

UNIQUELY DELAWARE

A closer look at what makes *The First State* special

Gary S. Laben, CEO

October 2020

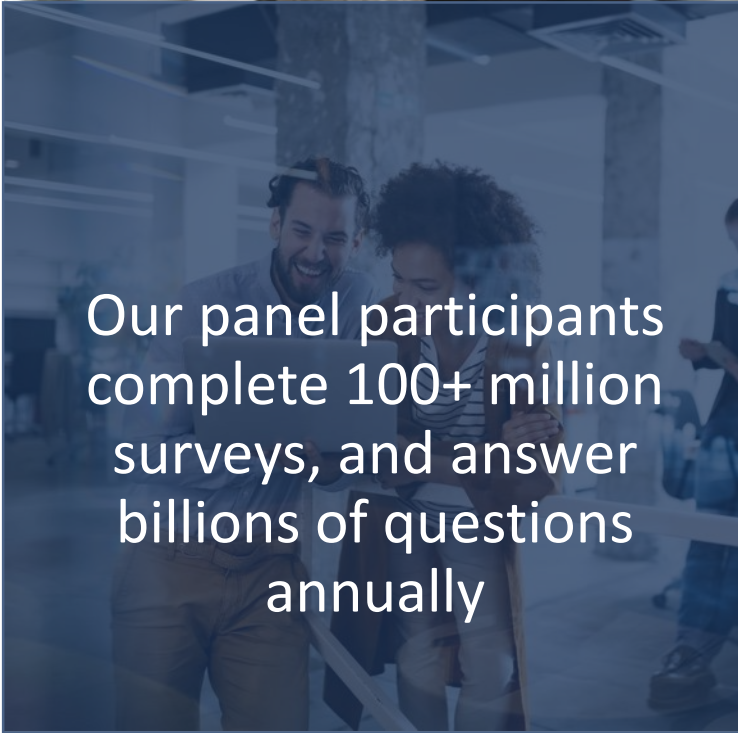


WHO IS DYNATA?

The world's largest first-party data and insights platform



More than 62 million
people in our panel –
consumers and business
professionals



Our panel participants
complete 100+ million
surveys, and answer
billions of questions
annually



40+ years' experience,
pioneer in our industry,
trusted by global brands
and organizations

We improve our clients' business and market understanding by connecting them to the interests, opinions, and actions from the world's largest repository of real people to strengthen their market research, business execution and promotion activities.

WHOM DID WE TALK TO?



Attractors Survey:

- **80,100 non-Delaware US citizens**
- 8608 expressed interest in moving to Delaware
- 805 followed up with in-depth survey

Residents Survey:

