425,845
Arts/Entertainment/Recreation	677	5,049	39,714	7,554	2,306,228
Construction	1,280	15,116	149,737	27,863	8,800,915
Educational Services (Private and Public Sectors)	2,028	21,341	245,461	31,538	11,370,559
Finance/Insurance/Real Estate	4,535	36,003	239,860	43,800	8,934,300
Health Care/Social Assistance	4,377	27,829	346,146	41,518	14,470,928
Information	697	5,105	80,000	7,149	3,996,091
Manufacturing	2,916	32,853	322,215	49,715	18,284,765
Management of Companies/Enterprises	37	269	1,770	279	70,445
Other services (excl. Public Admin.)	1,484	10,458	121,316	15,752	6,320,248
Professional/Scientific/Technical Services	2,101	18,385	203,930	22,110	7,595,937
Public Administration (Excludes Education, Transp.)	1,949	9,717	123,530	19,606	6,211,640
Retail Trade	2,845	25,778	303,833	43,576	15,220,659
Transportation/Warehousing/Utilities (Private and Public Sectors)	1,156	11,958	133,519	18,000	6,739,490
Wholesale Trade	656	6,637	98,444	10,387	4,666,216

## **EXHIBIT 3: EMPLOYMENT BY INDUSTRY SECTOR-RESIDENT BASED (2000-2013)**

Source: Nielson-Claritas, Inc.

			Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
	Industry	Wilmington city, DE	New Castle County		
<b>2000 Percentages</b>					
	Total	100%	100%	100%	100%
	Accommodation/Food Services	6.2%	5.2%	5.0%	6.1%
	Administration/Support/Waste Management Services	5.4%	3.4%	3.5%	3.4%
	Agriculture/Forestry/Fishing/Hunting/Mining	0.2%	0.5%	0.5%	1.9%
	Arts/Entertainment/Recreation	2.2%	2.0%	1.5%	1.8%
	Construction	4.2%	6.1%	5.7%	6.8%
	Educational Services (Private and Public Sectors)	6.7%	8.6%	9.3%	8.8%
	Finance/Insurance/Real Estate	15.0%	14.4%	9.1%	6.9%
	Health Care/Social Assistance	14.4%	11.2%	13.1%	11.2%
	Information	2.3%	2.0%	3.0%	3.1%
	Manufacturing	9.6%	13.2%	12.2%	14.1%
	Management of Companies/Enterprises	0.1%	0.1%	0.1%	0.1%
	Other services (excl. Public Admin.)	4.9%	4.2%	4.6%	4.9%
	Professional/Scientific/Technical Services	6.9%	7.4%	7.7%	5.9%
	Public Administration (Excludes Education, Transp.)	6.4%	3.9%	4.7%	4.8%
	Retail Trade	9.4%	10.3%	11.5%	11.7%
	Transportation/Warehousing/Utilities (Private and Public Sectors)	3.8%	4.8%	5.0%	5.2%
	Wholesale Trade	2.2%	2.7%	3.7%	3.6%

## **EXHIBIT 3: EMPLOYMENT BY INDUSTRY SECTOR-RESIDENT BASED (2000-2013)**

Source: Nielson-Claritas, Inc.

Industry	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>2013 (Source: Nielson-Claritas, Inc.)</b>					
Total	31,114	274,273	2,914,036	439,566	148,565,698
Accommodation/Food Services	1,881	16,274	169,259	27,493	10,489,735
Administration/Support/Waste Management Services	2,053	10,923	117,542	16,653	6,148,107
Agriculture/Forestry/Fishing/Hunting/Mining	99	1,046	15,596	4,881	2,795,890
Arts/Entertainment/Recreation	608	6,124	56,881	10,925	3,137,503
Construction	1,220	15,805	158,768	30,818	9,686,139
Educational Services (Private and Public Sectors)	2,056	25,837	304,333	39,997	14,041,133
Finance/Insurance/Real Estate	4,195	38,282	247,743	47,853	10,020,660
Health Care/Social Assistance	5,326	40,325	458,416	63,422	19,961,987
Information	606	4,978	60,431	7,504	3,306,894
Manufacturing	2,039	25,308	281,577	39,802	15,636,012
Management of Companies/Enterprises	75	328	2,719	449	106,547
Other services (excl. Public Admin.)	1,687	10,771	130,991	18,587	7,361,578
Professional/Scientific/Technical Services	1,750	17,623	232,001	23,125	9,457,275
Public Administration (Excludes Education, Transp.)	2,157	12,686	132,594	25,240	7,484,776
Retail Trade	3,718	28,915	321,388	53,541	17,262,432
Transportation/Warehousing/Utilities (Private and Public Sectors)	1,233	12,738	140,259	19,957	7,397,673
Wholesale Trade	411	6,310	83,538	9,319	4,271,357



## **EXHIBIT 3: EMPLOYMENT BY INDUSTRY SECTOR-RESIDENT BASED (2000-2013)**

Source: Nielson-Claritas, Inc.

			Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
	Industry	Wilmington city, DE	New Castle County		
<b>2013 Percentages</b>					
	Total	100%	100%	100%	100%
	Accommodation/Food Services	6.0%	5.9%	5.8%	7.1%
	Administration/Support/Waste Management Services	6.6%	4.0%	4.0%	4.1%
	Agriculture/Forestry/Fishing/Hunting/Mining	0.3%	0.4%	0.5%	1.9%
	Arts/Entertainment/Recreation	2.0%	2.2%	2.0%	2.1%
	Construction	3.9%	5.8%	5.4%	6.5%
	Educational Services (Private and Public Sectors)	6.6%	9.4%	10.4%	9.5%
	Finance/Insurance/Real Estate	13.5%	14.0%	8.5%	6.7%
	Health Care/Social Assistance	17.1%	14.7%	15.7%	13.4%
	Information	1.9%	1.8%	2.1%	2.2%
	Manufacturing	6.6%	9.2%	9.7%	10.5%
	Management of Companies/Enterprises	0.2%	0.1%	0.1%	0.1%
	Other services (excl. Public Admin.)	5.4%	3.9%	4.5%	5.0%
	Professional/Scientific/Technical Services	5.6%	6.4%	8.0%	6.4%
	Public Administration (Excludes Education, Transp.)	6.9%	4.6%	4.6%	5.0%
	Retail Trade	11.9%	10.5%	11.0%	11.6%
	Transportation/Warehousing/Utilities (Private and Public Sectors)	4.0%	4.6%	4.8%	5.0%
	Wholesale Trade	1.3%	2.3%	2.9%	2.9%

### **EXHIBIT 3: EMPLOYMENT BY INDUSTRY SECTOR-RESIDENT BASED (2000-2013)**

Source: Nielson-Claritas, Inc.

Industry	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Net Change (2000-2013)</b>					
Total	783	24,959	268,528	62,758	18,854,423
Accommodation/Food Services	-14	3,243	37,558	6,052	2,586,597
Administration/Support/Waste Management Services	423	2,368	26,026	4,164	1,754,236
Agriculture/Forestry/Fishing/Hunting/Mining	31	-184	2,780	850	370,045
Arts/Entertainment/Recreation	-69	1,075	17,167	3,371	831,275
Construction	-60	689	9,031	2,955	885,224
Educational Services (Private and Public Sectors)	28	4,496	58,872	8,459	2,670,574
Finance/Insurance/Real Estate	-340	2,279	7,883	4,053	1,086,360
Health Care/Social Assistance	949	12,496	112,270	21,904	5,491,059
Information	-91	-127	-19,569	355	-689,197
Manufacturing	-877	-7,545	-40,638	-9,913	-2,648,753
Management of Companies/Enterprises	38	59	949	170	36,102
Other services (excl. Public Admin.)	203	313	9,675	2,835	1,041,330
Professional/Scientific/Technical Services	-351	-762	28,071	1,015	1,861,338
Public Administration (Excludes Education, Transp.)	208	2,969	9,064	5,634	1,273,136
Retail Trade	873	3,137	17,555	9,965	2,041,773
Transportation/Warehousing/Utilities (Private and Public Sectors)	77	780	6,740	1,957	658,183
Wholesale Trade	-245	-327	-14,906	-1,068	-394,859

### **EXHIBIT 3: EMPLOYMENT BY INDUSTRY SECTOR-RESIDENT BASED (2000-2013)**

Source: Nielson-Claritas, Inc.

