



DELAWARE  
ARTS  
ALLIANCE

# CREATE Plan

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A Growth and Recovery Plan for the  
Creative Economy and Cultural  
Tourism Sector in Delaware

# FOREWORD

## DELAWARE

After extensive research and collaboration, the Delaware Arts Alliance proudly introduces the Creative Economy Advancement and Tourism Expansion (CREATE) Plan, a growth and recovery plan for the creative economy and cultural tourism sector in Delaware.

**This groundbreaking initiative, developed with the input of hundreds of Delawareans from diverse backgrounds, provides a shared vision, advocacy tools, and policy agenda for advancing our state's creative sector across all levels of government. We are excited for Delaware to be the first state in the nation to release a research-based plan for the creative economy that is aligned at the state, county, and city levels.**

Drawing from 326 survey responses and 25 focus group sessions with a cross-section of nonprofit and industry leaders, artists, and entrepreneurs, the CREATE Plan illuminates the challenges facing our creative community, including lost income, declining audience engagement, and unrealized potential. However, the CREATE Plan goes beyond simply identifying these issues. It showcases the state's diverse arts and cultural offerings through an online map and economic data, and provides a clear and

actionable roadmap for strengthening the state's arts and tourism sectors. This plan outlines policy changes and investments that will support the creative economy's post-pandemic recovery and continued prosperity.

As Delaware emerges from the challenges posed by COVID-19, the CREATE Plan calls for concerted efforts from all sectors to ensure the sustained growth of the creative economy. It's an invitation for elected officials, business and community leaders, philanthropists, artists, and the public to utilize the data, insights, a mapping tool, and recommendations provided to guide our creative economy's path forward.

The DAA and our partners are eager to unite stakeholders around this shared vision. We invite you to join us in shaping a future where the arts and tourism sectors in Delaware not only survive, but thrive beyond our wildest dreams.

We extend our deepest gratitude to our partners, whose participation and support were essential to the completion of this project:

- Governor Carney and the Delaware Division of Small Business for the Economic Development Administration's (EDA) American Rescue Plan Travel, Tourism & Outdoor Recreation subaward that supported this work.
- Delaware Arts Alliance board of directors, member organizations, and hundreds of participating stakeholders for their input and guidance.
- Our project working group, which includes government partners such as Delaware Division of the Arts, Delaware Department of Education, Department of State, arts organizations, individual creatives, and ten Community Engagement Captains from across the state.

**Neil Kirschling,  
Executive Director,  
Delaware Arts Alliance**

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Back Cover Image © Moonloop Photography





Image © Moonloop Photography

# 1. ABOUT THE PROJECT

In January 2023, Sound Diplomacy was commissioned by the Delaware Arts Alliance (DAA) to author the Creative Economy Advancement and Tourism Expansion (CREATE) Plan.

**This project is intended to build upon the DAA's work, and strengthen and support Delaware's for- and nonprofit creative industries and cultural agents. In studying the full creative economy at state, county and city levels, this is the first of its kind in the nation.**

The creative economy is composed of a range of sectors that generate their value primarily through "creativity", such as books & press, performing arts and audiovisual & interactive media, amongst others. It also encompasses the regional suppliers, manufacturers, distributors and retailers that compose the value chains of these sectors. The term has become increasingly popular since its inception in the mid-1990s, and is used internationally by a range of governments, agencies, and organizations.

In 2020, the cultural and creative sectors accounted for 3.1% of the global Gross Domestic Product and 6.2% of the global employment.<sup>1</sup> In 2021, arts and culture added \$1,016.2 billion to the US economy alone, a 13.7% increase from 2020, and employed 4.9 million people nationwide.<sup>2</sup>

As well as being an economic driver, the creative economy:

- Is at the forefront of innovation and research & development.
- Drives tourism, especially through events and cultural heritage.
- Is a key element of placemaking and branding efforts.

**Delaware's creative economy accounts for 2.35% of employment, surpassing that of the more traditionally supported industries, such as agriculture.** This consists of mainly small and midsize enterprises which have proven to be resilient even in the face of the challenges caused by COVID-19. Delaware stands out for its audiovisual sector, which boasts a higher concentration of businesses compared to the national average; this is also the case for cultural education and retailers that stock cultural products. Yet support is still required to strengthen the existing workforce, attract more creative economy businesses to operate in Delaware, export what services and products the creative economy is already producing, and put Delaware at the forefront of the national conversation when it comes to statewide creative economy planning.

With 69% of surveyed local audiences expressing an appetite for more cultural events in the state, there is an opportunity to leverage the public's interest, expand Delaware's already impactful creative economy, and increase visitor attraction.

The implementation of this project's recommendations will respond to the following goals and aspirational outcomes as determined by key stakeholders at project inception:

- Make Delaware the gold-standard when it comes to holistic creative economy development in the US.
- Increase the value associated with the cultural sector so that it stands shoulder-to-shoulder with other revenue-generating sectors.
- Boost the role that education plays in growing the state's creative economy sectors.
- Bring stakeholders together from across the state.

The creative economy and its institutions require assistance from multiple agencies including business development, tourism, and education, in order to reach its potential and continue to support other industries. **The existing creative economy is already tied to a diverse range of industries, and impacts over 4,000 jobs in sectors and industries outside of itself.**

In recognizing the need for the creation of this report, Delaware has become a leader amongst US states when it comes to putting the creative and cultural industries at the forefront of the economic development conversation.



# METHODOLOGY

The research methodology was composed of five interrelated steps that led to the final recommendations:

**REGULATORY ASSESSMENT**

A full analysis of the regulatory framework and programs that exist in Delaware, relevant to the creative economy. Includes a literature review of relevant strategic documents.

- Many of Delaware’s regulations pertaining to the creative economy need refreshing, particularly those relating to live events and liquor licensing.
- Secondary arts education in the state is lacking the regulations applied to primary education.
- The creative economy is in need of business support and development programs.

**ECONOMIC IMPACT**

A measure of the direct, indirect, and induced economic impact of the creative economy in Delaware. Sound Diplomacy also studied the Gross Value Added (GVA) of the sectors in Delaware’s creative economy.<sup>3</sup>

- Delaware’s creative economy supports 18,551 local jobs (4.1% of the state’s employment), a total output of \$3.7 billion and a total GVA of \$2.2 billion.
- The audiovisual & interactive media sector is the largest creative economy employer in the state, followed by cultural education and books & press.
- The average income for workers in the creative economy is 29% above the average for the rest of the economy, but there is a notable gender pay gap, with men earning 39.9% more than women on average.

**MAPPING**

An index of 2,534 creative economy assets in Delaware<sup>4</sup> was produced, using a database built from secondary sources and georeferenced with Sound Diplomacy’s mapping tool.

- Of the 2,534 assets identified, the design & creative services, visual arts & crafts, and audiovisual & interactive media sectors dominate. The majority of assets are located in New Castle County.
- The majority of tourism assets are located in Sussex County, where there is a strong geospatial correlation between the performing arts and natural & cultural heritage sectors.

**STAKEHOLDER ENGAGEMENT**

An online survey, distributed to local stakeholders (336 responses<sup>5</sup> were included in the final analysis), and stakeholder roundtables, held from August–September 2023, in which 227 stakeholders from all three counties were engaged.

- The survey found that collaborations within Delaware’s creative economy are decidedly local, and that a DIY approach drives activities such as booking live performances and producing/distributing creative work.
- 83% of creative individuals and 78% of creative organizations express dissatisfaction with income stemming from their creative work.
- Local audiences in Delaware are highly engaged with the local creative scene. 69% want to see more cultural events.

**SWOT**

All data was collated and analyzed through the SWOT (strengths, weaknesses, opportunities, threats) technique. This process allows us to compare and contrast findings and think strategically.



**CREATE Plan**

These five steps led to the creation of 25 actionable recommendations, based on the final analysis of findings from the research process.

**GUIDING PRINCIPLES**

*Regionality was a vitally important transversal theme that was embedded throughout the methodology and considered for each recommendation.*

*Sound Diplomacy has related the recommendations to various Sustainable Development Goals as developed by the United Nations.*

*Diversity, equality, access and inclusion (DEA&I) and environmental sustainability within the creative economy are imperative. For this reason, Sound Diplomacy placed related imperatives throughout the recommendations and also presented considerations to be applied to all programs and initiatives. Please refer to the full final report.*



## 2. REGULATORY ASSESSMENT



Image © Clear Space Theatre Company/Denry Howeth

Coordinating with our partners in Delaware, Sound Diplomacy conducted thorough research into the regulations, laws and programs that are related to the creative economy and cultural tourism.