- **346 residents**, two thirds of whom moved to DE in past 10 years

Online (majority) + Phone (supplement) interviews

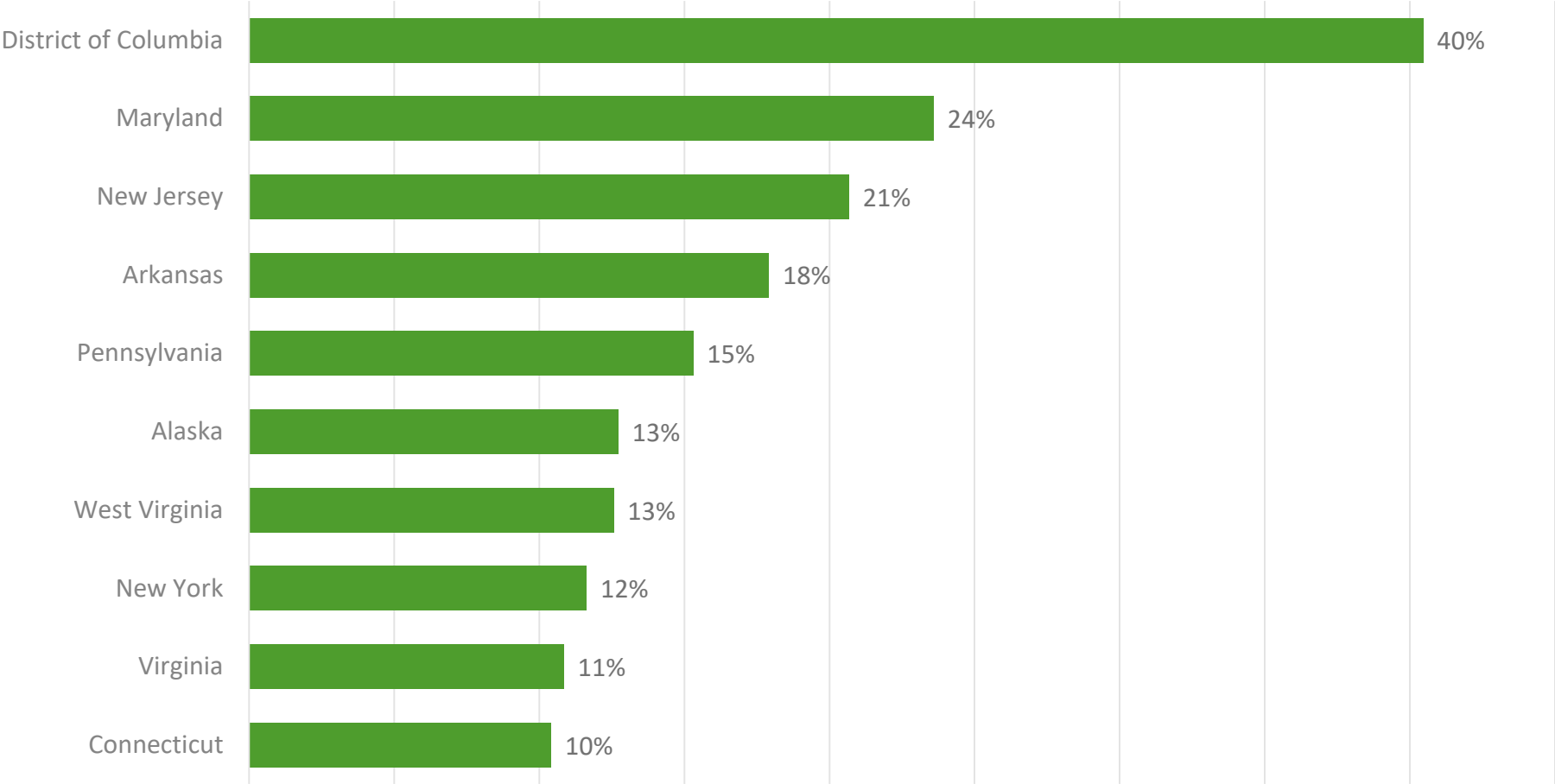
Surveyed between 9/18/20 and 9/23/20

**WHERE ARE PEOPLE
MOVING FROM?**



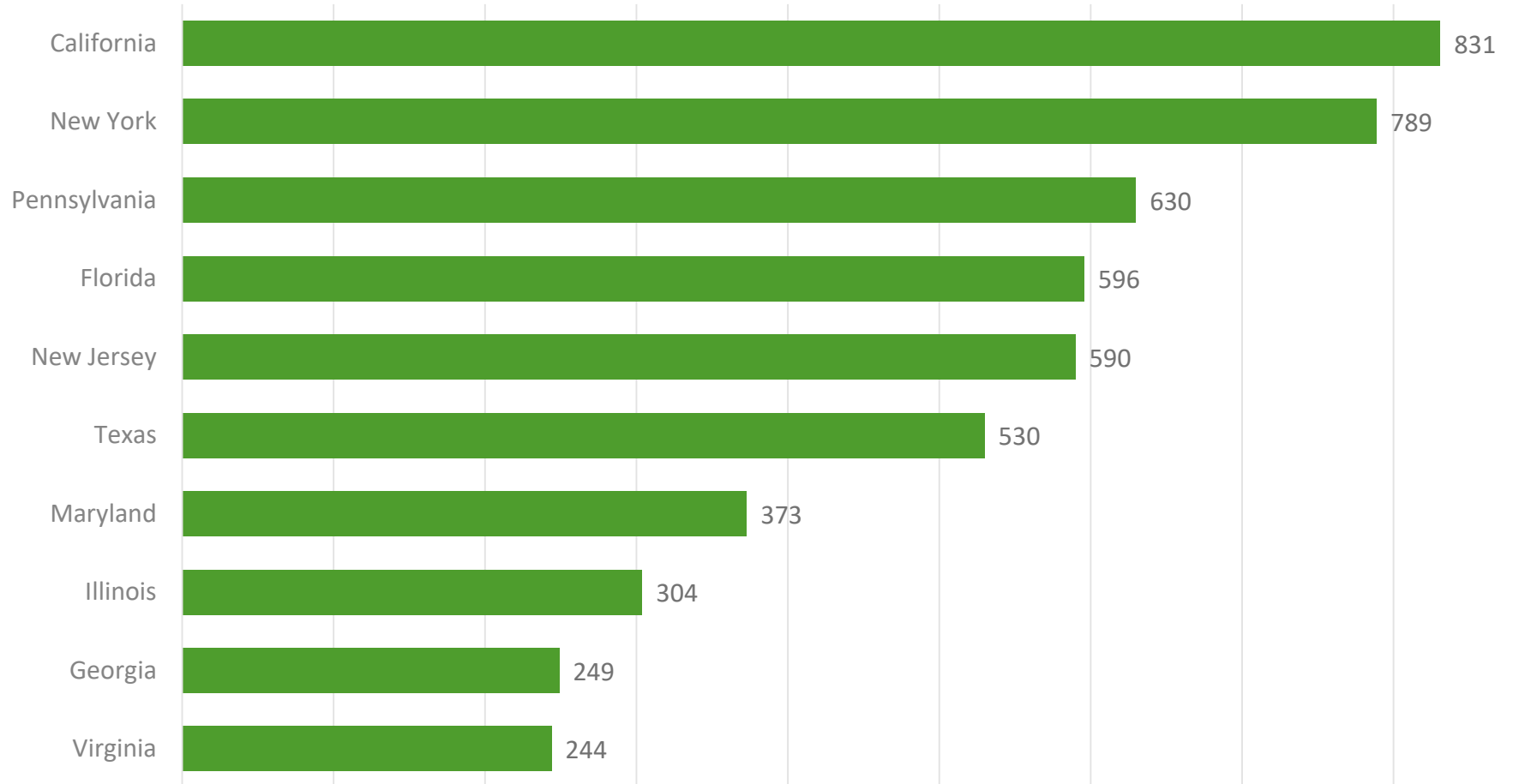
WHICH STATES HAVE RESIDENTS INTERESTED IN MOVING TO DELAWARE?

Top 10 States Interested in Moving to Delaware (by percentage)



WHICH STATES HAVE RESIDENTS INTERESTED IN MOVING TO DELAWARE?

Top 10 States Interested in Moving to Delaware (by number of people)



SURPRISINGLY INTERESTED?