Industry	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Percent Change (2000-2013)</b>					
Total	2.6%	10.0%	10.2%	16.7%	14.5%
Accommodation/Food Services	-0.7%	24.9%	28.5%	28.2%	32.7%
Administration/Support/Waste Management Services	26.0%	27.7%	28.4%	33.3%	39.9%
Agriculture/Forestry/Fishing/Hunting/Mining	45.6%	-15.0%	21.7%	21.1%	15.3%
Arts/Entertainment/Recreation	-10.2%	21.3%	43.2%	44.6%	36.0%
Construction	-4.7%	4.6%	6.0%	10.6%	10.1%
Educational Services (Private and Public Sectors)	1.4%	21.1%	24.0%	26.8%	23.5%
Finance/Insurance/Real Estate	-7.5%	6.3%	3.3%	9.3%	12.2%
Health Care/Social Assistance	21.7%	44.9%	32.4%	52.8%	37.9%
Information	-13.1%	-2.5%	-24.5%	5.0%	-17.2%
Manufacturing	-30.1%	-23.0%	-12.6%	-19.9%	-14.5%
Management of Companies/Enterprises	102.7%	21.9%	53.6%	60.9%	51.2%
Other services (excl. Public Admin.)	13.7%	3.0%	8.0%	18.0%	16.5%
Professional/Scientific/Technical Services	-16.7%	-4.1%	13.8%	4.6%	24.5%
Public Administration (Excludes Education, Transp.)	10.7%	30.6%	7.3%	28.7%	20.5%
Retail Trade	30.7%	12.2%	5.8%	22.9%	13.4%
Transportation/Warehousing/Utilities (Private and Public Sectors)	6.7%	6.5%	5.0%	10.9%	9.8%
Wholesale Trade	-37.3%	-4.9%	-15.1%	-10.3%	-8.5%

## **EXHIBIT 4: EMPLOYMENT BY MAJOR NAICS CODES-ESTABLISHMENT BASED (2012)**

Source: QCEW Bureau of Labor Statistics, and Delaware Dept. of Labor

NAICS		Wilmington New Castle		Delaware	U.S.
		City *	County		
----	Total	52,093	266,766	405,672	131,696,378
11----	Forestry, fishing, hunting, and agriculture support	N/D	N/D	1,402	1,189,986
21----	Mining	N/D	N/D	2	798,132
22----	Utilities	N/D	1,447	2,015	N/D
23----	Construction	1,259	12,340	18,537	5,586,553
31----	Manufacturing	785	11,780	25,744	11,904,945
42----	Wholesale trade	431	8,349	12,484	5,656,717
44----	Retail trade	1,981	29,619	50,681	14,864,946
48----	Transportation & warehousing (private sector)	791	5,786	9,217	4,158,046
51----	Information	389	4,341	5,451	2,677,224
52----	Finance & insurance	10,686	32,896	37,154	5,563,653
53----	Real estate & rental & leasing	679	3,302	5,422	1,943,297
54----	Professional, scientific & technical services	7,322	22,799	27,223	7,897,429
55----	Management of companies & enterprises	1,819	6,978	7,532	2,003,075
56----	Admin, support, waste mgt, remediation services	4,470	15,824	21,805	7,987,134
61----	Educational services (private sector)	773	3,899	4,586	2,608,143
62----	Health care and social assistance	7,534	40,032	59,024	16,796,873
71----	Arts, entertainment & recreation	466	4,654	8,492	1,975,855
72----	Accommodation & food services	2,524	20,296	35,113	11,763,460
81----	Other services (except public administration)	1,558	8,788	13,471	4,548,785
92----	Government (Includes education, transportation)	8,626	33,425	60,317	21,050,509

\* Source: Delaware Department of Labor

N/D: Data not disclosed by BLS for reasons of confidentiality

**EXHIBIT 4: EMPLOYMENT BY MAJOR NAICS CODES-ESTABLISHMENT BASED (2012)**

*Source: QCEW Bureau of Labor Statistics, and Delaware Dept. of Labor*

## **EXHIBIT 4: EMPLOYMENT BY MAJOR NAICS CODES-ESTABLISHMENT BASED (2012)**

Source: QCEW Bureau of Labor Statistics, and Delaware Dept. of Labor

NAICS		Wilmington New Castle		Delaware	U.S.
		City *	County		
----	Total	100%	100%	100%	100%
11----	Forestry, fishing, hunting, and agriculture support	-	-	0.3%	0.9%
21----	Mining	-	-	0.0%	0.6%
22----	Utilities	-	0.5%	0.5%	-
23----	Construction	2.4%	4.6%	4.6%	4.2%
31----	Manufacturing	1.5%	4.4%	6.3%	9.0%
42----	Wholesale trade	0.8%	3.1%	3.1%	4.3%
44----	Retail trade	3.8%	11.1%	12.5%	11.3%
48----	Transportation & warehousing (private sector)	1.5%	2.2%	2.3%	3.2%
51----	Information	0.7%	1.6%	1.3%	2.0%
52----	Finance & insurance	20.5%	12.3%	9.2%	4.2%
53----	Real estate & rental & leasing	1.3%	1.2%	1.3%	1.5%
54----	Professional, scientific & technical services	14.0%	8.5%	6.7%	6.0%
55----	Management of companies & enterprises	3.5%	2.6%	1.9%	1.5%
56----	Admin, support, waste mgt, remediation services	8.6%	5.9%	5.4%	6.1%
61----	Educational services (private sector)	1.5%	1.5%	1.1%	2.0%
62----	Health care and social assistance	14.5%	15.0%	14.5%	12.8%
71----	Arts, entertainment & recreation	0.9%	1.7%	2.1%	1.5%
72----	Accommodation & food services	4.9%	7.6%	8.7%	8.9%
81----	Other services (except public administration)	3.0%	3.3%	3.3%	3.5%
92----	Government (Includes education, transportation)	16.6%	12.5%	14.9%	16.0%

\* Source: Delaware Department of Labor

**EXHIBIT 4: EMPLOYMENT BY MAJOR NAICS CODES-ESTABLISHMENT BASED (2012)**

*Source: QCEW Bureau of Labor Statistics, and Delaware Dept. of Labor*

## **EXHIBIT 5: EMPLOYMENT OF RESIDENTS BY OCCUPATION CATEGORY (2000)**

Source: U.S. Census Bureau

	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Actual Employment</b>					
Total	-	249,308	-	376,799	129,712,881
Architect/Engineer	N/R	5,518	N/R	7,214	2,659,298
Arts/Entertainment/Sports	562	4,140	50,584	5,461	2,483,906
Building Grounds Maintenance	1,612	6,723	74,597	11,328	4,254,049
Business/Financial Operations	N/R	14,624	N/R	18,823	5,559,774
Community/Social Services	775	4,274	46,150	6,727	1,953,153
Computer/Mathematical	560	8,337	80,728	9,629	3,167,994
Construction/Extraction	N/R	12,028	N/R	21,624	7,149,269
Education/Training/Library	1,379	13,964	155,588	20,771	7,336,846
Farm/Fish/Forestry	29	659	6,308	1,924	951,700
Food Preparation/Serving	1,907	11,472	116,806	18,600	6,251,185
Health Practitioner/Technician	981	12,104	147,200	17,754	5,979,533
Healthcare Support	902	3,637	53,193	6,176	2,592,740
Maintenance and Repair	683	8,278	91,800	14,337	5,106,502
Legal	696	3,264	39,205	4,044	1,412,561
Life/Physical/Social Science	493	6,104	38,480	6,949	1,203,366
Management, Except Farmer	2,672	25,052	249,812	35,480	11,887,314
Office/Administration Support	5,688	46,370	465,077	64,292	20,027,302
Production	1,738	13,888	162,221	24,844	11,007,960
Protective Services	N/R	4,884	N/R	8,011	2,549,906
Sales/Related	2,575	24,525	297,529	39,752	14,591,201
Personal Care/Services	1,129	6,710	65,507	10,796	3,628,040
Transportation/Moving	1,928	12,753	141,535	22,263	7,959,282

N/R: Data not reported



## **EXHIBIT 5: EMPLOYMENT OF RESIDENTS BY OCCUPATION CATEGORY (2000)**

Source: U.S. Census Bureau

	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Actual Employment</b>					
Total	-	100%	-	100%	100%
Architect/Engineer	-	2%	-	2%	2%
Arts/Entertainment/Sports	-	2%	-	1%	2%
Building Grounds Maintenance	-	3%	-	3%	3%
Business/Financial Operations	-	6%	-	5%	4%
Community/Social Services	-	2%	-	2%	2%
Computer/Mathematical	-	3%	-	3%	2%
Construction/Extraction	-	5%	-	6%	6%
Education/Training/Library	-	6%	-	6%	6%
Farm/Fish/Forestry	-	0%	-	1%	1%
Food Preparation/Serving	-	5%	-	5%	5%
Health Practitioner/Technician	-	5%	-	5%	5%
Healthcare Support	-	1%	-	2%	2%
Maintenance and Repair	-	3%	-	4%	4%
Legal	-	1%	-	1%	1%
Life/Physical/Social Science	-	2%	-	2%	1%
Management, Except Farmer	-	10%	-	9%	9%
Office/Administration Support	-	19%	-	17%	15%
Production	-	6%	-	7%	8%
Protective Services	-	2%	-	2%	2%
Sales/Related	-	10%	-	11%	11%
Personal Care/Services	-	3%	-	3%	3%
Transportation/Moving	-	5%	-	6%	6%

## **EXHIBIT 6: EMPLOYMENT OF RESIDENTS BY OCCUPATION CATEGORY (2013)**

Source: Nielson-Claritas, Inc.

	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA- NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Actual Employment</b>					
Total	31,114	274,273	2,914,036	439,566	148,565,698
Architecture/Engineering	3,037	4,707	300,175	6,608	2,726,960
Arts/Design/Entert/Sports/Media	1,688	3,488	165,216	5,140	2,780,432
Building/Grounds Cleaning/Maint	595	8,928	86,943	16,527	5,922,363
Business and Financial Operations	300	17,458	50,001	23,382	6,933,326
Community/Social Services	373	5,634	37,489	8,336	2,477,755
Computer and Mathematical	944	9,160	58,976	10,801	3,658,188
Construction/Extraction	1,063	12,277	49,135	23,099	7,824,629
Education/Training/Library	1,712	18,608	198,780	28,605	9,094,900
Farming/Fishing/Forestry	370	653	52,646	1,721	1,097,597
Food Preparation/Serving Related	1,541	14,567	196,322	24,883	8,354,110
Healthcare Practitioner/Technician	876	15,723	70,370	24,684	8,048,757
Healthcare Support	1,095	5,772	70,142	9,658	3,650,402
Installation/Maintenance/Repair	1,785	8,570	147,961	15,907	4,926,012
Legal	1,753	5,482	95,962	6,456	1,732,975
Life/Physical/Social Science	1,407	5,325	94,044	6,689	1,282,204
Management incl Farmers/Farm Mgrs	3,105	28,926	316,420	44,417	14,378,676
Office/Administrative Support	4,511	41,546	430,191	64,263	20,739,850
Personal Care/Service	102	11,159	8,244	20,737	8,884,956
Production	1,055	6,702	118,584	11,040	3,317,474
Protective Service	568	27,387	82,801	46,741	16,509,374
Sales/Related	1,108	8,543	130,057	15,144	5,241,495
Transportation/Material Moving	2,126	13,658	153,577	24,728	8,983,263

## **EXHIBIT 6: EMPLOYMENT OF RESIDENTS BY OCCUPATION CATEGORY (2013)**

Source: Nielson-Claritas, Inc.