### CROSS-SECTOR FINDINGS:

- Delaware requires improvements when it comes to topics related to cross-sector regulations and programs.
- While there is good governance and knowledge when it comes to the nonprofit and traditional arts sector and scenes, there is little formal organization related to the full scope of the creative economy.
- Creativity and the arts are prioritized in primary education, but secondary education students are underserved.
- There is room for growth related to post-secondary education's provisions of creative economy-adjacent courses, and their connection to Delaware's existing creative economy.
- While DEA&I is an important topic for stakeholders, there is no unified vision or guidelines in its relation to the creative sectors.
- Delaware's creative economy is severely lacking business development programs, business support and export initiatives that understand its specific challenges and traits, and that work strategically to support and grow the sector.

### SECTOR-SPECIFIC FINDINGS:

- Regulations related to performance and celebration, encompassing performing arts venues and special events, require attention, especially when it comes to permits and liquor licensing guidelines and processes.
- Cultural & natural heritage is particularly well developed; Delaware has much to offer the growth of potential in this area.
- While visual arts & crafts are particularly prominent in the state, there is little governmental or sustained institutional support for professionals in this sector.
- Delaware has made efforts to tackle illiteracy, but generally hasn't done much to support its books & press sector, although there are efforts to reinvigorate local journalism.
- Information on the audiovisual sector, inclusive of film, is disorganized, activity is uncertain, and the regulatory framework for this sector is out of date.
- Generally speaking, both the music recording & publishing and design & creative services sectors are not recognized or well-served by programs or regulations in the state.

### REGIONAL FINDINGS:

- Sound Diplomacy also reviewed the policy frameworks in Wilmington, Middletown, Dover, Smyrna, Milford, and Georgetown. In many cases we identified that there is room for improvement in regards to licensing, permits and zoning (liquor, special events, sound, cultural districts), and alignment of economic development initiatives and growth opportunities for the creative economy.



### 3. ECONOMIC IMPACT SUMMARY



The economic impact analysis provides a reliable measure of the economic importance of the creative economy in Delaware on three dimensions: direct, indirect, and induced impact.

In 2021, Delaware's creative economy supported **18,551 local jobs** (4.1% of the state's employment), a total output of **\$3.7 billion** and a total GVA of **\$2.2 billion**.

The **output multiplier effect** in Delaware equals **1.603**. This means that for every \$1,000 of output generated by the creative economy, an additional **\$603 of output** is created locally across other industries.





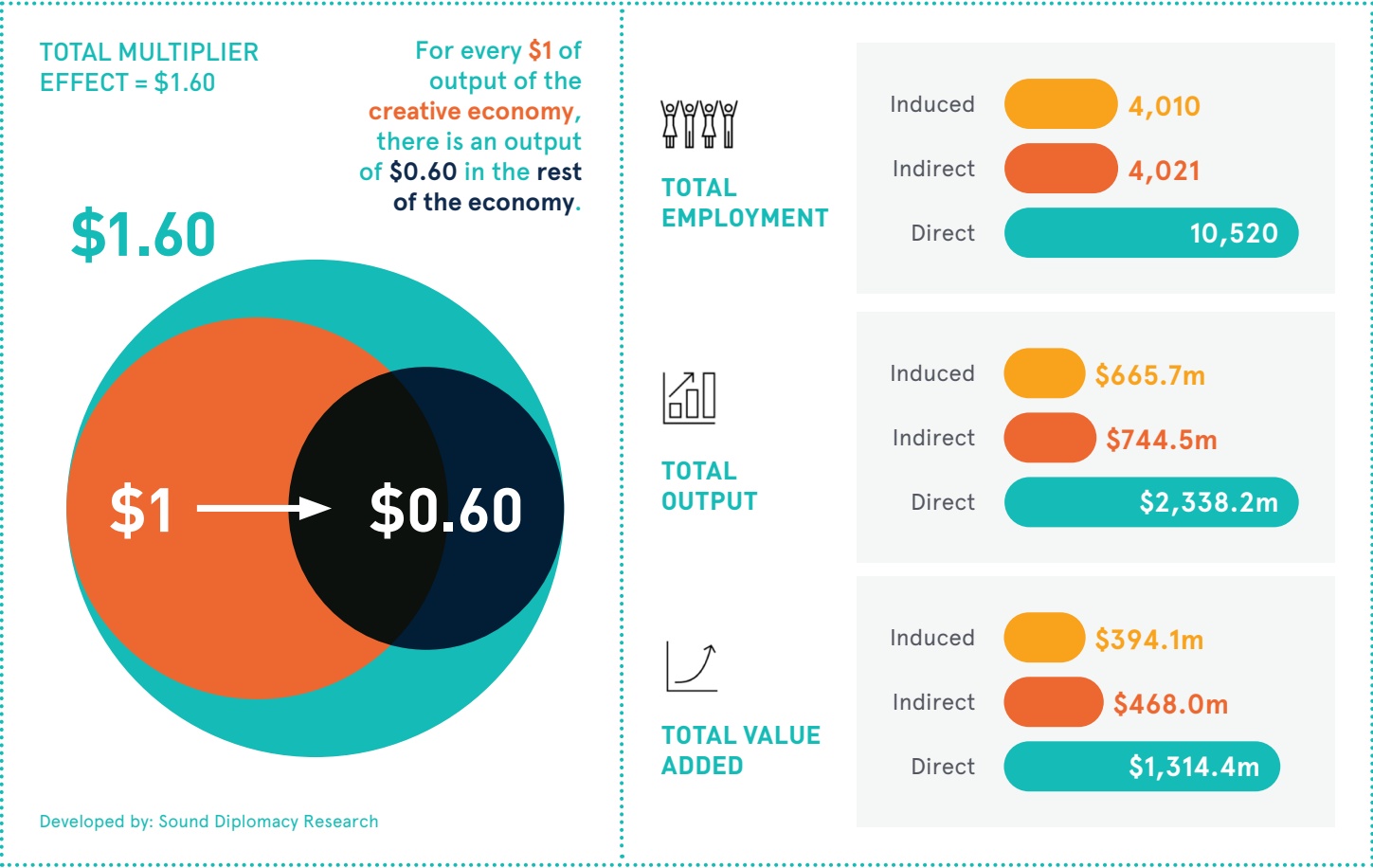
# DELAWARE CREATIVE ECONOMY

## TOTAL ECONOMIC IMPACT, 2021

	 TOTAL EMPLOYMENT	 TOTAL OUTPUT	 TOTAL VALUE ADDED
 Creative Economy	18,551	\$3.7b	\$2.2b
 Artistic Creation & Performance	394	\$36m	\$27m
 Audiovisual & Interactive Media	4,682	\$1,338m	\$725m
 Books & Press	3,066	\$775m	\$450m
 Cultural & Natural Heritage	1,369	\$230m	\$139m
 Cultural Education	2,390	\$322m	\$210m
 Design & Creative Services	1,930	\$330m	\$210m
 Festivals, Fairs & Conventions	55	\$4m	\$2m
 Music Recording & Publishing	70	\$21m	\$17m
 Performing Arts: Live Music, Theatre, Dance, Circus	547	\$46m	\$28m
 Visual Arts & Crafts	1,246	\$147m	\$88m
 Industry Support – Retail	1,541	\$221m	\$124m
 Other Professional & Business Support	1,261	\$279m	\$156m



Image © Matt Urban





## DIRECT IMPACT

**DEFINITION:** The direct impact reflects the economic value created by activities solely taking place within the creative economy, as measured by employment and output.