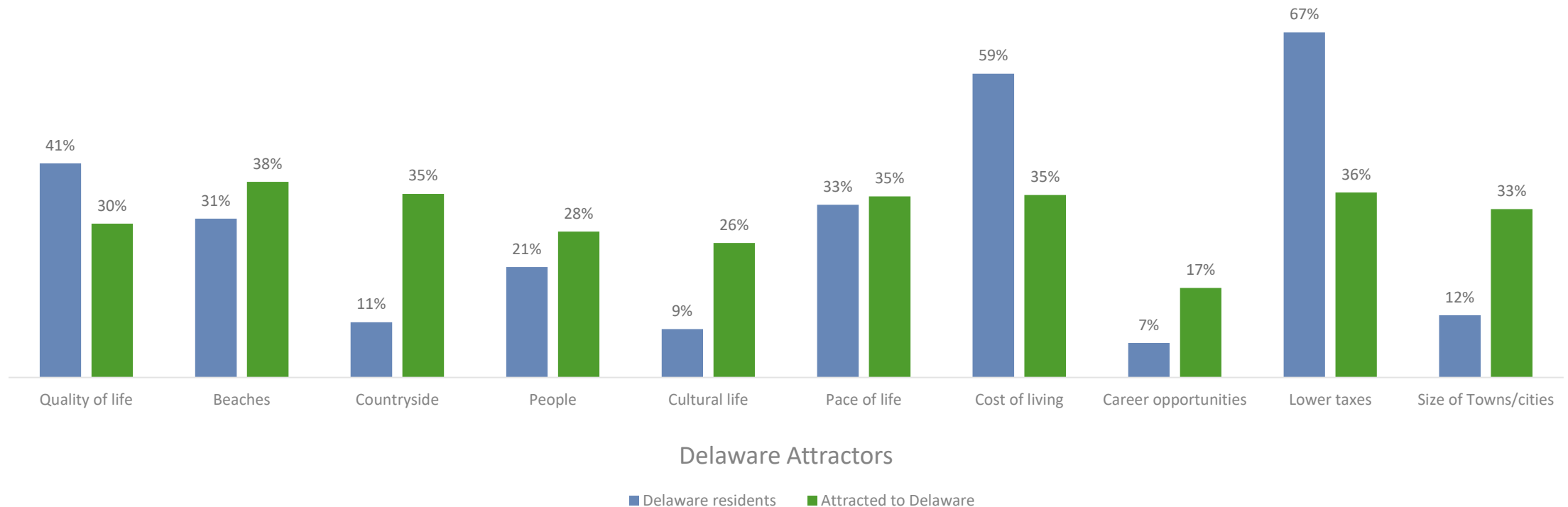


WHY PEOPLE ARE MOVING TO DELAWARE



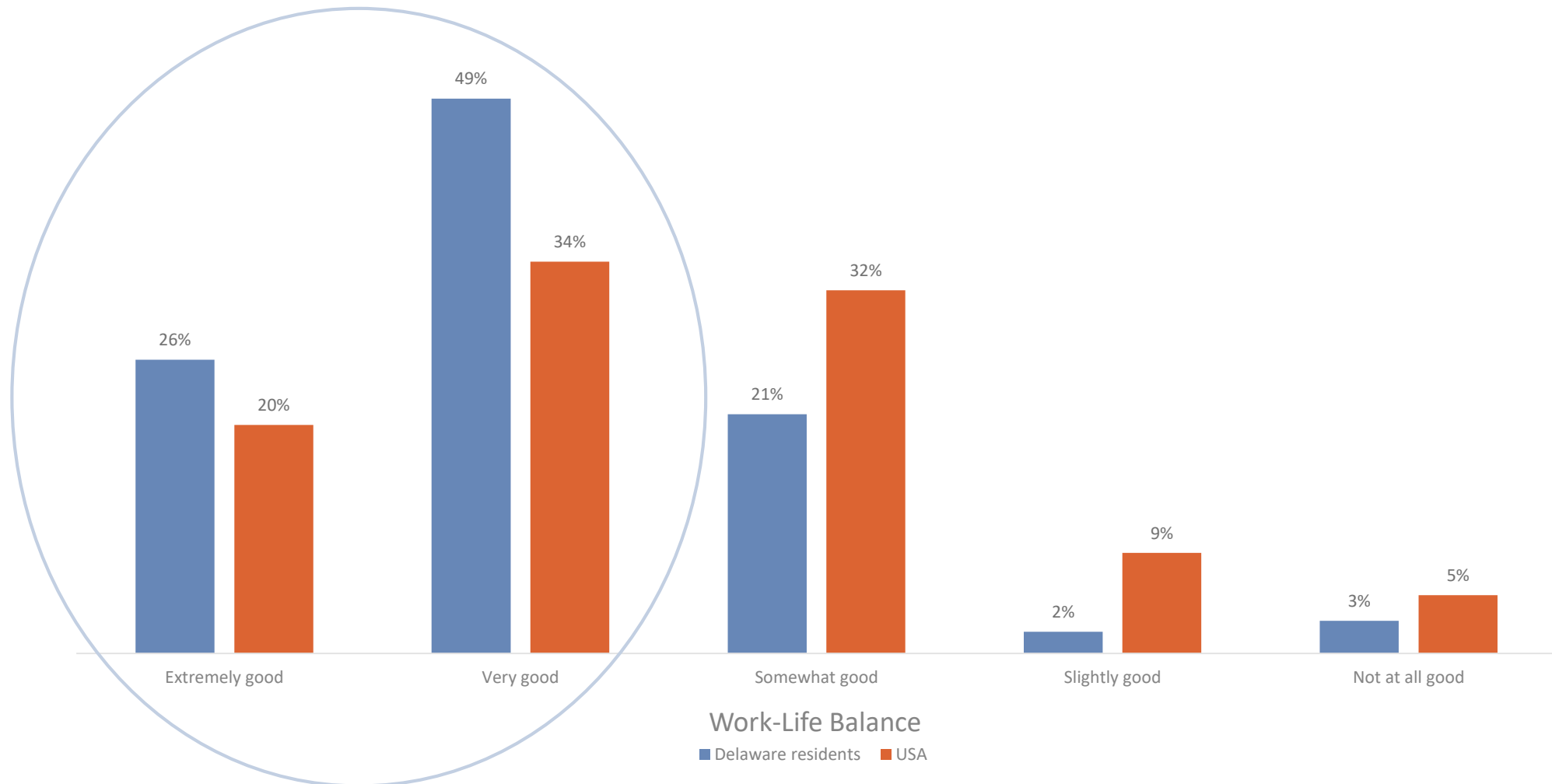
WHY ARE PEOPLE ATTRACTED TO DELAWARE?