	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA- NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Percentage of Labor Force</b>					
Architecture/Engineering	9.8%	1.7%	10.3%	1.5%	1.8%
Arts/Design/Entert/Sports/Media	5.4%	1.3%	5.7%	1.2%	1.9%
Building/Grounds Cleaning/Maint	1.9%	3.3%	3.0%	3.8%	4.0%
Business and Financial Operations	1.0%	6.4%	1.7%	5.3%	4.7%
Community/Social Services	1.2%	2.1%	1.3%	1.9%	1.7%
Computer and Mathematical	3.0%	3.3%	2.0%	2.5%	2.5%
Construction/Extraction	3.4%	4.5%	1.7%	5.3%	5.3%
Education/Training/Library	5.5%	6.8%	6.8%	6.5%	6.1%
Farming/Fishing/Forestry	1.2%	0.2%	1.8%	0.4%	0.7%
Food Preparation/Serving Related	5.0%	5.3%	6.7%	5.7%	5.6%
Healthcare Practitioner/Technician	2.8%	5.7%	2.4%	5.6%	5.4%
Healthcare Support	3.5%	2.1%	2.4%	2.2%	2.5%
Installation/Maintenance/Repair	5.7%	3.1%	5.1%	3.6%	3.3%
Legal	5.6%	2.0%	3.3%	1.5%	1.2%
Life/Physical/Social Science	4.5%	1.9%	3.2%	1.5%	0.9%
Management incl Farmers/Farm Mgrs	10.0%	10.5%	10.9%	10.1%	9.7%
Office/Administrative Support	14.5%	15.1%	14.8%	14.6%	14.0%
Personal Care/Service	0.3%	4.1%	0.3%	4.7%	6.0%
Production	3.4%	2.4%	4.1%	2.5%	2.2%
Protective Service	1.8%	10.0%	2.8%	10.6%	11.1%
Sales/Related	3.6%	3.1%	4.5%	3.4%	3.5%
Transportation/Material Moving	6.8%	5.0%	5.3%	5.6%	6.0%

## EXHIBIT 7: AVERAGE EARNINGS BY MAJOR NAICS CODES (2012)

Sources: Quarterly Census of Employment Wages Program, Bureau of Labor Statistics and Delaware Dept. of Labor

NAICS		New Castle Co, DE	Delaware	U.S.
-----	Total	\$58,757	\$51,728	\$49,289
11----	Forestry, fishing, hunting, and agriculture support	N/D	\$33,196	\$28,619
21----	Mining	N/D	\$66,062	\$52,298
22----	Utilities	\$97,399	\$95,701	N/D
23----	Construction	\$55,060	\$51,031	\$52,298
31----	Manufacturing	\$76,135	\$57,191	\$60,496
42----	Wholesale trade	\$91,126	\$81,326	\$68,226
44----	Retail trade	\$26,960	\$26,157	\$27,731
48----	Transportation & warehousing	\$46,167	\$42,569	\$46,612
51----	Information	\$60,262	\$59,230	\$81,955
52----	Finance & insurance	\$89,279	\$86,525	\$91,218
53----	Real estate & rental & leasing	\$47,341	\$42,021	\$48,308
54----	Professional, scientific & technical services	\$104,326	\$97,589	\$83,368
55----	Management of companies & enterprises	\$130,942	\$129,265	\$108,201
56----	Admin, support, waste mgt, remediation services	\$34,812	\$33,655	\$34,855
61----	Educational services	\$44,125	\$42,438	\$44,509
62----	Health care and social assistance	\$52,808	\$49,911	\$45,406
71----	Arts, entertainment & recreation	\$28,676	\$27,478	\$33,745
72----	Accommodation & food services	\$17,169	\$16,788	\$17,946
81----	Other services (except public administration)	\$28,327	\$27,331	\$29,916
	Government	\$57,757	\$51,728	\$49,757

N/D: Data not disclosed by BLS for reasons of confidentiality

## **EXHIBIT 8: MEDIAN ANNUAL EARNINGS BY SELECTED BENCHMARK OCCUPATION CATEGORY**

Source: *Salary.com*

<b>Occupation Description</b>	<b>Wilmington, DE</b>
Accounting Clerk	\$37,999
Administrative Assistant	\$38,750
Assembler	\$33,535
CAD Drafter	\$60,061
Civil Engineer	\$78,694
Computer Programmer	\$72,046
Customer Service Representative	\$39,453
Electronics Technician	\$51,448
Engineering Technician	\$53,672
Lab Technologist	\$43,033
Machinist - Journey	\$47,544
Maintenance Specialist	\$42,244
Nurse, Licensed Practical	\$43,340
Nursing, Certified Assistant	\$29,971
PC Support Specialist	\$55,024
Secretary, Executive	\$60,018
Systems Analyst	\$73,949

## **EXHIBIT 9: POST SECONDARY INSTITUTIONS: NEW CASTLE COUNTY**

Source: U.S. Department of Education, National Center for Education Statistics (IPEDS)

<b>Less-than-Four-Year Institutions</b>	<b>Location</b>	<b>Total Fall Enrollment (2013)</b>	<b>Total Graduates (2011-2012)</b>
Delaware College of Art and Design	Wilmington	211	78
Delaware Technical and Community College	Newark	7,216	638

<b>More-than-Four-Year Institutions</b>	<b>Location</b>	<b>Total Fall Enrollment (2013)</b>	<b>Total Graduates (2011-2012)</b>
Goldey-Beacom College	Wilmington	1,352	361
University of Delaware	Newark	21,856	4,885
Widener University (Delaware Law School)	Wilmington	1,048	290
Wilmington University	New Castle	12,581	3,008

Both Delaware State University and Drexel University have recently opened satellite campuses on Market Street, Wilmington. Springfield College also launched a center for human services near downtown.

**EXHIBIT 10: AREA SCHOOLS - DEGREES AND CERTIFICATES CONFERRED IN 2011-2012**

Source: U.S. Department of Education

Institution Name	Description	Less than 1	1-2 Year	Associate's	Bachelor's	Master's	Doctorate	Grand Total
		Yr Certificate						
<b>Delaware Technical Community College-Stanton/Wilmington</b>		<b>53</b>	<b>19</b>	<b>566</b>				<b>638</b>
	Biological and Biomedical Sciences			7				7
	Business, Management, Marketing, and Related Support Services			92				92
	Computer and Information Sciences and Support Services			10				10
	Education			41				41
	Engineering			4				4
	Engineering Technologies and Engineering-related Fields		1	40				41
	English Language and Literature/Letters	40						40
	Foreign Languages, Literatures, and Linguistics	1						1
	Health Professions and Related Programs		14	230				244
	Homeland Security, Law Enforcement, Firefighting, and Related Protective Service	1		62				63
	Mathematics and Statistics			4				4
	Mechanic and Repair Technologies/Technicians			17				17
	Parks, Recreation, Leisure and Fitness Studies			12				12
	Personal and Culinary Services	4	3	11				18
	Precision Production	3						3
	Public Administration and Social Service Professions	1		26				27
	Science Technologies/Technicians	3	1	10				14
<b>University of Delaware</b>				<b>303</b>	<b>3,535</b>	<b>785</b>	<b>262</b>	<b>4,885</b>
	Agriculture, Agriculture Operations and Related Sciences			1	73	13	5	92
	Architecture and Related Services				5			5
	Area, Ethnic, Cultural, Gender, and Group Studies				37	7		44
	Biological and Biomedical Sciences				186	43	21	250
	Business, Management, Marketing, and Related Support Services				636	214		850
	Communication, Journalism, and Related Programs				155	9		164
	Computer and Information Sciences and Support Services				35	23	10	68
	Education			13	304	111	27	455
	Engineering				297	62	59	418
	Engineering Technologies and Engineering-related Fields				17			17
	English Language and Literature/Letters				132	11	5	148
	Family and Consumer Sciences/Human Sciences				86	9	3	98
	Foreign Languages, Literatures, and Linguistics				69	23	1	93
	Health Professions and Related Programs				308	31	34	373
	History				76	12	9	97
	Legal Professions and Studies				2	12	4	18
	Liberal Arts and Sciences, General Studies and Humanities			289	7	4		300
	Mathematics and Statistics				23	27	4	54
	Multi/Interdisciplinary Studies				29	4	13	46
	Natural Resources and Conservation				56	6		62
	Parks, Recreation, Leisure and Fitness Studies				217	15		232
	Philosophy and Religious Studies				6			6
	Physical Sciences				57	31	32	120
	Psychology				145	14	8	167
	Public Administration and Social Service Professions				83	25		108

