

The image shows a spiral-bound notebook with a brown cover and a light brown, textured paper insert. The spiral binding is on the left side. The text is centered on the paper insert.

# Major Trends in Key Industries

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# Research Overview

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- 4 Identification of growth factors
- 4 CEO interviews
- 4 Survey design and sample identification
- 4 Survey administration
- 4 Results

# Interviews with CEOs

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<b>By State</b>	<b>Delaware</b>	<b>21</b>
	<b>Region</b>	<b>02</b>
<b>By County</b>	<b>New Castle</b>	<b>13</b>
	<b>Kent</b>	<b>04</b>
	<b>Sussex</b>	<b>04</b>
<b>By Industry</b>	<b>Manufacturing</b>	<b>10</b>
	<b>Services</b>	<b>07</b>
	<b>Agriculture</b>	<b>03</b>
	<b>Financial</b>	<b>03</b>



# Major Survey Dimensions

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- 4 **Regulatory Atmosphere**
- 4 **Government - Business Relations**
- 4 **Taxation**
- 4 **Transportation**
- 4 **Utilities**
- 4 **Education**
- 4 **Business-to-Business Climate**
- 4 **Labor Supply**
- 4 **Future Labor Needs**
- 4 **Business Trends**

# Sample Identification

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## 4 Representative of key industries

- Industries which drive economic growth
- Small but potential growth industries
- Including agriculture, services, financial, manufacturing and tourism

## 4 Representative of all Delaware Counties

## 4 Regional Comparisons

## 4 23% Response rate from Delaware sample

# Business Trends

<i>Business Trend</i>	<i>Database</i>	<i>Manufacture</i>	<i>Business Services</i>	<i>Other Services</i>	<i>Agricultural Products</i>	<i>Finance</i>
<i>Expansion/Growth</i>	92	93	94	78	80	93
<i>Acquire Business</i>	70	65	77	78	60	81
<i>Strategic Alliance</i>	70	59	78	72	60	81
<i>Diversification</i>	67	65	49	71	40	68
<i>Joint Venture</i>	60	58	54	86	80	56
<i>Mergers</i>	44	36	44	50	20	56
<i>Consolidation</i>	40	27	49	50	20	56
<i>Being Acquired</i>	40	38	39	58	20	44
<i>Divestiture</i>	22	21	21	22	20	31

# Growth Plans >5%

## % of Industry Group

<i>Job Category</i>	<i>Delaware</i>	<i>Manufacture</i>	<i>Business Services</i>	<i>Culture Services</i>	<i>Agricultural Products</i>	<i>Finance</i>
<b>Post Graduate</b>	14	14	6	25	0	13
<b>Experienced Manager</b>	21	27	21	43	20	25
<b>University Grad-Technical</b>	25	32	41	26	20	18
<b>University Grad-Non Tech</b>	18	14	24	35	20	38
<b>Tech/Community College</b>	19	23	18	24	20	0
<b>Trade Skills</b>	16	14	13	16	20	17
<b>High School Grad</b>	14	22	31	24	40	13
<b>Unskilled/Semi-skilled</b>	16	13	21	16	40	20

# Plans to Decline by > 3%

## % of Industry Group

<i>Job Category</i>	<i>Database</i>	<i>Manufacture</i>	<i>Business Services</i>	<i>Citizen Services</i>	<i>Agricultural Products</i>	<i>Finance</i>
<b>Post Graduate</b>	4	4	2	0	0	7
<b>Experienced Manager</b>	4	5	0	0	0	6
<b>University Grad-Technical</b>	2	2	0	0	0	6
<b>University Grad-Non Tech</b>	4	2	3	0	0	12
<b>Tech/Community College</b>	4	4	2	0	0	12
<b>Trade Skills</b>	8	9	5	0	0	0
<b>High School Grad</b>	10	16	5	0	0	13
<b>Unskilled/Semi-skilled</b>	17	27	10	11	0	20



# Availability of Recruits by Job Category - % of Sample Dissatisfied

<i>Job Category</i>	<i>Region Not Dissatisfied</i>	<i>Dissatisfied</i>	<i>New Castle</i>	<i>Kent</i>	<i>Sussex</i>
<b><i>Post Graduate</i></b>	<b>19</b>	<b>13</b>	<b>12</b>	<b>10</b>	<b>7</b>
<b><i>Experienced Manager</i></b>	<b>13</b>	<b>21</b>	<b>25</b>	<b>33</b>	<b>13</b>
<b><i>University Grad-Technical</i></b>	<b>29</b>	<b>20</b>	<b>18</b>	<b>31</b>	<b>13</b>
<b><i>University Grad-Non Tech</i></b>	<b>16</b>	<b>16</b>	<b>16</b>	<b>33</b>	<b>10</b>
<b><i>Tech/Community College</i></b>	<b>30</b>	<b>22</b>	<b>16</b>	<b>33</b>	<b>13</b>
<b><i>Trade Skills</i></b>	<b>25</b>	<b>27</b>	<b>28</b>	<b>30</b>	<b>21</b>
<b><i>High School Grad</i></b>	<b>23</b>	<b>31</b>	<b>37</b>	<b>36</b>	<b>19</b>
<b><i>Unskilled/Semi-skilled</i></b>	<b>14</b>	<b>27</b>	<b>36</b>	<b>30</b>	<b>20</b>