While Delawareans say lower taxes, cost of living, and quality of life are the reasons they moved to DE, lower taxes are not the major driver in attracting people to the state.



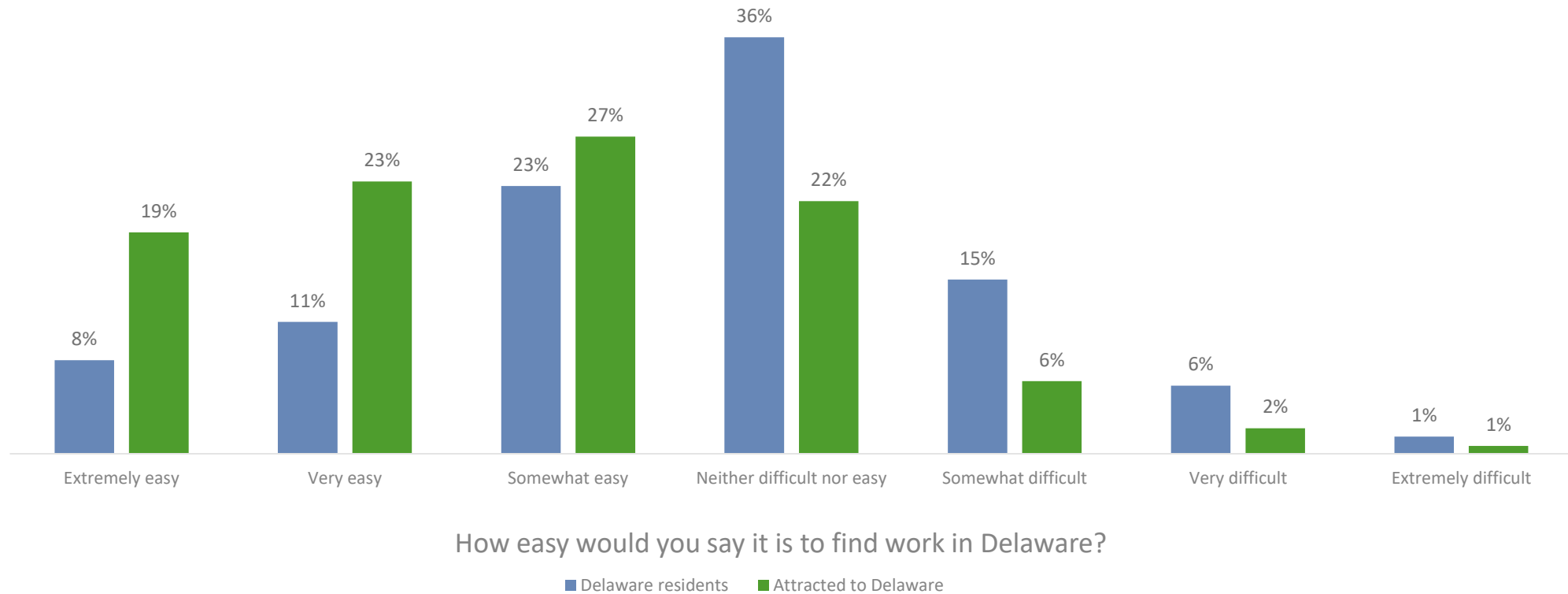
WHY ARE PEOPLE ATTRACTED TO DELAWARE?

Delaware residents positive about work-life balance



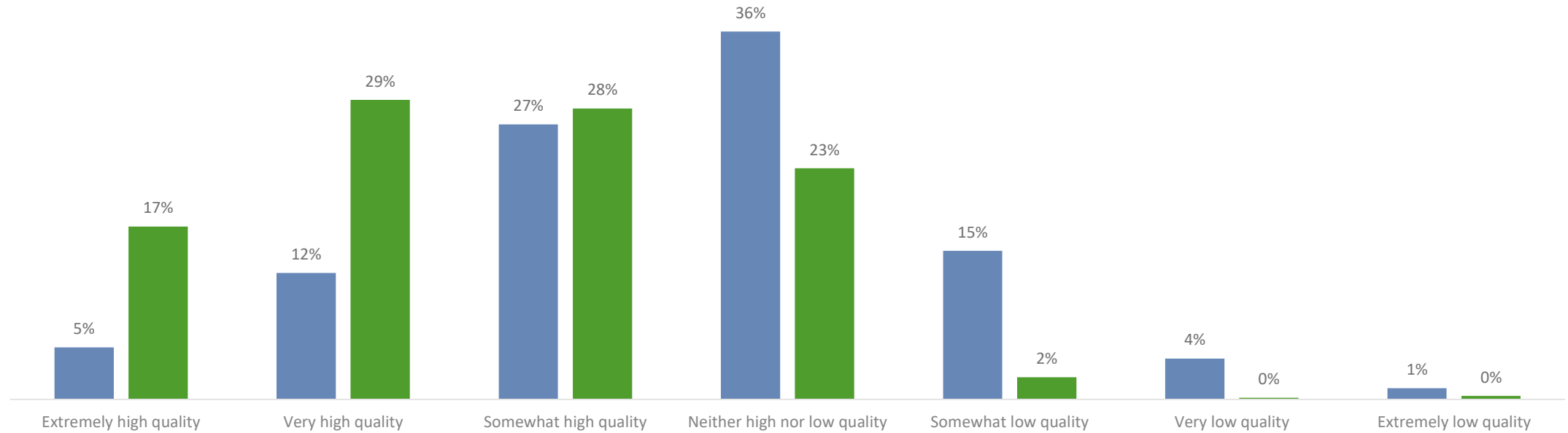
WHY ARE PEOPLE ATTRACTED TO DELAWARE?