**EXHIBIT 10: AREA SCHOOLS - DEGREES AND CERTIFICATES CONFERRED IN 2011-2012**

Source: U.S. Department of Education

Institution Name	Description	Less than 1					Grand Total		
		Yr Certificate	1-2 Year Certificate	Associate's Degree	Bachelor's Degree	Master's Degree			
Wilmington University	Social Sciences				423	48	23	494	
	Transportation and Materials Moving				1			1	
	Visual and Performing Arts				70	31	4	105	
					<b>57</b>	<b>1,420</b>	<b>1,498</b>	<b>33</b>	<b>3,008</b>
	Business, Management, Marketing, and Related Support Services				469	473	7	949	
	Communication, Journalism, and Related Programs				4			4	
	Communications Technologies/Technicians and Support Services				22			22	
	Computer and Information Sciences and Support Services			8	79	15		102	
	Education				110	679	26	815	
	Health Professions and Related Programs				193	155		348	
	Homeland Security, Law Enforcement, Firefighting, and Related Protective Service				118	79		197	
	Legal Professions and Studies				9			9	
	Liberal Arts and Sciences, General Studies and Humanities			49	122			171	
	Military Technologies and Applied Sciences					2		2	
	Multi/Interdisciplinary Studies				180			180	
	Parks, Recreation, Leisure and Fitness Studies				13			13	
	Psychology				89	27		116	
	Public Administration and Social Service Professions					66		66	
	Social Sciences					2		2	
	Transportation and Materials Moving				9			9	
Visual and Performing Arts				3			3		
<b>Grand Total</b>		<b>53</b>	<b>19</b>	<b>926</b>	<b>4,955</b>	<b>2,283</b>	<b>295</b>	<b>8,531</b>	



## **EXHIBIT 11: AIR TRAVEL INFORMATION**

Source: [www.flywilmilg.com](http://www.flywilmilg.com).

### **Wilmington/Philadelphia Regional Airport**

#### **Non Stop Flight Service**

##### **To/From**

Atlanta, GA  
Denver, CO  
Detroit, MI  
Fort Meyers, FL  
Orlando, FL  
Tampa, FL  
Chicago, IL Midway  
Denver, CO

### **Philadelphia International Airport**

A major International Hub with direct service to multiple US and foreign cities.

## **EXHIBIT 12: HIGHWAY TRAVEL INFORMATION**

Source: Google Maps

<b>Destination City</b>	<b>Highway Miles*</b>	<b>Driving Time</b>
Philadelphia, PA	32	37 minutes
Baltimore, MD	69	1 hour 14 minutes
Allentown, PA	79	1 hours 36 miles
Washington, DC	108	1 hour 57 minutes
New York, NY	126	2 hours 5 minutes
Norfolk, VA	245	4 hours 21 minutes
Pittsburgh, PA	298	4 hours 47 minutes
Boston, MA	339	5 hours 2 minutes
Columbus, OH	466	7 hours 20 minutes
Louisville, KY	680	10 hours 3 minutes
Chicago, IL	752	11 hours 34 minutes
Atlanta, GA	769	11 hours 26 minutes
Dallas, TX	1,436	20 hours 56 minutes

\*From Wilmington

## EXHIBIT 13: QUALITY OF LIFE MEASURES

	Wilmington city, DE	New Castle County	Philadelphia- Camden- Wilmington, PA- NJ-DE-MD Metropolitan Statistical Area	Delaware	U.S.
<b>Commuting (2013)</b>					
<i>(Source: Nielson-Claritas, Inc.)</i>					
% of Workforce With Under 15-minute commute or work at home	35.2%	27.6%	25.5%	29.4%	31.3%
% of Workforce with 15 to 29-minute commute	45.3%	42.9%	32.7%	40.7%	34.9%
% of Workforce with 30 to 59-minute commute	14.3%	22.7%	32.0%	23.0%	26.2%
% of Workforce with 60-minute or more commute	5.2%	6.8%	9.8%	6.9%	7.6%

### Housing

*(Source: Nielson-Claritas, Inc.)*

Median Home Value 2013	\$169,733	\$238,914	\$227,631	\$225,027	\$171,345
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### Crime (2012)

*(Source: FBI Crime Statistics, New Castle County estimated by WDG using Census and FBI data)*

Property Crimes per 100,000 People	5,304.6	1,154.8	N/A	3,340.9	2,859.2
Violent Crimes per 100,000 People	1,703.5	197.1	N/A	547.4	386.9

N/A: Data not available

## **EXHIBIT 14: CURRENT STATE OF DELAWARE WORKERS' COMPENSATION AND LABOR LEGISLATION**

Source: WDG Database

### **Unemployment Insurance**

Unemployment insurance rate (2013) (avg. existing employers)	0.3% - 8.2%
Unemployment insurance rate (for new employers)	5.4%
Unemployment insurance taxable base (2013)	\$10,500
Unemployment insurance maximum weekly benefit amount	\$330

### **Workers' Compensation**

Waiting period (days)	3
Automatic cost of living increase for total disability?	No
Employee allowed to choose any physician?	Yes
Mental stress generally allowed as a compensable injury as a result of cumulative trauma?	Yes
Carpal tunnel generally allowed as a compensable injury as a result of cumulative trauma?	Yes
Back generally allowed as a compensable injury as a result of cumulative trauma?	Yes
Neck generally allowed as a compensable injury as a result of cumulative trauma?	Yes
Cardiovascular generally allowed as a compensable injury as a result of cumulative trauma?	No
Second medical opinion allowed from physician chosen by employee, but paid for by employer.	No
Coverage for Permanent Partial	Yes

## **EXHIBIT 14: CURRENT STATE OF DELAWARE WORKERS' COMPENSATION AND LABOR LEGISLATION**

Source: WDG Database

### **Labor Legislation**

Employment at will?	Yes
If yes, significant restrictions (from employers standpoint)	No
Restrictions on employee drug testing	No
Telephone monitoring restrictions for regulation of productivity (or customer service)	Yes; Two-Party Consent
Plant Closing Law stricter than Federal?	No
ADA legislation stricter than Federal?	No
Ban on hiring replacement workers during a strike?	No
Striking workers entitled to unemployment insurance?	No
Relatively difficult for an employer to contest and win a workers' comp. claim?	No
Relatively difficult for an employer to contest and win an unemployment ins. claim?	No
Right to Work law in effect?	No
EEO hiring standards more restrictive than Federal?	No
Sexual harassment laws more restrictive than Federal?	No
Mandated parental leave legislation more generous than Federal?	No

## **EXHIBIT 15: STATE OF DELAWARE TAX POLICIES**

Source: WDG Database

### **Subject To Property Tax**

Production Machinery & Equipment	No
Non-Production Machinery & Equipment	No
Pollution Control Equipment	No
Computer Hardware	No
Computer Software, Customized	No
Computer Software, Standard	No
Telecommunications Equipment	No
Office FF&E	No
Office Supplies	No
Inventory: Raw Materials	No
Inventory: Work in Progress	No
Inventory: Finished Goods	No
Freeport Exemption--Type	N/A
Direct Mail Lists	No

### **Intangible Property Tax**

Yes or No	No
Capital Stock	-
Accounts Receivable	-
Other	-

### **Sales/Use Tax**

Maximum State Rate	None
Maximum Local Add-on	None

## **EXHIBIT 15: STATE OF DELAWARE TAX POLICIES**

Source: WDG Database

### **Subject To Sales/Use Tax**

Production Machinery & Equip.	No
Non-Prod Machinery & Equip.	No
Pollution Control Equip.	No
Office FF&E	No
Telecommunications Equipment	No
Computer Hardware	No
Computer Software - Customized	No
Computer Software - Standard	No
Raw Materials	No
Office Supplies	No
Electric Power	No
Natural Gas	No
Water	No
Sewer	No
Hazardous Waste Disposal	No
Non-Hazardous Waste Disposal	No
Telephone - Local	No
Telephone - Intra-State	No
Telephone - Inter-State	No
Telephone - 1-800 - Intra-State	No
Telephone - 1-800 - Inter-State	No
Telephone - WATS- Intra-State	No
Telephone - WATS- Inter-State	No
Direct Mail Lists	No
Professional Services	No
Building construction materials, Office	No
Building construction materials, Industrial	No

## **EXHIBIT 15: STATE OF DELAWARE TAX POLICIES**

Source: WDG Database

### **State Taxation Of The Internet**

Access to Internet	No
Sales of goods over Internet	No
Downloaded information/software	No
Canned software	No
Custom software	No

### **Corporate Income Tax (2013)**

Maximum State Tax Rate	8.7%
Taxable Base	Net income
Waters-Edge or Unitary	Neither
Federal Taxes Deduction	No
States With No Local Add-on	None

### **Franchise Tax**

Existing Policy	Yes
Tax Rate	\$25 annual filing fee plus a minimum of \$75 to a maximum of \$180,000
Basis	Number of shares or no-par capital



## **EXHIBIT 15: STATE OF DELAWARE TAX POLICIES**

Source: WDG Database

### **Other Corporate Taxes**

Stamp Documentation	No
State Rate	-
Maximum Local Rate	-
Mortgage Recording	No
State Rate	-
Maximum Local Rate	-
Realty Transfer	Yes
State Rate	3% of the sale price. The buyer and the seller pay 1.5% each. Depending on the location of property, the Realty Transfer Tax is split between the state and the municipality, or the state and the county.
Maximum Local Rate	1.50%

### **Gross Receipts Tax**

Delaware does not impose a state or local sales tax, but does impose a gross receipts tax on the seller of goods (tangible or otherwise) or provider of services in the state. "Gross receipts" comprises the total receipts of a business received from

Business and occupational gross receipts tax rates range from 0.1037% to 2.0736%, depending on the business activity.