# Most Important Characteristics of Location: Government & Taxes

<i><b>Characteristic</b></i>	<i><b>% Important</b></i>
Savvy of Government Leaders	96
Assistance from Regulators	95
Corporate Income Tax	95
Personal Income Tax	94
Responsiveness of Regulators	91
Access to Government Leaders	91
Influence with Government Leaders	90
Access to Legislators	90
Gross Receipts Tax	89
Knowledgeable Attorneys	88
Influence in the Legislature	86

# Satisfaction with Government & Taxes

## Delaware versus Region

<i>Characteristic</i>	<i>% Satisfied</i>	
	<i>Delaware</i>	<i>Region</i>
Savvy of Government Leaders	90	74
Assistance from Regulators	84 --	81
Corporate Income Tax	93 +	68
Personal Income Tax	59 +	64
Responsiveness of Regulators	74 --	71
Access to Government Leaders	96 +	84
Influence with Gov. Leaders	89 +	77
Access to Legislators	97 +	87
Gross Receipts Tax	76 +	90
Knowledgeable Attorneys	97 +	90
Influence in the Legislature	89 +	77

+ Improvement, -- Decline over the past 3-5 years reported by Delaware sample.

# Satisfaction with Government & Taxes Delaware by County

<b><i>Characteristic</i></b>	<b><i>% Satisfied</i></b>			
	<b><i>DE</i></b>	<b><i>NC</i></b>	<b><i>KT</i></b>	<b><i>SX</i></b>
<b><i>Savvy of Government Leaders</i></b>	90	94	85	86
<b><i>Assistance from Regulators</i></b>	84	84	85	80
<b><i>Corporate Income Tax</i></b>	93	92	100	92
<b><i>Personal Income Tax</i></b>	59	61	64	57
<b><i>Responsiveness of Regulators</i></b>	74	68	85	93
<b><i>Access to Government Leaders</i></b>	96	94	100	100
<b><i>Influence with Gov. Leaders</i></b>	89	88	79	100
<b><i>Access to Legislators</i></b>	97	96	100	100
<b><i>Knowledgeable Attorneys</i></b>	97	97	100	92
<b><i>Influence in the Legislature</i></b>	89	90	86	92

# Most Important Characteristics of Location: Infrastructure

<i><b>Characteristic</b></i>	<i><b>% Important</b></i>
Roads and Highways	98
Electric Utilities	98
Information Technology	96
Technical/Community Education	95
University Education	94
Secondary Education	93
Vocational Education	93
Water Utilities	92
Waste Services	92
Primary Education	90

# Satisfaction with Infrastructure Delaware versus Region

<i>Characteristic</i>	<i>% Satisfied</i>	
	<i>Delaware</i>	<i>Region</i>
Roads and Highways	64--	63
Electric Utilities	94--	91
Information Technology	94--	92
Technical / CC Education	94+	90
University Education	97	97
Secondary Education	58--	77
Vocational Education	84+	83
Water Utilities	89--	93
Waste Services	91--	90
Primary Education	59--	80

Delaware respondents reporting + lower cost or -- higher cost than other locations.

# Satisfaction with Infrastructure Delaware by County

<b><i>Characteristic</i></b>	<b><i>% Satisfied</i></b>			
	<b><i>DE</i></b>	<b><i>NC</i></b>	<b><i>KT</i></b>	<b><i>SX</i></b>
<b><i>Roads and Highways</i></b>	64	59	69	86
<b><i>Electric Utilities</i></b>	94	97	93	93
<b><i>Information Technology</i></b>	94	94	85	100
<b><i>Technical / CC Education</i></b>	94	94	92	100
<b><i>University Education</i></b>	97	96	100	100
<b><i>Secondary Education</i></b>	58	60	46	62
<b><i>Vocational Education</i></b>	84	86	77	87
<b><i>Water Utilities</i></b>	89	86	85	100
<b><i>Waste Services</i></b>	91	89	92	93
<b><i>Primary Education</i></b>	59	58	61	69

# Characteristics of Differing Importance Across Counties

<i>Characteristic</i>	<i>New Castle</i>		<i>Kent</i>		<i>Sussex</i>	
	<i>% Important</i>	<i>% Satisfied</i>	<i>% Important</i>	<i>% Satisfied</i>	<i>% Important</i>	<i>% Satisfied</i>
<i>Environmental Reg.</i>	83	84	77	93	93	93
<i>Business Regulators</i>	94	88	100	100	85	100
<i>Building Permitting</i>	86	68	77	85	80	85
<i>Other Permitting</i>	86	77	77	92	80	93
<i>Gross Receipts Tax</i>	89	69	85	50	93	50
<i>Gas Utilities</i>	85	98	100	82	64	92



# Level of Satisfaction by Industry

<i>Location Category</i>	<i>Industry Cluster</i>				
	<i>Manufacturing</i>	<i>Business Services</i>	<i>Other Services</i>	<i>Agricultural Products</i>	<i>Finance</i>
<i>Infrastructure</i>		++	--	-	--
<i>Education</i>		++		++	
<i>Environment</i>	-	-	++		
<i>Government</i>	--	-	+		-
<i>Taxation</i>	--	-		+	-

++ much more favorable, + slightly more favorable

- slightly less favorable, -- much less favorable than the state average