Gap between those attracted to Delaware and residents on ease of finding work



WHY ARE PEOPLE ATTRACTED TO DELAWARE?

There is a job quality perception gap between residents and those attracted to Delaware

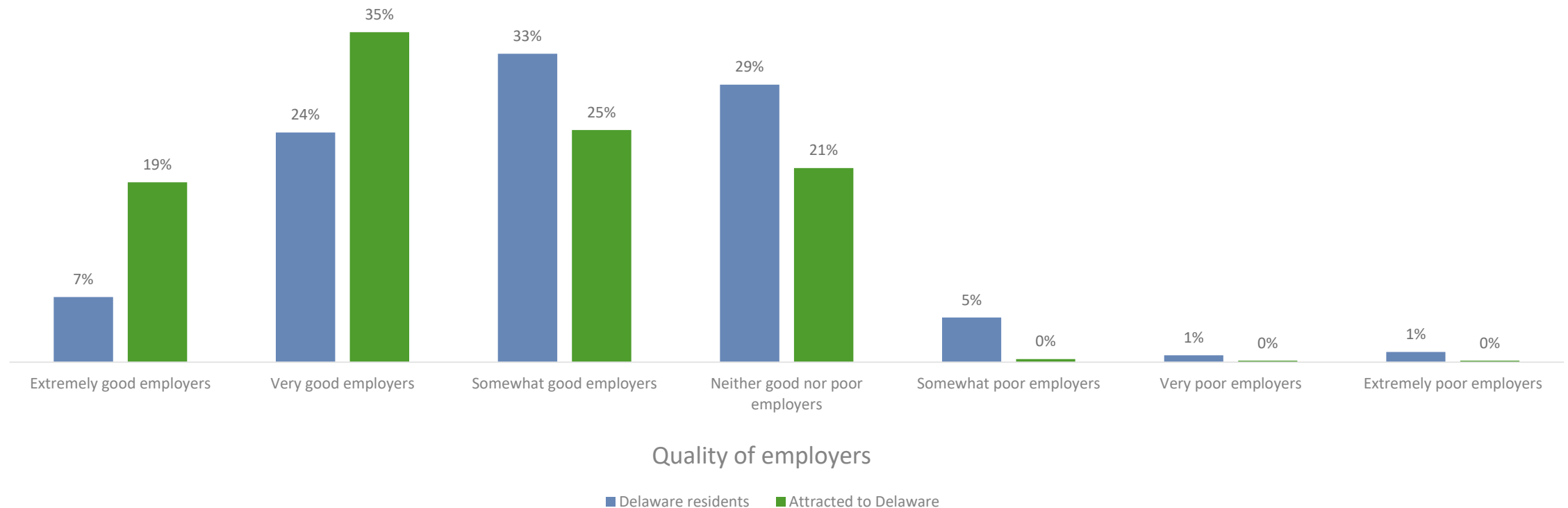


Quality of jobs that are available in Delaware, would you say they were...?

■ Delaware residents ■ Attracted to Delaware

WHY ARE PEOPLE ATTRACTED TO DELAWARE?

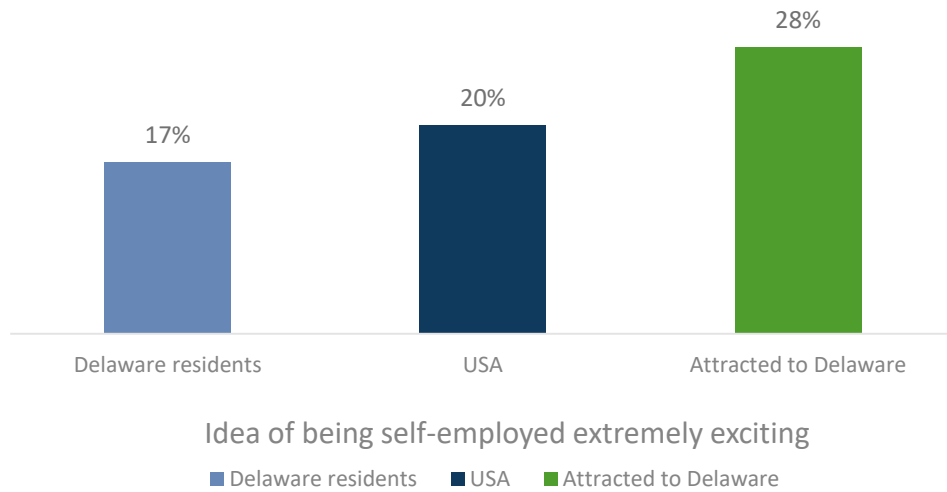
Employers are rated higher by those attracted to Delaware than by residents