### **Personal Income Tax**

No tax on the first \$2,000.
2.2 percent on taxable income between \$2,001 and \$5,000.
3.9 percent on taxable income between \$5,001 and \$10,000.
4.8 percent on taxable income between \$10,001 and \$20,000.
5.2 percent on taxable income between \$20,001 and \$25,000.
5.55 percent on taxable income between \$25,001 and \$60,000.
6.75 percent on taxable income over \$60,000.

## **EXHIBIT 16: WILMINGTON REAL ESTATE TAXES (\$/\$100 ASSESSMENT) 2013-2014**

*Source: City of Wilmington*

City tax rates are determined by the school district in which any particular property is located.

<b>School District</b>	<b>Rate</b>	<b>City Rate</b>	<b>County Rate</b>	<b>Vo Tech</b>	<b>Total</b>
Brandywine	\$2.1785	\$1.7670	\$0.2436	\$0.1500	\$4.3391
Red Clay	\$2.1785	\$1.7670	\$0.2436	\$0.1500	\$4.3391
Christina	\$2.1785	\$1.7670	\$0.2436	\$0.1500	\$4.3391
Colonial	\$2.1785	\$1.7670	\$0.2436	\$0.1500	\$4.3391

All rates are effective rates, based upon 100% of assessed value. Last assessment made was in 1983. Major redevelopment projects have been subject to more recent reassessments.

# **EXHIBIT 17: STATE OF DELAWARE BUSINESS INCENTIVE POLICIES**

*Source: Delaware Economic Development Office*

## **New Economy Jobs Program**

The New Economy Jobs program allows employers to obtain up to a 65% rebate on the withholding taxes for their new Delaware taxpayers. To qualify, an employer must add at least 50 net new jobs with each having a minimum annual salary of \$100,000

## **Blue Collar Job Act**

The Blue Collar Job Act provides eligible businesses that (1) are engage in a qualified activity (listed to the right); (2) hire five or more qualified employees; and (3) make an investment of at least \$200,000 (\$40,000 per qualified employee) in a qualified facility, tax credits against corporate or personal income taxes, gross receipts tax, and public utility tax.

Manufacturing; Wholesaling; Scientific, agricultural or industrial research, development or testing; Computer processing or data preparation or processing services; Engineering services; Consumer credit reporting services, including adjustment and collection services and credit reporting services; Aviation services; Non-custom computer software; Telecommunications services; Any combination of the activities described above; or, The administration, management or support operations (including marketing) of any activity described above

These credits may be taken during the tax year in which the qualified facility is placed in service and for any of the nine following years. In addition to credits offered under the Targeted Industry Tax Incentives, qualifying firms receive \$400 corporate income tax credit per employee and per \$100,000 investment. The aggregate amount of credits claimed in any given year may not exceed 50% of the firm's tax liability. Businesses that are not subject to the corporate income tax (e.g., pass through entities such as S-Corporations) are entitled to use the credits against personal income tax by attaching Form 700, Business Tax Credits to their Delaware Resident or Part-Year/Non-Resident Personal Income Tax return of shareholders/partners/sole proprietors.

## **EXHIBIT 17: STATE OF DELAWARE BUSINESS INCENTIVE POLICIES**

*Source: Delaware Economic Development Office*

### **Research & Development Tax Credit**

Qualified businesses that incur research and development expenses (as defined in Section 41(c) of the Internal Revenue Code) may elect Delaware research and development credits for the taxable year equal to: (1) 10% of the excess of the taxpayer's total Delaware qualified research and development expenses for the taxable year over the taxpayer's Delaware base amount, or (2) 50% of Delaware's apportioned share of taxpayer's federal research and development tax credit using the alternative incremental credit method (under Section 41(c)4 of the Internal Revenue Code). Credit is limited to 50% of the Delaware income tax liability. Any unused credit may be carried forward and applied to no more than 15 succeeding taxable years following the first taxable year for which the taxpayer was entitled to claim the credit. The total amount of credits approved with respect to all applicants cannot exceed \$5 million in any fiscal year. If applications exceed \$5 million, each qualified applicant will receive a credit equal to  $(\$5 \text{ million} \times \text{eligible credit for approved applicant} / \text{eligible credit for all approved applicants})$ .

### **Green Industries Tax Credits:**

#### **Waste Reductions**

Manufacturers that reduce their chemical waste, as reported under the Toxics Release Inventory, by 20% or their other wastes by 50% are granted a \$650 corporate income tax credit for each 10% reduction. Credits will be provided over a five-year period.

#### **Industry Credits**

Eligible firms include: (a) manufacturers whose production inputs are comprised of at least 25% recycled materials; (b) firms that engage in the processing of materials removed from Delaware's solid waste stream for resale as input to manufacturers; and (c) firms that collect and distribute recycled materials, and/or materials removed from Delaware's solid waste stream for the purpose of recycling. In addition, eligible firms must meet the investment and employment criteria listed under Targeted Industry Tax Incentives.

In addition to credits offered under the Target Industry Tax Incentives, qualifying firms receive a \$650 corporate tax credit per employee and per \$100,000 investment. Unused credits may be carried forward for a period of ten years. These firms also qualify for the ten-year gross receipts tax reductions

## **EXHIBIT 17: STATE OF DELAWARE BUSINESS INCENTIVE POLICIES**

*Source: Delaware Economic Development Office*

### **Public Utility Tax Rebates for Industrial Users**

Industrial firms meeting the criteria for targeted industries tax credits are eligible for a rebate of 50% of the Public Utilities Tax imposed on new or increased consumption of gas and electricity for five years.

### **Other Tax Credits:**

#### **Travelink**

Allows for an employer to obtain credits against taxable income for establishing a commuter reduction program approved by the Department of Transportation. Aimed at reducing traffic congestion on certain commuter routes during peak hours, Travelink offers up to a \$100,000 tax credit for qualified employers.

#### **Historic Preservation**

Provides up to a 100% tax credit rebate of qualified expenditures made in the rehabilitation of any certified historic property. Tax credits may be used against personal income or bank franchise tax burdens, with credits ranging from \$5,000 to \$20,000, not to exceed the state's yearly fiscal limit of \$5,000,000.

## **EXHIBIT 18: WILMINGTON CITY INCENTIVE POLICIES**

Source: *City of Wilmington Mayor's Office of Economic Development*

Incentive	Intent	Details
Strategic Fund (multi-year discretionary)	Job creation incentive grants to companies based on wage tax, advanced under a loan to grant structure with claw back	<ul style="list-style-type: none"> <li>• Strategic Fund – modeled after Delaware's</li> <li>• Year over year, discretionary by staff after Council</li> <li>• Have had 5 infusions over 13 years</li> <li>• Sits in City capital program</li> <li>• Used for grants for job producing projects – recruit or retain (job creation or keep company at end of lease term)</li> <li>• Structure as loan converted to grant based on performance</li> <li>• Clawback provisions</li> <li>• Based on payroll</li> <li>• Do discounted cash flow based on wage taxes, wage taxes go into general fund</li> <li>• Generates about 4 to 1 return. Works better with larger size business</li> </ul>
Strategic Fund (multi-year discretionary)	Small business loans with partial principle forgiveness	Forgive part of principle every year after 5 years operation
Statutory Head Tax abatement	100% for 5 years – was rolling, but may be changed to fixed date	\$15/month on more than 5 employees (first 5 exempt)
Statutory Property tax abatement on improved value	Encourage capital investment in improvements – when CO is approved – must be above threshold 10 years, 5 @ 100%, then step-down 20% per year	1/3 of city revenue from property taxes  Can abate improved value without eroding base; statutorily available city-wide but different zones. Must apply for it. Only applies to City taxes – not county or school
Payment in lieu of Property Tax abatement (discretionary)	Same as previous	Can do up-front cash payment based on discounted cash flow analysis if waive abatement - only works for bigger deals
Site Acquisition and Improvement fund– Infrastructure Contribution Agreements	Support private investment by putting in necessary infrastructure Functions as gap financing – no minimum threshold	Capital/presently unfunded  Encouraging city to not legislate this too much Project needs to quantify/justify the gap Can use for land purchase with Council approval
Upstairs Fund	One-off program to encourage redevelopment of upper floors on Market Street between 2 <sup>nd</sup> and 9 <sup>th</sup> Streets	Capital/presently unfunded Launched in 2009, closed in 2013 \$12 million; \$3 million went to Queen Theater

### **Notes:**

Wilmington's definition of small business different from fed – larger scale

ED office is intake point and then route to right agency for help

- Work with WEDCO (Wilmington ED Council) – get funding from City, EDA, SBA and First State Community Loan (state-wide)
- Can help someone with idea but no business plan – set up with state SBDC – get consultant assigned