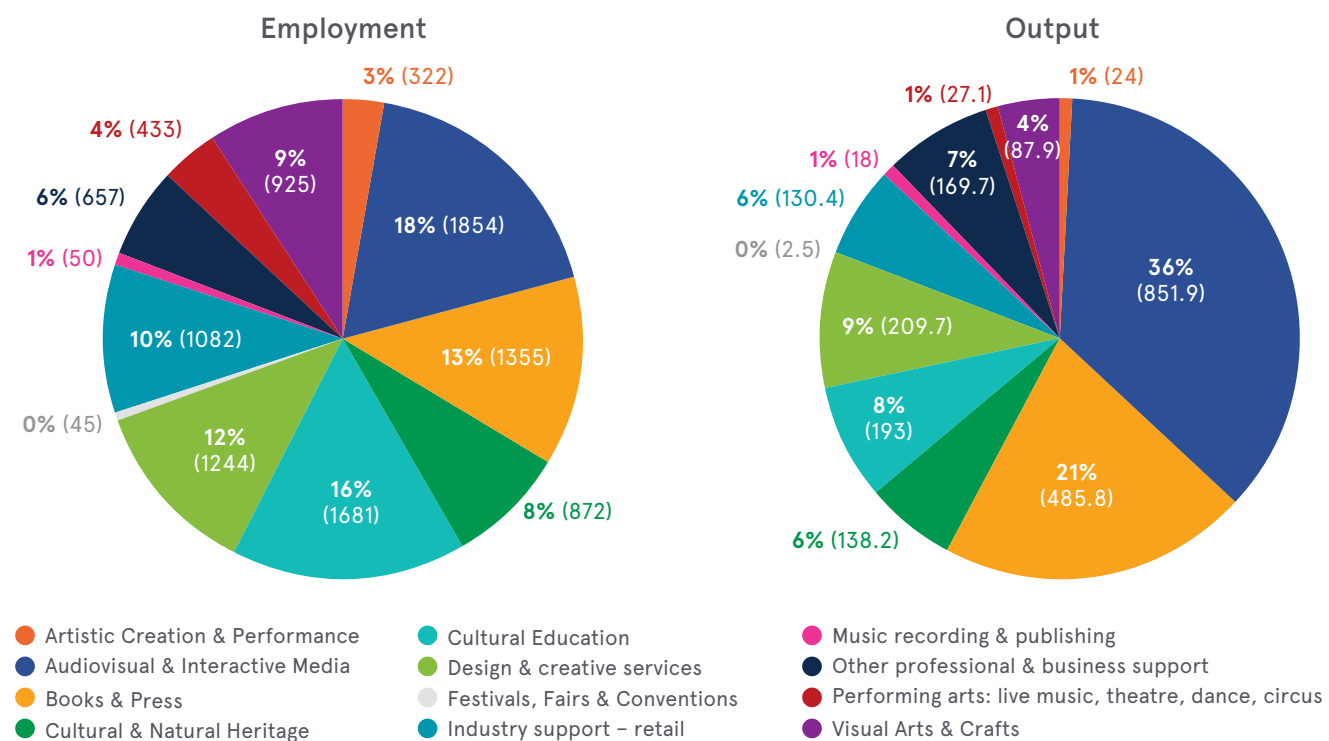
### KEY DATA:



Audiovisual & Interactive Media is the largest employer, generating **1,854 jobs** (18%), followed by Cultural Education with **1,681 jobs** (16%), and Books & Press with **1,355 jobs** (13%).

Regarding output, the three largest industries are **Audiovisual & Interactive Media** with **\$851.9 million** (36%), **Books & Press** with **\$485.8 million** (21%), and **Design & Creative Services** with **\$209.7 million** (9%).

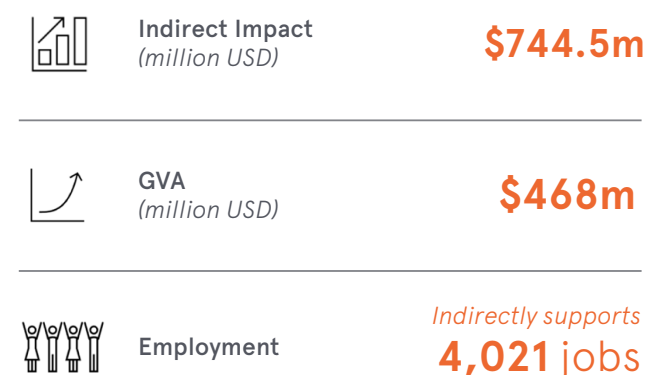
### EMPLOYMENT AND OUTPUT BY THE CREATIVE ECONOMY (OUTPUT IN \$ USD MILLION)



## INDIRECT IMPACT

**DEFINITION:** Indirect economic impact relates to the output and employment generated by the suppliers of the creative economy, including local businesses in Delaware that provide them with goods and services.

### KEY DATA:



**\$1,000**  
OF OUTPUT  
supports  
**\$318.41**  
OF OUTPUT  
in other sectors  
in Delaware

## INDUCED IMPACT

**DEFINITION:** The induced economic impact is the value resulting from spending carried out by workers whose wages are supported directly and indirectly by the creative economy. This includes money spent on services, food, entertainment, and transportation, amongst others.

### KEY DATA:



**\$1,000**  
OF OUTPUT  
creates an additional  
**\$284.71**  
OF OUTPUT  
locally across  
other sectors



# CREATIVE INDUSTRY SPECIALIZATION

**DEFINITION:** The industry specialization is measured by the Location Quotient, which is calculated by comparing the ratio of an industry's presence in the regional economy to the same proportion at the national level. An LQ of 1 signifies that the industry's presence in Delaware is proportionate to its presence in the national economy, an LQ below 1 indicates a lower concentration of the industry in the State, and an LQ above 1 reveals a local specialization in that industry. This comparison provides insights into the relative importance of that industry within the local context.

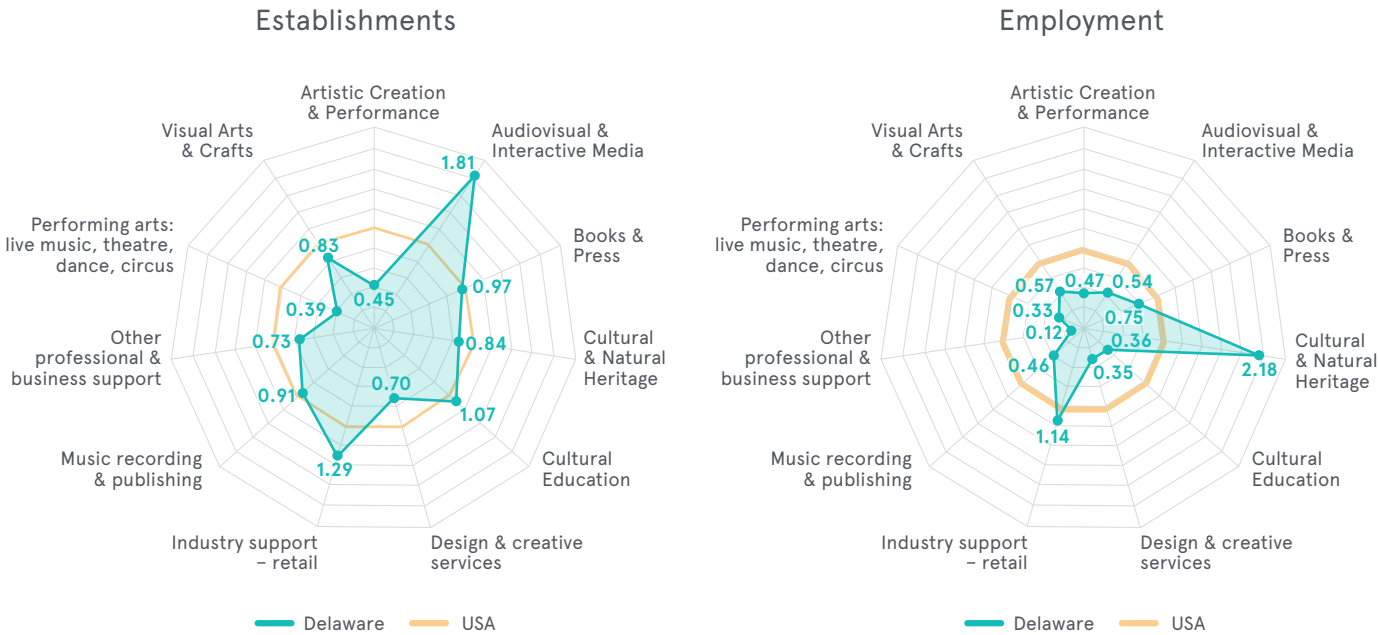
## KEY DATA:

With a higher number of businesses compared to the national average, **Delaware is more specialized in the audiovisual and interactive media sector** in comparison to the rest of the country.