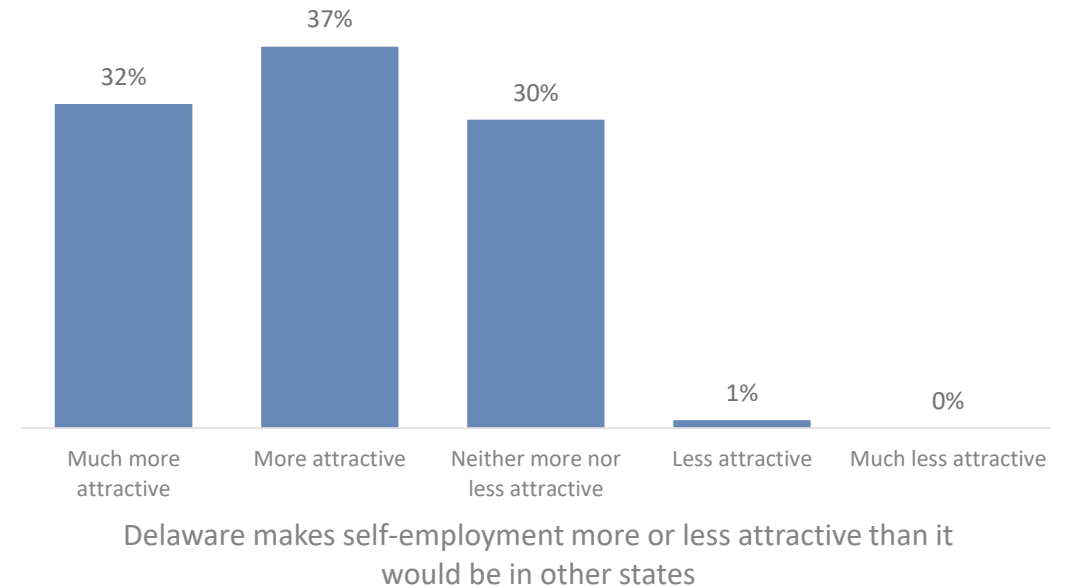
WHY ARE PEOPLE ATTRACTED TO DELAWARE?

Would-be entrepreneurs are attracted to Delaware – and residents agree it is an attractive environment for them

Prospective residents are more excited about entrepreneurship than in-state and US residents



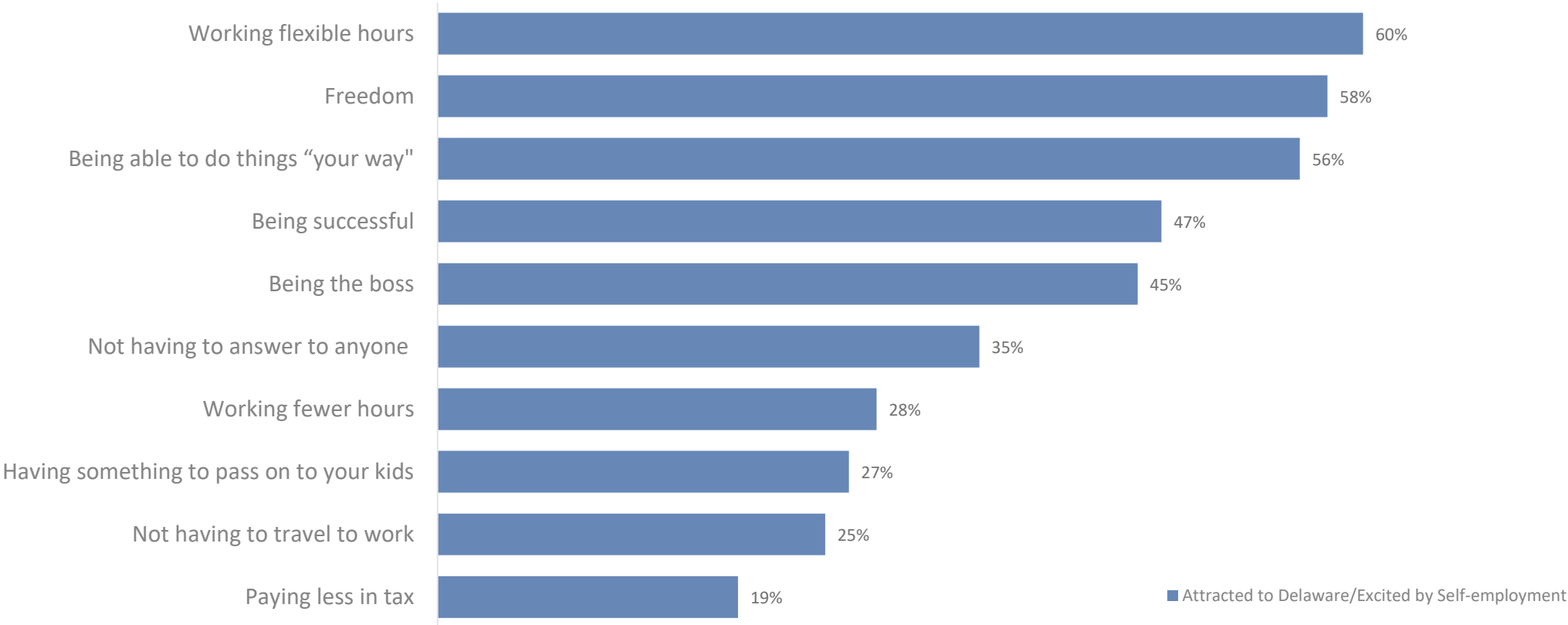
Nearly 70% of Delawareans believe entrepreneurship/self-employment is more attractive in Delaware



WHY ARE PEOPLE EXCITED ABOUT SELF EMPLOYMENT?