Abatement of wage taxes not done

In city, 50% of property taxes to city, 45% school, 5% county

No other City in NCC charges wage tax

**EXHIBIT 19: UNION ELECTIONS (2006 - 2013)**

Source: National Labor Relations Board

Employer	Union Name	SIC Code	Unit	Location	Votes For Union	Votes Against Union	Outcome of Election	Date
Extencicare Arbors at New Castle	Food & Commercial Workers	27	4-RC-21062	New Castle, DE 19720	22	22	Company	7/21/2006
Prince Minerals	Teamsters	326	4-RC-21204	New Castle, DE 19720	12	17	Company	11/16/2006
NARS of Delaware, LLC	Teamsters	326	4-RC-21197	Wilmington, DE 19804	2	4	Company	11/21/2006
Delaware & Importers, LLC	Teamsters	326	4-RC-21223	New Castle, DE 19720	6	35	Company	12/27/2006
Allied Building Products	Teamsters	326	4-RC-21235	New Castle, DE 19720	4	0	Union	12/28/2006
Diamond State Youth, Inc.	Communication Workers		4-RC-21238	Wilmington, DE 19809	12	1	Union	1/31/2007
Perdue Farm, Inc.	Food & Commercial Workers	27	5-RD-1413	Milford, DE 19963	14	7	Union	2/13/2007
Wanex Electrical Services, Inc.	Electrical Workers	313	5-RD-1417	New Castle, DE 19720	1	7	Company	3/19/2007
Air Liquide / Medal	Teamsters	326	4-RC-21269	Newport, DE 19804	16	21	Company	4/10/2007
Walker International Transportation	Laborers	199	4-RC-21297	New Castle, DE 19720	30	79	Company	7/3/2007
Broadmeadow Nursing & Rehab Center	Food & Commercial Workers	27	4-RC-21304	Middletown, DE 19709	15	47	Company	7/24/2007
Claymont Steel	Steelworkers		4-RC-21329	Claymont, DE 19703	72	246	Company	9/24/2007
Minquadale Fire Company	Fire Fighters	4417	4-RC-21352	New Castle, DE 19720	7	0	Union	11/7/2007
Claymont Fire Company	Fire Fighters	4417	4-RC-21351	Claymont, DE 19703	2	1	Union	11/19/2007
Goodwill Fire Company	Fire Fighters	4417	4-RC-21349	New Castle, DE 19720	5	0	Union	11/19/2007
Wilmington Manor, Fire Company	Fire Fighters	4417	4-RC-21350	New Castle, DE 19720	4	2	Union	11/23/2007
Ceramic Protection Corp	Teamsters	326	4-RC-21363	Newark, DE 19720	15	44	Company	12/18/2007
Linde Group	Teamsters	326	4-RC-21373	Claymont, DE 19703	13	26	Company	1/22/2008
AT Systems Atlantic Garden	Special Police and Security Officers		4-RC-21381	Wilmington, DE 19802	25	67	Company	2/19/2008
Mill Creek Fire Company	Fire Fighters	4417	4-RC-21402	Marshallton, DE 19808	5	0	Union	4/16/2008
Minguas Fire Company	Fire Fighters	4417	4-RC-21405	Newport, DE 19804	5	1	Union	4/16/2008
AT&T Mobility	Communication Workers	13-100	4-RD-2140	New Castle, DE 19720	4	1	Union	6/5/2008
The Rockford Center	Teamsters	326	4-RC-21436	Newark, DE 19713	19	138	Company	6/24/2008
South Gate Concrete	Teamsters	326	4-RC-21453	Middletown, DE 19709	17	11	Union	7/22/2008
First Student, Inc.	Teamsters	326	4-RC-21485	Newark, DE 19713	105	7	Union	10/15/2008
Ingleside Assisted Living	Food & Commercial Workers	27	4-RC-21483	Wilmington, DE 19806	10	1	Union	10/21/2008
Ruan	Teamsters	326	4-RC-21489	Middletown, DE 19709	21	3	Union	11/5/2008
Foulk Manor South	Teamsters	326	4-RC-21523	Wilmington, DE 19803	5	38	Company	3/13/2009
Advanced Student Transportation	Teamsters	326	4-RC-21599	Wilmington, DE 19804	84	66	Union	11/17/2009
Coolersmart USA	Machinists & Aerospace Workers	1	4-RC-21606	New Castle, DE 19720	9	16	Company	12/28/2009
Cushman & Wakefield	Plumbers & Pipe Fitters	74	4-RC-21623	Newark, DE 19713	12	3	Union	1/25/2010
Burriss Logistics	Teamsters	326	4-RC-21627	New Castle, DE 19720	16	10	Union	2/1/2010
Diamond State Youth, Inc.	Communication Workers	13100	4-RD-2171	Wilmington, DE 19809	1	7	Company	2/25/2010
Jones Lang LaSalle Americas, Inc.	Plumbers & Pipe Fitters	74	4-RC-21644	Wilmington, DE 19801	4	0	Union	3/11/2010
United Water Delaware	Utility Workers	584	4-RD-2177	Wilmington, DE 18904	2	3	Company	7/6/2010
Eastern Shore Services Inc.	Electrical Workers	313	4-RC-21771	Wilmington, DE 19804	140	11	Union	1/24/2011
Burriss Logistics	Teamsters		4-RD-002199	New Castle, DE	10	2	Company	3/23/2011
Martin Newark Dealership, Inc. and Scott Newark, Inc.	Machinists & Aerospace Workers		4-RC-066539	Newark, DE	0	8	Union	12/2/2011
Martin Newark Dealership, Inc. and Scott Newark, Inc.	Machinists & Aerospace Workers		4-RC-066539	Newark, DE	9	20	Union	12/7/2011
Hart to Heart Ambulance Service	Teamsters		4-RC-067953	Wilmington, DE	1	15	Union	12/14/2011
Eastern Shore Services Inc.	Electrical Workers		4-RC-021771	Wilmington, DE	11	140	Union	1/13/2011
Garda World Security Corporation d/b/a Garda CL Atlantic, Inc.	Security, Police and Fire		4-RC-021786	Wilmington, DE	66	32	Company	3/10/2011
Contractors Hauling, LLC	Teamsters		4-RC-070118	Bear, DE	7	10	Union	7/11/2012
Bay Shippers LLC	Teamsters		4-RC-115726	New Castle, DE	27	14	Company	11/29/2013
Amerigas Propane	Teamsters		4-RC-115889	New Castle, DE	11	2	Company	12/5/2013

## **EXHIBIT 20: MAJOR WILMINGTON CITY EMPLOYERS: 2013**

Source: City of Wilmington

<b>Employer</b>	<b>Employees</b>
STATE OF DELAWARE	7,655
CHRISTIANA CARE HEALTH SYSTEMS	4,168
CHASE BANK USA NA	3,944
E I DUPONT DE NEMOURS & CO	1,982
CAPTIAL ONE SERVICES II LLC	1,951
CITY OF WILMINGTON	1,707
INTEGRITY STAFFING SOLUTIONS	1,560
BARCLAYS BANK DE	1,357
ST FRANCIS HOSPITAL	1,247
JP MORGAN CHASE BANK NA	1,172
NATIONAL RR PASSENGER CORP	1,155
FIA CARD SERVICES NA	1,054
BAYADA NURSES INC	795
KELLY SERVICES INC	794
HIGHMARK BCBS OF DELAWARE INC	740
HOSPITALITY STAFFING	694
DELAWARE RIVER STEVEDORES INC	643
FSQ INC	643
DELAWARE TRANSIT CORP	598
WILMINGTON TRUST CO	550
CONNECTIONS/CSP INC	538
MURPHY MARINE SERVICE INC	538
UNIVERSITY OF DELAWARE	514
BANK OF AMERICA NA	513
SHOP RITE	498
WIDENER UNIVERSITY	491
DIAMOND STATE PORT CORP	462
YMCA OF DELAWARE	452
AAA MID-ATLANTIC INC	428
WALMART	424
U S DEPT OF AGRICULTURE	406
MCDONALDS RESTAURANTS OF DE	393
ALLIEDBARTON SECURITY SERV LLC	375
DELMARVA TEMPORARY STAFFING INC	366
DELAWARE CLAIMS PROCESSING FAC	345



## **EXHIBIT 21: NEW EMPLOYER LOCATIONS INTO WILMINGTON (2009-2013)**

Source: City of Wilmington

<b>StartDate</b>	<b>Employer</b>	<b>2013 Employment</b>
1/17/2009	FIRST STUDENT MANAGEMENT, LLC	N/A
2/26/2009	HERSHA HOSPITALITY MGMT	57
3/1/2009	HOME HELPERS	N/A
4/27/2009	SLM DE CORPORATION	56
5/4/2009	MORGAN STANLEY SMITH BARNEY PA	N/A
5/19/2009	COLLECTIONS MARKETING CENTER	51
6/10/2009	CHRYSLER GROUP LLC	N/A
7/6/2009	BIG FISH WILMINGTON LLC	N/A
7/13/2009	HEALY LONG CONCRETE CONTRACTOR	108
7/15/2009	GENERAL MOTORS COMPANY	66
10/19/2009	ENERFAB INC	N/A
11/9/2009	BERTUCCI'S RESTUARANT CRP	118
1/1/2010	BFI WASTE SERVICES LLC	92
1/1/2010	CABSUMMER LLC	N/A
1/1/2010	SALLIE MAE INC	51
1/1/2010	THE FRESH GROCER	177
1/1/2010	THRIVE HR AD LLC	N/A
1/1/2010	VOLT MANAGEMENT CORP	N/A
1/30/2010	COMMUNITY ALTERNATIVE OF	N/A
3/12/2010	CHELSEA TAVERN	72
3/15/2010	ODYSSEY FOODS OF DELAWARE LLC	N/A
4/1/2010	FIRESTONE	N/A
5/1/2010	AUDI WILMINGTON	75
5/10/2010	INTERNATIONAL SECURITY LLC	N/A
6/4/2010	COLUMBUS INN	107
6/21/2010	PIONEAR	N/A
7/1/2010	COMPONENT ASSEMBLY SYSTEMS INC	114
7/1/2010	KFORCE INC	102
7/1/2010	PARKWAY ACADEMY	65
7/7/2010	RICK VANSTORY CENTER	62
7/23/2010	CORRECT CARE SOLUTIONS LLC	67
9/1/2010	KID SHELLEENS	115
10/20/2010	HOSPITALITY STAFFING	694
12/8/2010	EXTREME PIZZA	N/A
12/14/2010	METLIFE GROUP INC	319
1/1/2011	IHOP / BPF ENTERPRISES	N/A