**Cultural and natural heritage** in Delaware employs **significantly more people** than the national average.

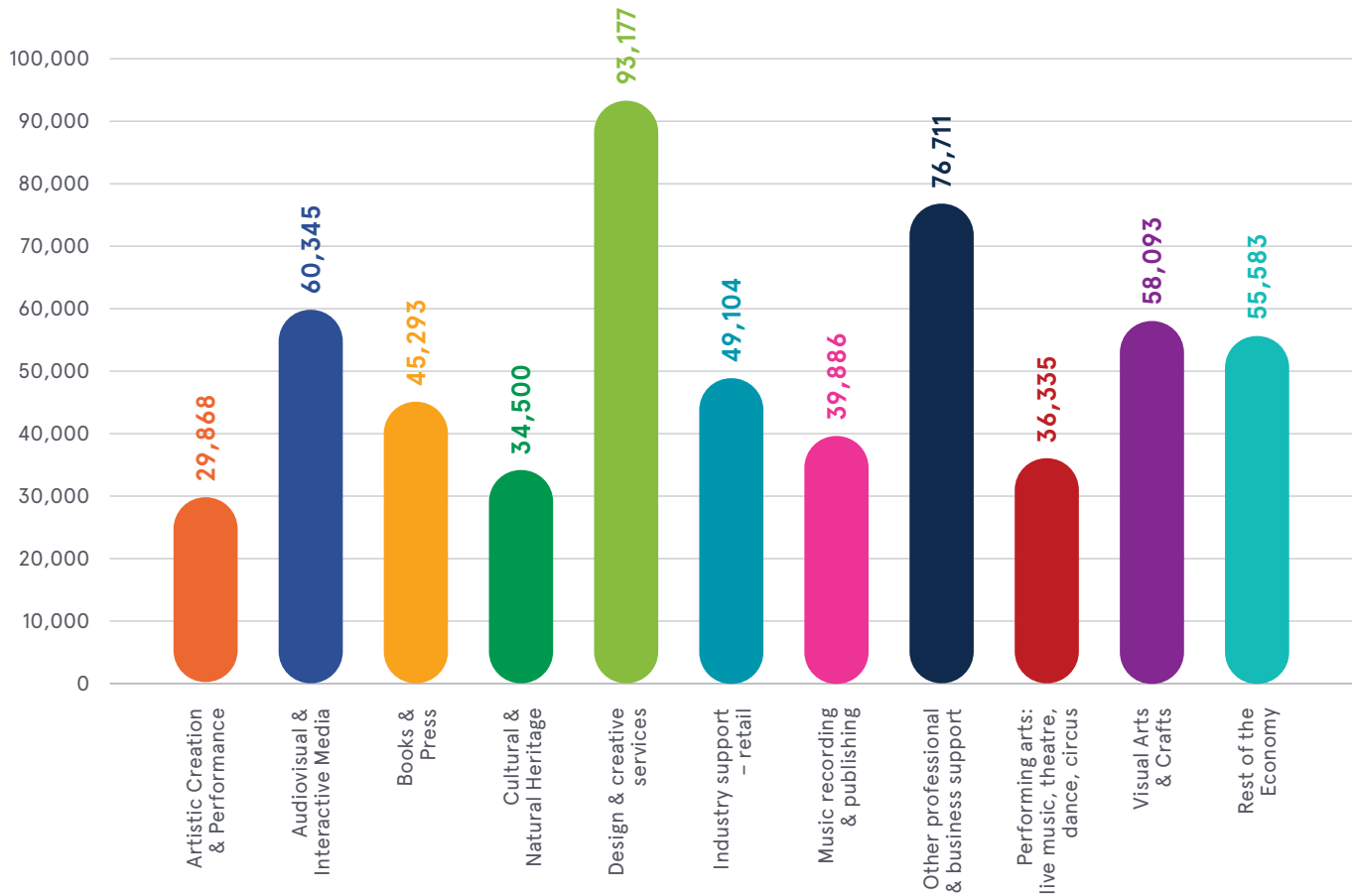
Delaware is **less abundant in venues** for the performing arts (live music, theater, dance).

## LOCATION QUOTIENTS DELAWARE



Source: Quarterly Census of Employment and Wages

## AVERAGE INCOME PER SECTOR (\$ USD)



Within the creative economy, we have identified **differences in average incomes** between different sectors, and also **gender pay gaps** across the creative economy.

The average income for workers in the creative economy is **29% above the average** for the rest of the economy, with the highest average income found in the **Design & Creative sector** and the lowest in Artistic Creation & Performance.

Men in the Creative Economy on average earn **39.9% more than women**, which is a more pronounced gender pay gap when compared with the rest of the economy's already significant gap.