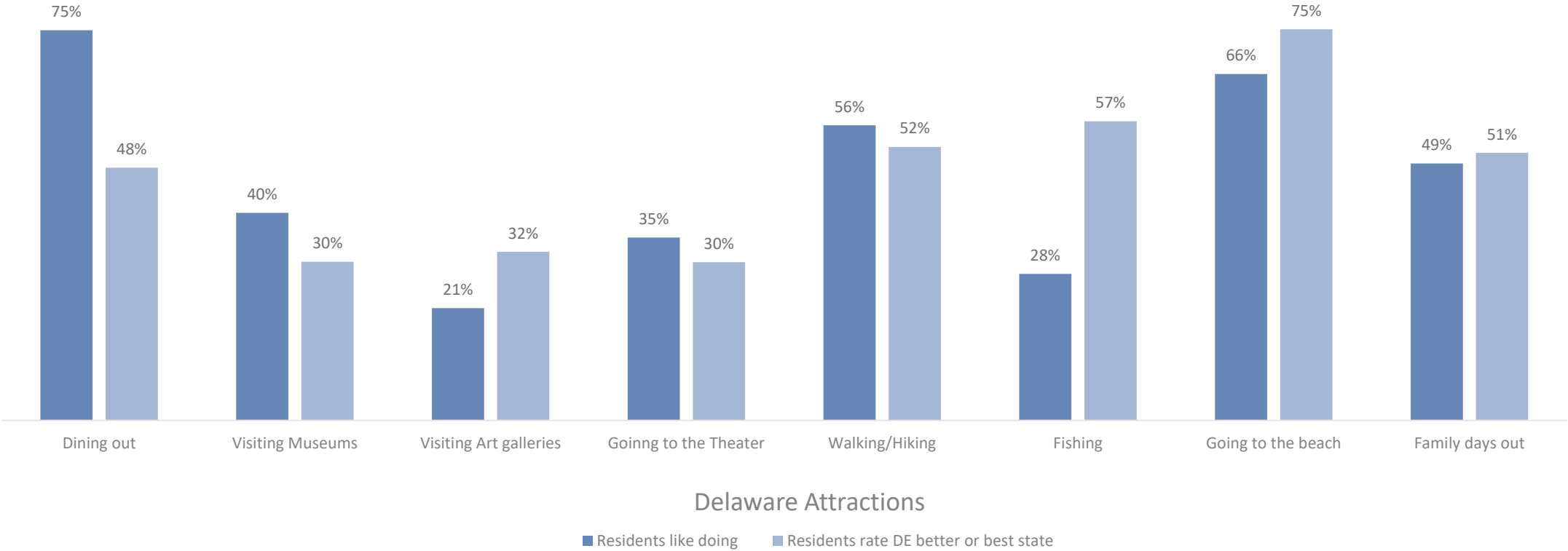
Entrepreneurs inspired by a variety of reasons

What is it that excites you about working for yourself?



WHAT DELAWAREANS LIKE TO DO

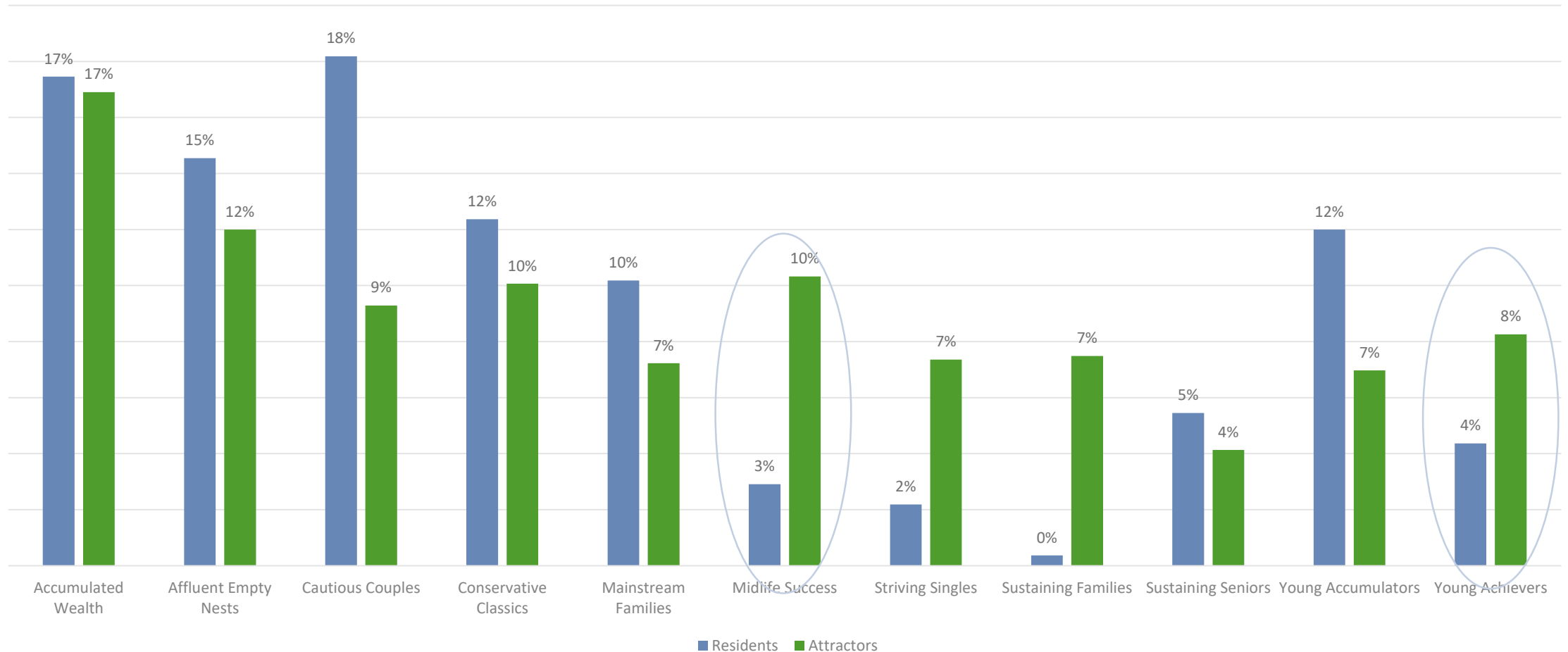
Local restaurants and museums may not live up to expectations



A CLOSER LOOK AT WHO IS ATTRACTED TO DELAWARE

Potential for growth in Midlife, Singles, Families and Young Achiever segments

Prizm Lifestage Segments



A CLOSER LOOK AT TWO POTENTIAL SEGMENTS

Prizm profiles - Midlife Success & Young Achievers

Midlife Success



Childless singles and couples in their thirties and forties.