## **EXHIBIT 21: NEW EMPLOYER LOCATIONS INTO WILMINGTON (2009-2013)**

Source: City of Wilmington

<b>StartDate</b>	<b>Employer</b>	<b>2013 Employment</b>
1/1/2011	SHAMROCKCLEAN INC	64
1/1/2011	DHM PAYROLL-DT WILMINGTON LLC	132
1/2/2011	CSAA INSURANCE EXCHANGE	N/A
2/21/2011	FARMERS GROUP INC	51
3/1/2011	JEVS SUPPORTS FOR INDEPENDENCE	165
3/1/2011	NORDSTROM	82
3/9/2011	POPEYES LOUISIANA KITCHEN	N/A
3/17/2011	WILCOX LANDSCAPING INC	N/A
4/1/2011	HILLSIDE CENTER	222
4/1/2011	WORLD CAFE LIVE AT THE QUEEN	127
5/1/2011	DELMARVA TEMPORARY STAFFING INC	366
8/8/2011	GRANT THORNTON LLP	N/A
8/19/2011	FIRST NATIONAL SERVICE	N/A
8/22/2011	DSJS	63
11/1/2011	CITICORP CREDIT SERVICES INC USA	222
11/1/2011	STAFFMARK HOLDINGS INC	N/A
1/1/2012	PROGRESSIVE EMPLOYER MANAGEMENT CO XXII	N/A
1/11/2012	ERNEST & SCOTT TAPROOM	79
5/4/2012	GANNETT PUBLISHING SERVICES LLC	91
7/1/2012	SKYY HOSPITALITY GROUP INC	51
8/22/2012	RECOVERY INNOVATIONS INC	77
8/29/2012	ALSCO INC	120
9/1/2012	CAPITAL ONE, NATIONAL ASSOCIATION	295
9/13/2012	KINSLEY MANUFACTURING	79
11/1/2012	CAPITAL ONE SERVICES III LLC	N/A
12/6/2012	MANOR CARE OF WILMINGTON DE	63
1/1/2013	FIRST STATE HOME CARE LLC	52
1/1/2013	PENN CINEMA RIVERFRONT LLC	88
1/18/2013	A & P LIVE BETTER LLC	66
1/22/2013	ING DIRECT INVESTING INC	91
1/22/2013	GIANT OF MARYLAND LLC	84
3/4/2013	NOVAK DRUCE CONNOLLY BOVE & QUIGG LLP	71
4/22/2013	HMS HOST TOLLROADS INC/DELAWARE HOUSE	51
7/7/2013	FRANK CRUM 1 INC	136

## **EXHIBIT 22: EMPLOYER EXPANSIONS (2009-2013)**

Source: City of Wilmington

<b>Employer</b>	<b>Employee Change</b>
CAPTIAL ONE SERVICES II LLC	1,951
JP MORGAN CHASE BANK NA	890
CHASE BANK USA NA	858
INTEGRITY STAFFING SOLUTIONS	831
HOSPITALITY STAFFING	694
BAYADA NURSES INC	494
FIA CARD SERVICES NA	493
CHRISTIANA CARE HEALTH SYSTEMS	485
DELMARVA TEMPORARY STAFFING INC	366
METLIFE GROUP INC	319
CAPITAL ONE, NATIONAL ASSOCIATION	295
CONNECTIONS/CSP INC	253
FSQ INC	243
NATIONAL RR PASSENGER CORP	239
CITICORP CREDIT SERVICES INC USA	222
HILLSIDE CENTER	222
E I DUPONT DE NEMOURS & CO	200
FIVE BELOW INC	199
MARSHALLS OF MA, INC	197
ACCESS LABOR SERVICE INC	192
IRON HILL BREWERY & RESTAURANT	181
SUNSTATES MAINTENANCE CORP	178
THE FRESH GROCER	177
JEVS SUPPORTS FOR INDEPENDENCE	165
MATRIX LLC	155
BATTAGLIA ELECTRIC INC	143
FRANK CRUM 1 INC	136
HORIZON SERVICES INC	136
DHM PAYROLL-DT WILMINGTON LLC	132
WORLD CAFE LIVE AT THE QUEEN	127
ALSCO INC	120
DELAWARE RIVER STEVEDORES INC	118
BERTUCCI'S RESTUARANT CRP	118
WALMART	117
ARAMARK FOOD & SUPPORT SERVICE	115

## **EXHIBIT 22: EMPLOYER EXPANSIONS (2009-2013)**

Source: City of Wilmington

KID SHELLEENS	115
SULLIVANS OF DELAWARE INC	114
COMPONENT ASSEMBLY SYSTEMS INC	114
AEROTEK INC	110
PLEXUS FITNESS LLC	110
ERNST & YOUNG	108
HEALY LONG CONCRETE CONTRACTOR	108
COLUMBUS INN	107
U S POSTAL SERVICE	104
SECURITAS SECURITY SERVICES	104
LONESTAR STEAKHOUSE	102
KFORCE INC	102
BJ S WHOLESALE CLUB INC	94
DELOITTE CONSULTING LLP	93
BFI WASTE SERVICES LLC	92
BOSTON MARKET #0404	92
GANNETT PUBLISHING SERVICES LLC	91
ING DIRECT INVESTING INC	91
BUILDER SERVICES GROUP INC	90
MUMFORD & MILLER CONCRETE	88
PENN CINEMA RIVERFRONT LLC	88
UNIVERSITY OF DELAWARE	87
PNC BANK NA	87
WELLS FARGO BANK NA	86
DELA HOSPICE INC	84
GIANT OF MARYLAND LLC	84
AETEA INFORMATION TECHNOLOGY	84
GMRI, INC	82
NORDSTROM	82
RALPH G DEGLIOBIZZI & SONS INC	80
ERNEST & SCOTT TAPROOM	79
KINSLEY MANUFACTURING	79
AAA MID-ATLANTIC INC	78
EXPRESS SERVICES INC	78
APPLE AMERICAN GROUP LLC	77
RECOVERY INNOVATIONS INC	77
DICKS CLOTHING/SPORTING GOODS	77

## **EXHIBIT 22: EMPLOYER EXPANSIONS (2009-2013)**

Source: City of Wilmington

FAMILY DOLLAR STORES OF DE INC	76
TRI-COUNTY SECURITY NJ	76
MCKINSEY & COMPANY INC	75
HOME INSTEAD SENIOR CARE	75
AUDI WILMINGTON	75
KPMG LLP	74
FIRST CHOICE CLEANING	73
NEMOURS FOUNDATION	72
ACCENTURE LLP	72
CHELSEA TAVERN	72
CORP SERVICE CO	71
NOVAK DRUCE CONNOLLY BOVE & QUIGG LLP	71
GERIATRIC SERVICES OF DE INC	70
M DAVIS & SONS INC	70
CONSOLIDATED LLC	70
PIER 1 IMPORTS #751	68
DELAWARE DOCUMENT IMAGING LLC	68
ABERCROMBIE & FITCH STORES INC	68
K MART CORPORATION	67
T J MAXX	67
BURRIS REFRIGERATED LOGISTICS	67
CORRECT CARE SOLUTIONS LLC	67
I D GRIFFITH INC	66
A & P LIVE BETTER LLC	66
GAMESTOP INC	66
COLLABERA INC	66
GENERAL MOTORS COMPANY	66
PARKWAY ACADEMY	65
THE ARCHER GROUP	64
SHAMROCKCLEAN INC	64
DSJS	63
MANOR CARE OF WILMINGTON DE	63
RAINBOW USA INC	63
CHALLENGE PROGRAM	62
RICK VANSTORY CENTER	62
ADVANCED STUDENT TRANSPORTATION, INC.	61
AMERICAN BEAUTY ACADEMY	61

## **EXHIBIT 22: EMPLOYER EXPANSIONS (2009-2013)**

Source: City of Wilmington

DISCOVER BANK	60
PLANNED PARENTHOOD OF DE INC	60
BRANDYWINE WOMEN'S HEALTH	60
STANDARD DISTRIBUTING CO INC	60
DELAWARE CHILDRENS MUSEUM	59
OLD NAVY LLC	59
BLUE PARROT BAR & GRILL	58
FIDELITRADE INCORPORATED	57
HERSHA HOSPITALITY MGMT	57
WILM SENIOR CENTER INC	56
FORMAN MILLS INC	56
SOUTHERN WINE & SPIRITS OF DEL	56
SLM DE CORPORATION	56
BOSCOV'S DEPT STORE LLC	55
EYE PHYSICIANS & SURGEONS PA	55
SAVE-A-LOT FOOD STORES	55
MRS ROBINOS RESTAURANT INC	55
TEKSYSTEMS INC	55
SIMM ASSOCIATES INC	55
TIMOTHY'S OF DELAWARE LLC	55
MACY'S	54
AMAZON.COM.DEDC INC	54
MILTON&HATTIE KUTZ HOME INC	54
MODERN CONTROLS INC	54
POLICE ATHLETIC LEAGUE OF WILM	54
DYNAMIC THERAPY SERVICES LLC	54
TRELLIST TECHNICAL STAFFING IN	54
CHILDREN AND FAMILIES FIRST DE	53
KOHL'S DEPARTMENT STORES INC	53
J F SOBIESKI MECH CONTR INC	53
HILLTOP LUTHERAN	53
SUPERIOR ELECTRIC SERVICE CO	53
MELTING POT	53
ALN CONSTRUCTION INC	53
OTIS ELEVATOR COMPANY	53
INTERCONTINENTAL SERVICES OF D	53
SELECT EMPLOYMENT SERVICES INC	52