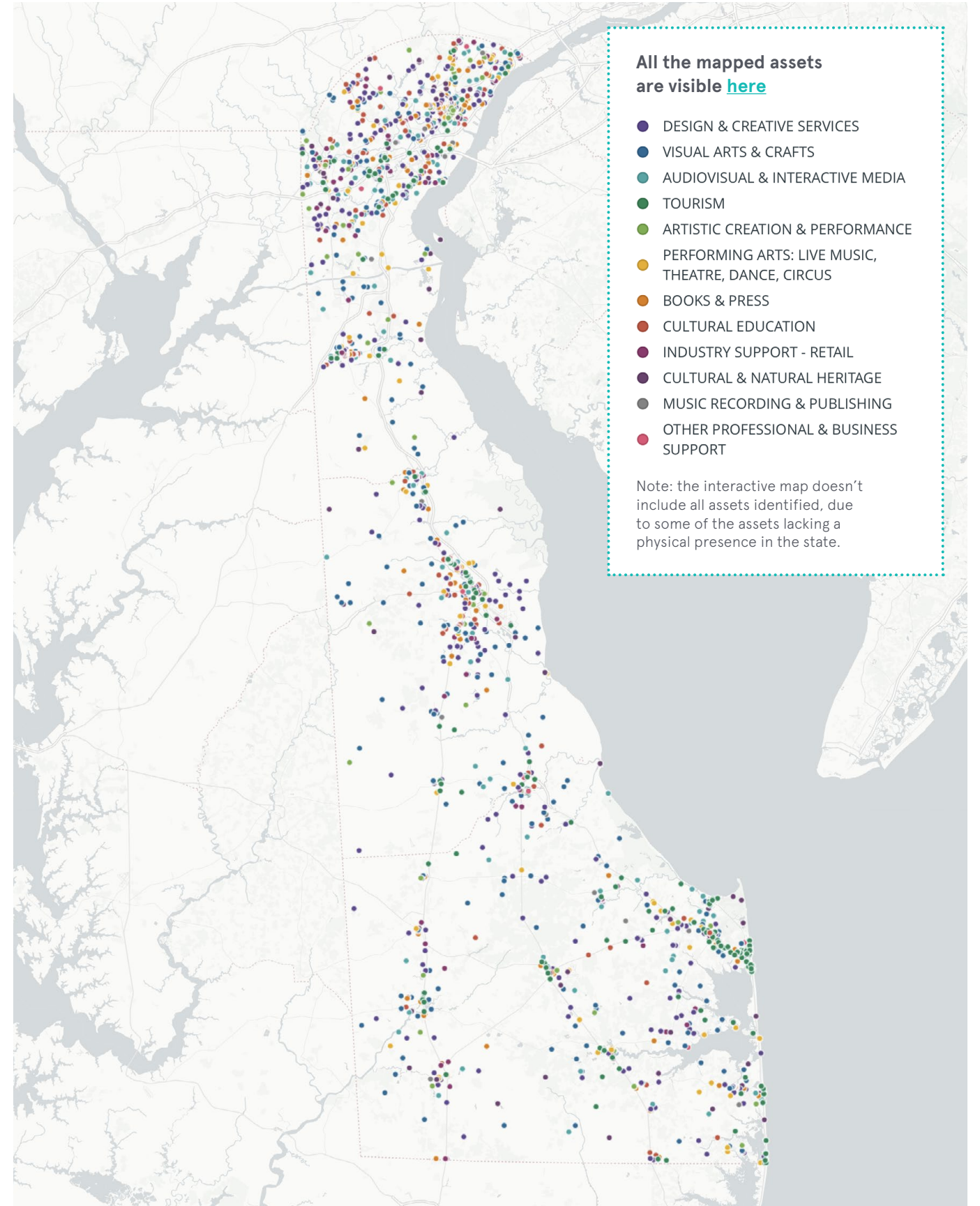




# 4. MAPPING SUMMARY



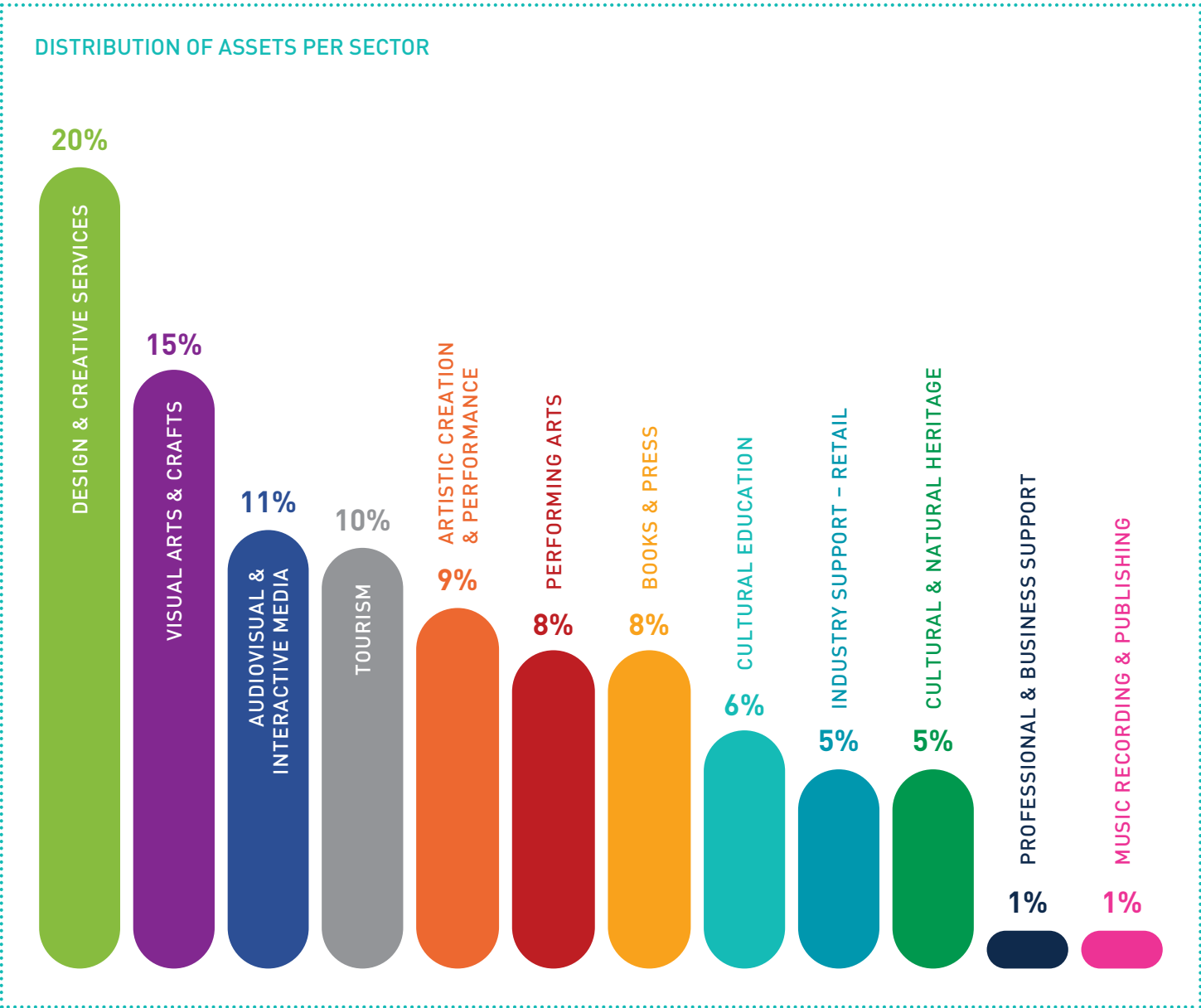
Image © Nathalie Antonov



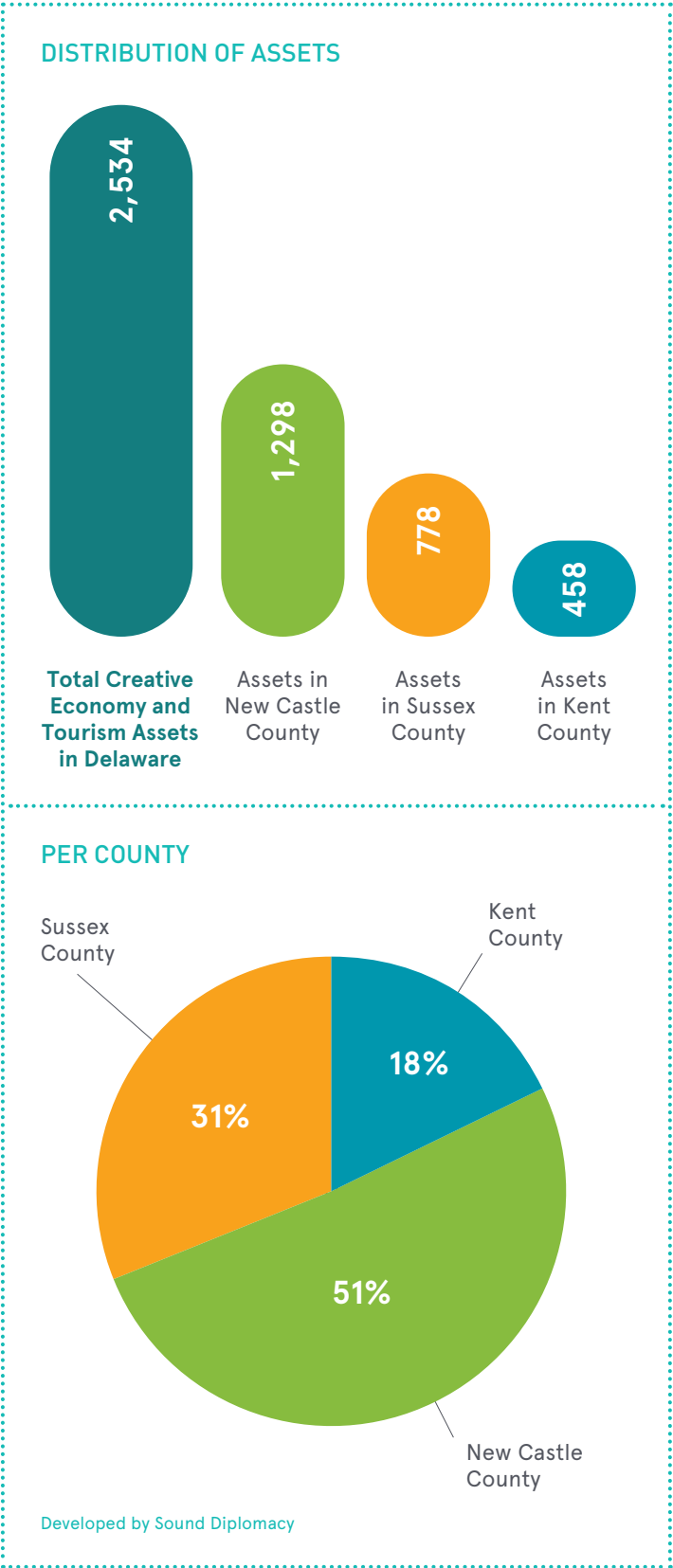


2,534 assets belonging to the creative economy and tourism (accommodation) have been identified. Design & creative services has the highest number with 509 (20% of the total assets), followed by visual arts & crafts with 371 (15%), audiovisual & interactive media with 272 (11%), and artistic creation & performance with 217 (9%). Tourism has 260 (10%).