College-educated residents who make six figure incomes at executive and professional—extends to more middle-class segments.

Found in urban and suburban communities.

Consumers of the latest technology, financial products, aerobic exercise, and travel.

Young Achievers



Lower midscale segments

Found in urban and metro neighborhoods.

A blend of family types, Young Achievers are also a mix of homeowners and renters.

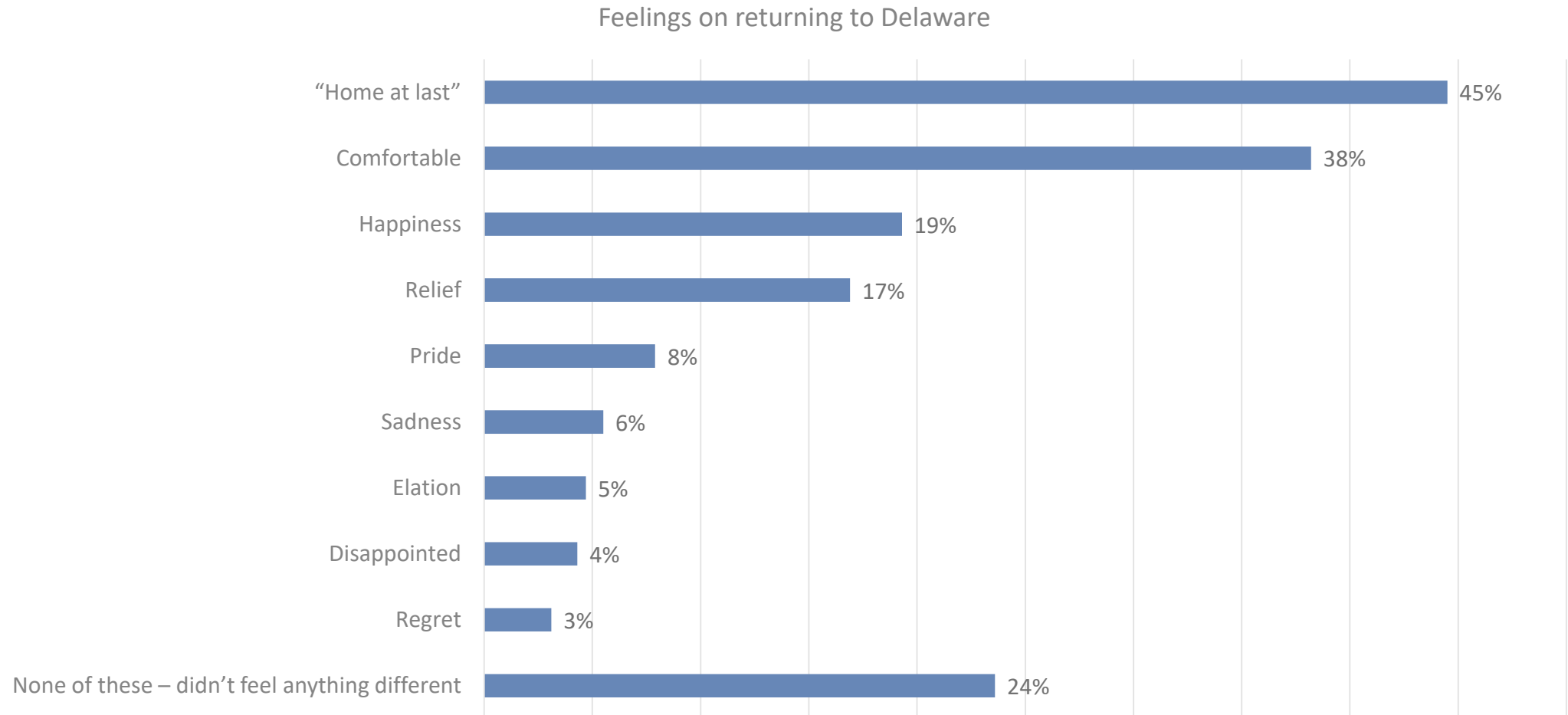
They are above average in their use of technology, often researching their upcoming purchases online.



DELAWARE — FEELS LIKE HOME

Returning to *the First State* feels safe and comforting...
and the beaches are great, too!

WHAT PEOPLE FEEL ON RETURNING HOME TO DELAWARE



DE residents who have left state past year. n=254

WHAT'S UNIQUELY DELAWARE



SO WHAT DOES THIS MEAN

Expand outreach beyond mid-Atlantic states

Quality of life is appealing to potential residents

Entrepreneurship as a possible attractor

More to offer than just lower taxes

Opportunity with families, singles and young achievers

An aerial photograph of a city skyline at dusk. The sky is a deep blue, and the city lights are beginning to glow. In the foreground, a river flows from the bottom left towards the right, with a bridge crossing it. The city is densely packed with buildings of various heights and styles, interspersed with green trees. A prominent church with a tall steeple is visible on the right side. The overall scene is a mix of urban development and natural elements.

Q&A



For more information, please
contact pattie.pan@dynata.com