## **EXHIBIT 22: EMPLOYER EXPANSIONS (2009-2013)**

Source: City of Wilmington

SPACECON LLC	52
FRANKLIN FIBRE LAMITEX CORP	52
FIRST STATE HOME CARE LLC	52
AUTOZONERS, LLC	52
COUNTY INSULATION COMPANY	51
BANCROFT CONSTRUCTION CO	51
SKYY HOSPITALITY GROUP INC	51
HMS HOST TOLLROADS INC/DELAWARE HOUSE	51
COLLECTIONS MARKETING CENTER	51
SALLIE MAE INC	51
FARMERS GROUP INC	51
CHRISTIANA CARE HOME HEALTH	50
ADVANCE CENTRAL SERVICES INC	50
IBM CORPORATION	50
WOHLSEN CONSTRUCTION CO	50
UNITED WAY OF DE INC	50
SIMPLEXGRINNELL LP	50
ELITE CLEANING CO INC	48
TATA CONSULTANCY SERVICES	48
ALLIEDBARTON SECURITY SERV LLC	47
COLONIAL PARKING INC	46
APPLEONE EMPLOYMENT SERVICES	46
MCDONALDS RESTAURANTS OF DE	45
WILMINGTON SAVINGS FUND SOCIET	43
LEXUS OF WILMINGTON	43
BANK OF AMERICA NA	41
BRANDYWINE COUNSELING INC	41
THE BRICKMAN GROUP LTD LLC	41
ACME MARKET #7808	40
WEST END NEIGHBORHOOD HSE	40
DELA THEATRE CO INC	39
SODEXHO OPERATIONS LLC	38
DISABATINO MAINTENANCE CORP	37
BREW HA HA . INC	31
WESTSIDE HEALTH INC	30
DELOITTE & TOUCHE LLP	30
JOHNSON & JOHNSON SERVICES INC	28

## **EXHIBIT 22: EMPLOYER EXPANSIONS (2009-2013)**

Source: City of Wilmington

WL GORE & ASSOCIATES	26
DELAWARE TRANSIT CORP	24
GOLDEY BEACOM COLLEGE	24
VOLUME SERVICES INC	24
LATIN AMERICAN COMMUNITY	23
MURPHY MARINE SERVICE INC	21
WILMINGTON UNIVERSITY,INC	21
THE LORELTON	21
PFPC INC	20
DIAMOND STATE PORT CORP	19
DELMARVA POWER & LIGHT COMPANY	19
THE TRI-M GROUP LLC	19
RCC BRANDYWINE	19
ST ANTHONY COMM CTR	18
BANK OF AMERICA CORP	18
DOCTORS FOR EMERGENCY SER PA	18
VERIZON CORPORATE SERVICES	18
DELAWARE MOTOR SALES INC	17
GOODWILL INDUSTRIES OF DE	16
DELAWARE CLAIMS PROCESSING FAC	14
REGENCY HEALTHCARE & REHAB CEN	14
SALESIANUM SCHOOL INC	14
PMTA-ILA VACATION FUND	14
WAWA INC	14
DELAWARE RESTAURANTS LP	13
KENTMERE NURSING CARE CENTER	12
WILMINGTON HEAD START INC	12
MERRIL LYNCH PIERCE FENNER	12
G4S SECURE SOLUTIONS(USA)INC	11
LUTHERAN SR SERVICES INC	11
COUNTY ENVIRONMENTAL COMPANY	11
J & J STAFFING RESOURCES INC	10
GARDA CL ATLANTIC INC	10
HOME FOR AGED WOMEN	8
ANESTHESIA SERVICES PA	8
U S DEPT OF AGRICULTURE	7
ROBERT HALF OF PENNSYLVANIA	5



## **EXHIBIT 22: EMPLOYER EXPANSIONS (2009-2013)**

*Source: City of Wilmington*

SOUTHBRIDGE MED ADVISORY	5
DANELLA LINE SERVICES INC	5
SUPER FRESH FOOD MKT INC	4
MCCARTER & ENGLISH LLP	4
BPG REAL ESTATE SERVICES LLC	3
FRANK W DIVER INC	3
CORPORATION TRUST	3
MARON MARVEL BRADLEY & ANDERSON LLC	3
ST MICHAELS DAY NURSERY INC	3
TYBOUT REDFEARN & PELL	3
ASHBY & GEDDES P A	3
PHI SERVICE COMPANY	2
WILMINGTON JOB CORPS CENTER	2
PMTA-ILA CONTAINERIZATION FUND	2
HECKLER & FABIZZIO PA	2
INDEPENDENT SCHOOL MGMT INC	2
FRIENDSHIP HOUSE INC	2
TD BANK NA	2
THE WOOD COMPANY	1
WASHINGTON STREET ALE HOUSE	1
PADUA ACADEMY	1

## **EXHIBIT 23: ELECTRIC UTILITIES**

*Source: Edison Electric Institute, Local Providers*

	<b>Delmarva Power &amp; Light Company</b>
Total Average Commercial Rate (cents/kWh)	10.36
Total Average Industrial Rate (cents/kWh)	5.14

## **EXHIBIT 24: WATER AND SEWER UTILITIES**

Source: City of Wilmington

<b>Water</b>		<b>City of Wilmington</b>	
Communities Served		City of Wilmington	
Total Capacity (MGD)		Data not available	
Average Demand (MGD)		Data not available	
Peak Demand (MGD)		Data not available	
Expansion Plans		Data not available	
Connect Fees		Data not available	
Rates		Data not available	
Pretreatment Information: EPA has to approve pretreatment plans for industrial wastes at each plant.		Wilmington WWTP has an active pretreatment program with county sources managed by NCCO.	
<b>Sewer</b>			
Name of Plant		Wilmington WWTP	
Utility		City of Wilmington	
Communities Served		NCCO north of canal	
Type of Treatment Used		Secondary	
Total Capacity (MGD)		135	
Average Inflow (MGD)		80	
Peak Inflow (MGD)		Data not available	
Expansion Plans		Data not available	
Connect Fees		Data not available	
Rates - Major Users		Data not available	
Pretreatment Information: EPA has to approve pretreatment plans for industrial wastes at each plant.		Wilmington WWTP has an active pretreatment program with county sources managed by NCCO.	

## **EXHIBIT 25: WHERE WORKERS LIVE WHO ARE EMPLOYED IN WILMINGTON: 2002 AND 2011**

Source: US Census On the Map

### **Total Primary Jobs**

Category	2011	
	Count	Share
Total Primary Jobs	51,335	100%

### **Jobs Counts by Places (Cities, CDPs, etc.) Where Workers Live - Primary Jobs**

Cities	2011	
	Count	Share
Wilmington city, DE	7,568	14.7%
Hockessin CDP, DE	1,108	2.2%
Bear CDP, DE	981	1.9%
Newark city, DE	879	1.7%
Glasgow CDP, DE	847	1.6%
Middletown town, DE	822	1.6%
Pike Creek Valley CDP, DE	787	1.5%
Philadelphia city, PA	771	1.5%
North Star CDP, DE	676	1.3%
Pike Creek CDP, DE	626	1.2%
All Other Locations	36,270	70.7%
<b>Commute into the City</b>	<b>43,767</b>	<b>85.3%</b>

Counties	2011	
	Count	Share
New Castle County, DE	35,353	68.9%
Chester County, PA	3,417	6.7%
Delaware County, PA	2,461	4.8%
Kent County, DE	2,118	4.1%
Sussex County, DE	1,645	3.2%
Cecil County, MD	1,343	2.6%
Philadelphia County, PA	771	1.5%
Gloucester County, NJ	711	1.4%
Salem County, NJ	689	1.3%
Montgomery County, PA	440	0.9%
All Other Locations	2,387	4.6%
<b>Commute into the City from outside of the County</b>	<b>15,982</b>	<b>31.1%</b>

## **EXHIBIT 26: WHERE WILMINGTON RESIDENTS WORK: 2002 AND 2011**

Source: US Census On the Map

### **Total Primary Jobs**

Category	2011	
	Count	Share
Total Primary Jobs	28,313	100%

### **Jobs Counts by Places (Cities, CDPs, etc.) Where Workers are Employed - Primary Jobs**

Cities	2011	
	Count	Share
Wilmington city, DE	7,568	26.7%
Philadelphia city, PA	1,032	3.6%
Newark city, DE	697	2.5%
New Castle city, DE	480	1.7%
Dover city, DE	444	1.6%
Elsmere town, DE	337	1.2%
Brookside CDP, DE	312	1.1%
Hockessin CDP, DE	251	0.9%
Claymont CDP, DE	212	0.7%
Glasgow CDP, DE	197	0.7%
All Other Locations	16,783	59.3%
Commute out of the city	20,745	73.3%

Counties	2011	
	Count	Share
New Castle County, DE	21,152	74.7%
Delaware County, PA	1,093	3.9%
Philadelphia County, PA	1,032	3.6%
Chester County, PA	872	3.1%
Kent County, DE	682	2.4%
Montgomery County, PA	421	1.5%
Sussex County, DE	301	1.1%
Cecil County, MD	175	0.6%
Salem County, NJ	155	0.5%
Montgomery County, MD	153	0.5%
All Other Locations	2,277	8.0%
Commute out of the county	7,161	25.3%