OVERVIEW OF CREATIVE ECONOMY & TOURISM ASSETS

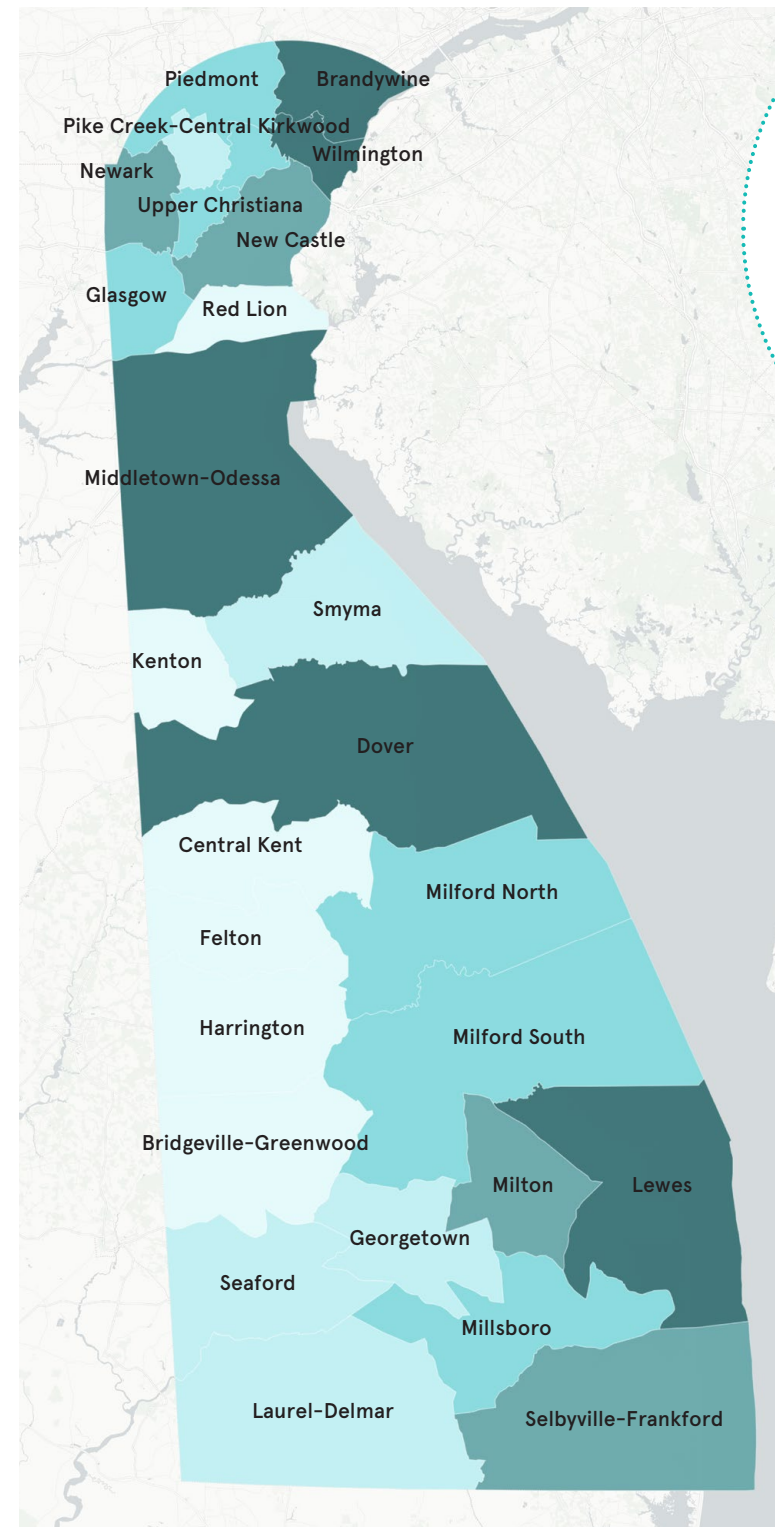


There are creative economy and tourism assets throughout Delaware, with the highest concentration in New Castle County – 1,298 (51% of Delaware's total). The top five cities with the highest number of creative and cultural assets are Wilmington (11% of Delaware's total), Lewes (11%), Dover (11%), Brandywine (6%), and Middletown-Odessa (6%).





HEATMAP OF ASSETS DISTRIBUTION  
BY COUNTY SUBDIVISION (CITY)



7 275  
Number of Assets

In regards to tourism, **53% of assets are concentrated in Sussex County**, followed by **New Castle County (30%)** and **Kent County (17%)**. The tourism-related assets, in relation with the cultural and creative assets, have a geospatial correlation. This implies that the logistics capacity to attract tourism is more developed in Sussex County than in other counties. Therefore, fostering cultural tourism in this region may be possible by connecting creative assets with tourism assets.



Specifically for the performing arts sector and natural and cultural heritage, which traditionally are known as creative and cultural sectors attracting tourism, there is a relatively similar geospatial distribution of assets, compared to the tourism sector. **This suggests that a logistics infrastructure is in place for accommodation that can be integrated with cultural elements, thus enabling the development of cultural tourism clusters.**

## 5. STAKEHOLDER ENGAGEMENT SUMMARY





Sound Diplomacy’s stakeholder survey targeted stakeholders within the local creative economy: producers/artists, related businesses and organizations, and consumers/fans. Throughout August and September 2023, Sound Diplomacy and Delaware Arts Alliance worked with ten Community Engagement Captains to engage 227 stakeholders via roundtables and obtain 336 survey responses. The main goal was to identify perceptions and experiences of Delaware’s creative economy. The findings show:

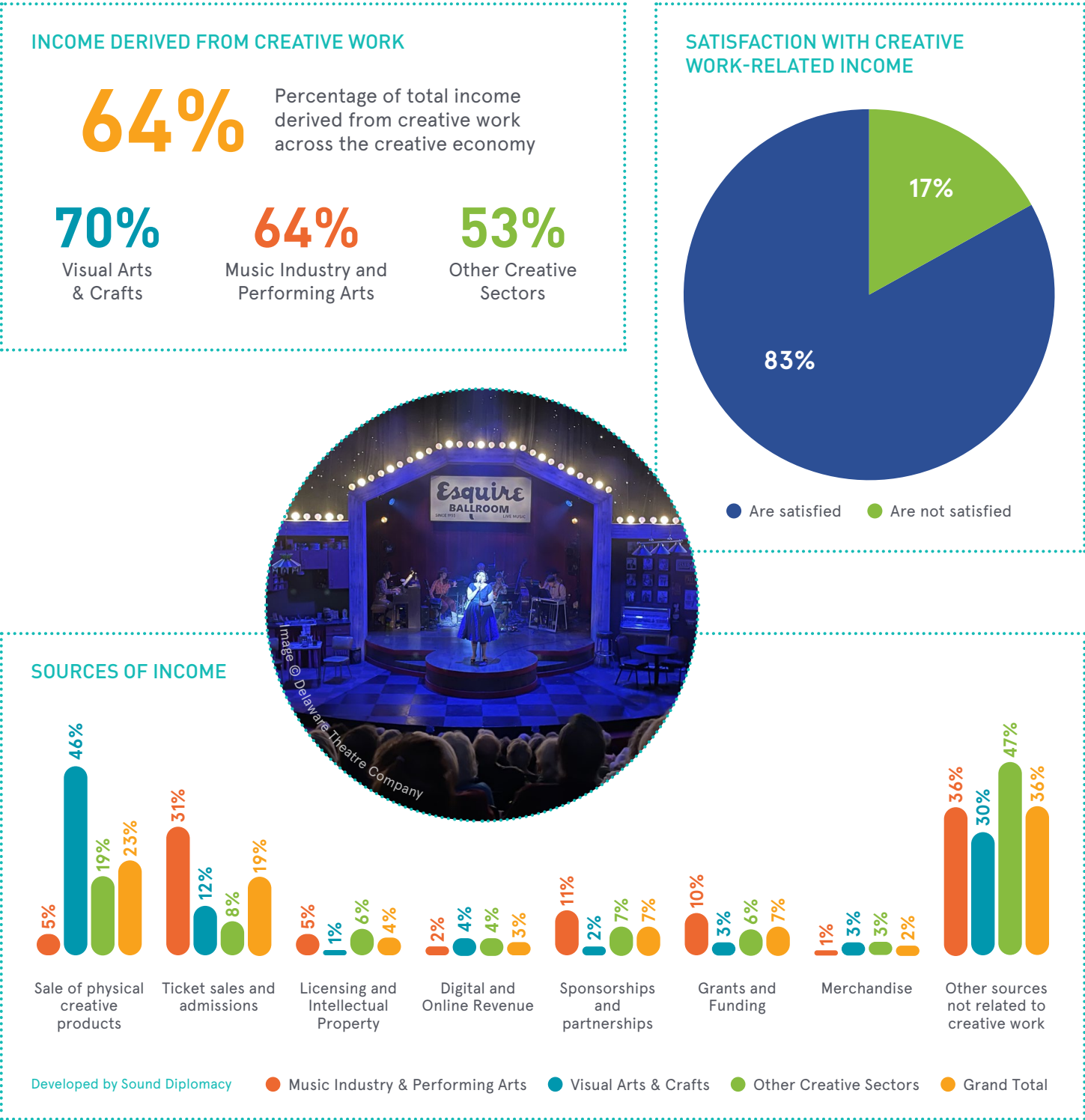
- There are robust interconnections across the creative economy, between creatives and organizations that primarily collaborate with suppliers (such as fellow creatives, those from other sectors, cultural education providers, festivals, and exhibition venues) from their own city or town.
- Creatives and organizations don’t rely on local stakeholders such as digital and physical distributors and producers, instead adopting a do-it-yourself (DIY) approach when booking live performances and producing and distributing creative work.
- A significant 83% of creatives and 78% of organizations express dissatisfaction with their income stemming from their creative work, including those who generate 100% of their income from their creative endeavors.



Image © 1440 Film Co/Mike Pfeifer

## CREATIVES: PROFESSIONALIZATION AND INCOME BY SECTOR

### CREATIVES AND ARTISTS

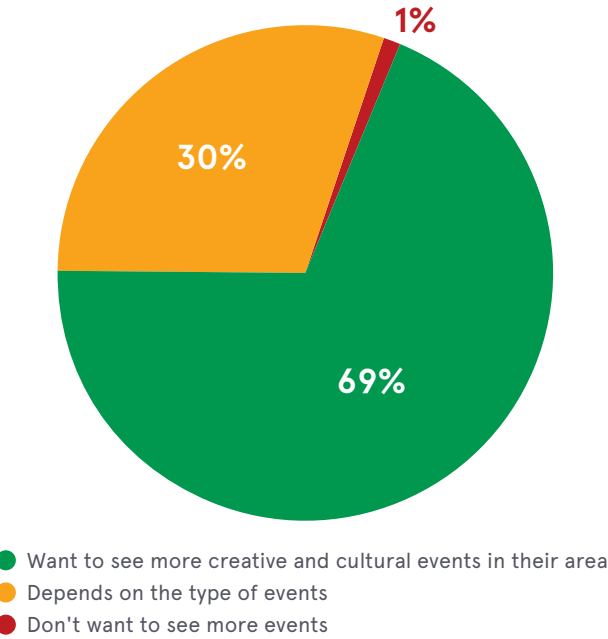




CULTURAL LOCAL AUDIENCES: MAIN FINDINGS

• The link between non-local audiences (tourists) and the creative sectors remains a challenge. According to the survey findings, the tourism sector in Delaware does not play a significant role in the income of both creatives and cultural sector organizations, and neither creatives nor cultural sector organizations consider Delaware a cultural tourism destination.

DO AUDIENCES WANT MORE CULTURAL EVENTS?



CREATIVE SECTORS QUALITY AND AVAILABILITY

CREATIVE AND CULTURAL SECTORS	QUALITY	AVAILABILITY
BOOKSTORES AND LIBRARIES	3.8	3
MUSEUMS, ARCHAEOLOGICAL SITES, CULTURAL LANDSCAPES	3.7	2.7
MUSIC VENUES	3.5	2.6
THEATERS	3.3	2.5
CINEMAS	3.3	2.8
ART GALLERIES	3.3	3.2
CULTURAL AND CREATIVE EDUCATION INSTITUTIONS	3.2	1.9
MUSIC FESTIVALS	3.1	2.2
ARCHIVES AND PRESERVATION INFRASTRUCTURE	3.1	2.5
THEATER AND DANCE FESTIVALS	2.8	2
MUSIC STORES	2.5	2.6
MEDIA FOCUSED ON THE CULTURAL AND CREATIVE INDUSTRIES	2.5	2.8

6. SWOT





The following pages provide a sector-specific and transversal theme SWOT analysis of all research and stakeholder engagement findings from this project. The findings are divided by strengths and weaknesses (SW) within Delaware's creative economy and opportunities and threats (OT) that are outside of the creative economy but nonetheless influence it.<sup>6</sup>



Image © The Music School of Delaware – Milford Branch

## STRENGTHS

### GOVERNANCE & ADVOCACY

In terms of governance & advocacy, Delaware benefits from organizations such as the Delaware Arts Alliance, the Delaware Division of the Arts, and the Delaware Heritage Commission. **These organizations advocate for the creative economy in Delaware.** The amount of people who have engaged with this research demonstrates the **depth and breadth of talent and excitement through the state.**

### ECONOMIC IMPACT

Despite a decline of 6.6% of the GVA due to COVID-19 in 2020, the Delaware creative economy rebounded with a notable 9.5% growth in 2021 (\$1,314.40 million), exceeding its pre-pandemic level.

### FUNDING AND FINANCING

There are a number of funding options for nonprofit activities and organizations for those working across the creative economy. The Delaware Division of the Arts has secured a **25%+ increase in grant funding** in the FY2024 State operating budget. There are many economic development agencies in the state.

### PROFESSIONALIZATION

Professionalization is currently supported by the state's various arts centers, the wealth of talent that exists within Delaware, and the **various advocacy groups** and their rolling efforts. Stakeholders report various interconnections across diverse creative sectors.

### MARKETING & AUDIENCE DEVELOPMENT

DelawareScene is a website that covers the whole state and allows anyone to submit events and activities for inclusion. Innovative non-digital marketing efforts, such as pop-up truck performances for Opera events and projects led by Delaware Libraries, have reached rural areas with some success and are **helping with audience development.** Local audiences express their interest in attending more cultural events in the state.

### PLACEMAKING

There are placemaking programs within the state.

### AUDIOVISUAL & INTERACTIVE MEDIA

Audiovisual & interactive media generates the highest direct output and employment out of all sectors in Delaware's creative ecosystem. There is **an existing and moderately established film and media industry in the state** including individuals with a wealth of professional expertise and connections. The mapping found a significant number of web hosting, video and audio streaming organizations in the state.

### PERFORMANCE & CELEBRATION

In regard to performance & celebration, **there are theaters across the state with year-round programs.** In addition, Delaware State Parks operates regular programs and events, including a summer concert series, and there are major music-related events.



Image © Tisa Della-Volpe

### VISUAL ARTS & CRAFTS

There are museums dedicated to the fine and plastic arts, **visual arts & crafts centers based throughout the state**, and various initiatives to support this sector led by the Delaware Division of the Arts.

### CULTURAL HERITAGE, THE HUMANITIES, AND INTERDISCIPLINARY COLLABORATION

**Delaware is well developed in terms of cultural and natural heritage** and has long standing networks and institutions in these sectors. This sector has a modest concentration of businesses but an above average employment rate. The Delaware Division of Historical and Cultural Affairs has an education curator who develops programs related to this sector for K-12 students.

### BOOKS & PRESS

**Books & press plays a large role in both employment** (third largest employer in the state's creative economy) **and availability rating** (second highest rated in the survey) in the state. While Delaware's many libraries account for this, there are also numerous small and independent publishers in the state, as well as printers. **Delaware's libraries** have recently been renovated, provide a wide range of services, and **are well integrated into the communities in which they are based.**

### DESIGN & CREATIVE SERVICES

Out of all the sectors, the design & creative services sector boasts the highest average income at \$93,177.

### MUSIC RECORDING & PUBLISHING

Despite its relatively small size, Sound Diplomacy's economic impact assessment shows that the music recording & publishing sector contributed nearly the same GVA to Delaware's economy as the performing arts did (1.1% vs. 1.2%).





Image © Delaware Theatre Company

# WEAKNESSES

## GOVERNANCE & ADVOCACY

There is **no institutionalized structure for strategically supporting the full scope of the creative economy**. Sectors are not integrated in any formal manner. Key stakeholders are not in regular dialogue and the cultural heritage sector is often missing from the conversation.

There is **not enough connection between actors within creative economy sectors and business leaders** in other economic sectors. Stakeholders reported feeling ignored by major businesses that are based in the state.

Statewide and regional **business development plans do not take the creative economy into account**.

## ECONOMIC IMPACT

There is **significant income disparity between different roles and individuals**. Practicing artists, for example, generally subsist on far below the average income.

**A significant percentage of creatives and organizations express dissatisfaction with their income stemming from their creative work**. This sentiment includes those who generate all of their income from their creative endeavors.

The creative economy has a higher percentage of small businesses, which are often more vulnerable to economic shocks and changes in market conditions.

In general, **Delaware exports consumers but does not import them**.

## FUNDING AND FINANCING

There is **little to no funding or financial support available explicitly for for-profit organizations within the creative economy**.

Funding options from philanthropic private individuals and organizations for nonprofit projects and organizations are based on a patronage model, leading to a cycle of funding feast or famine.

Funding is not seen by stakeholders to be equitably distributed throughout the community.

Governments and citizens typically possess **an outdated view of the creative economy** and therefore do not fully appreciate the benefits of government investment into the creative economy or arts.

## PROFESSIONALIZATION

There is no centralized Cultural Hub or Incubator in the state.

There is **not enough awareness of industry standards in a wide variety of sectors**, which is exacerbated by an overall lack of creative business services in the state.

**Business development programs do not typically include the creative industries**.

Cultural intermediary stakeholders, such as digital and physical distributors and producers, received the lowest ratings in terms of reliance from both creatives and organizations.

There are **no formal mentoring or guidance programs available for young creatives**, and internships are organized on an ad hoc basis.

**Only 25% of creatives protect and monetize their artistic work through copyright registration** with the United States Copyright Office (USCO) or by collaborating with performing rights organizations.

## MARKETING & AUDIENCE DEVELOPMENT

There is a perception that there is a lack of support when it comes to promoting events and activities statewide.

**Delaware is considered a “pass-through” state**, and residents and neighbors consider it a stepping stone to cultural activities elsewhere, rather than a meaningful home for them.

Stakeholders suggested that **potential audiences do not know where to go for information regarding activities**, and that regionalisation means that people are disconnected from information regarding activities elsewhere.

## AUDIOVISUAL & INTERACTIVE MEDIA

**Delaware is lacking an industry standard regulatory framework for attracting film & TV productions**. The ratio between establishments to employment in Delaware's audiovisual sector is significantly below the national average.

The Delaware Motion Picture and Television Development Commission's activity is uncertain.

## PERFORMANCE & CELEBRATION

**Permits and licensing processes for special events are not streamlined and are poorly explained**. There are often no clear guidelines about what sort of events will be permitted and which will not.

The informality of the permitting process leads to unequal treatment, a lack of transparency regarding decisions, and stifles the growth of this sector in the state.

The liquor licensing application process is complex and old fashioned.

A lack of structural support and financial capacity means that **there are few professional and full-time organizers, technicians and promoters in the performance sector**.

There are regional inequalities when it comes to accessing performances.

## VISUAL ARTS & CRAFTS

While there are many working artists in Delaware, there is a particular need for increased opportunities to network and share information.



## CULTURAL HERITAGE, THE HUMANITIES, AND INTERDISCIPLINARY COLLABORATION

Cultural heritage organizations do not regularly collaborate with other sectors in the wider creative economy.

## BOOKS & PRESS

Delaware's Local Journalism Initiative argues that local journalism is in crisis in the state.

## MUSIC RECORDING & PUBLISHING

The music recording & publishing sector is generally underdeveloped.

**Creatives in Delaware lack spaces for rehearsal or workshops**.



# OPPORTUNITIES

## EDUCATION

In terms of arts education, primary schooling follows the national CORE ARTS Standards, there is support for accessible arts education for Pre-K–12 youth, and the Delaware Institute for the Arts in Education delivers arts-integrated, multicultural experiences to students of all ages.

**60.3% of individuals working in the Creative Economy have a high level of education**, indicating a well-educated workforce that exceeds the average level higher education population in the rest of the economy (42.7%).

The University of Delaware has various arts and culture related programs, including Associate in Arts, Music, Literature, Art History, Game Studies, and eSports programs. Delaware Technical Community College has an Associate of Arts in their Teaching Degree program.

Delaware State University offers various courses related to the cultural industries, is in the process of expanding its offerings, and has recently purchased a theater in Dover.

There is increased attention on Associate Degrees – at Delaware College of Art and Design (DCAD), for example.

There are numerous advocacy and nonprofits working on improving arts education in the state, and arts institutions run arts educational programs.

## FUNDING AND FINANCING

Tax incentives and funding structures common to other sectors, like tech, could be replicated for the creative economy.

**Additional funding streams, such as the lottery and franchise taxes, could be applied to the creative economy.**

## TOURISM

**There is synergy between tourism and the arts**, with tourism plans already taking cultural events and activities into consideration, even if they are not always prominent.

The mapping shows geospatial correlation between tourism, performing arts, and natural and cultural heritage.

There is a train service between Delaware and nearby cities such as Philadelphia.

## DIVERSITY, EQUITY, INCLUSION & ACCESS

There are **advocacy organizations on the ground in Delaware working to improve equity** in the creative economy for women, BIPOC, those with disabilities, and the LGBTQIA+ community.

## LOCATION & SIZE

**Delaware is located close to established hubs of activity**, such as Philadelphia. This offers the opportunity for audiences and creatives to move between various locales.

**Delaware’s relatively small size can be an advantage**, as creatives variously placed throughout the state can quickly and easily collaborate and support for the creative economy should benefit the entire state.



Image © Developing Artists Collaboration/Joe Garner

# THREATS

## EDUCATION

Stakeholders report that **arts education is not prioritized in schools**. While Standards describe the focus of arts education to include music, media arts, theater, and visual arts, in practice, theater and dance are particularly absent from curriculums.

Not all schools have full time arts educators in schools, and some schools don’t have the space to dedicate to arts education.

**There is a severe lack of arts education access for students (especially from lower income backgrounds) at the Secondary level.**

There is difficulty getting arts and culture adjacent topics and courses into the pathways program.

**University students are not closely tied with the local creative ecosystem.**

There are issues with geographic and social accessibility to arts education in the state, with rural and minority communities the most neglected.

## CULTURAL ECOSYSTEM CHALLENGES

**Downtown development projects have not generally included or centered the arts or creative economy.**

**Proximity to cities such as Philadelphia and New York provide Delaware with a challenge** in terms of being competitive when it comes to live music and performances and attracting film and TV productions.

**Ancillary creative services** like managers, booking agents, local promoters, producers, and equipment suppliers **are mainly located outside the state** (but within the U.S.).

The “Delaware way”, which stakeholders often described as a culture of resisting innovative thinking, can keep networks closed and opportunities missed.

## TOURISM

As perceived by creatives and cultural sector organizations, the tourism sector in Delaware does not play a significant role in their income, and neither creatives nor cultural sector organizations consider Delaware a cultural tourism destination. Nonetheless, the aforementioned geospatial coordination between tourism and culture assets in the state signals the possibility of meaningful growth and cooperation.

## DIVERSITY, EQUITY, ACCESS & INCLUSION

**Prominent voices in the state’s arts scene lack diversity**. Women and minority communities were often described in roundtables as being left out of conversations and underrepresented in projects, both as audiences and as management/organizers.

While there are initiatives in different places to deal with this issue, there remains a lack of projects that empower people who are not currently sufficiently represented in Delaware’s creative ecosystem.

**Economic disadvantages are a major issue exacerbated by problems with transport and access.**

When examining the creative economy’s workforce by race, Sound Diplomacy found that **white individuals are overrepresented** in relation to Black/African-American Delawareans in the creative economy.

**Men in the creative economy on average earn 39.9% more than women**, which is a more pronounced gender pay gap when compared with the rest of the economy.

## TRANSPORT

Public transport limitations are an issue restricting Delaware’s potential. In general, **it is said that encouraging people to travel to different parts of the state for events and programs is challenging**.

## PERMITS & REGULATIONS

Neighboring states have much more robust and clear guidelines for the Audiovisual sector than Delaware.



# 7. OBJECTIVES AND RECOMMENDATIONS



Image © The Dover Art League

The action plan recommendations outlined in the following pages will help nurture and grow Delaware's burgeoning creative economy.

Expanding upon the following recommendations, the full CREATE Plan report describes detailed implementation considerations, including those related to regionality and DEA&I. The full report also includes a collection of international case studies that provide best-case examples for each recommendation. The overarching aims of the CREATE Plan are:

- **Stimulate economic activity** by fostering development and growth in all creative sectors.
  - **Improve the strategic, intentional policy and funding infrastructure to support the entire creative economy**, foster collaboration between different sectors and strengthen various parts of the value chain.
  - **Put cultural tourism at the heart of Delaware's brand** and marketing efforts, and expand the existing cultural offering.
  - **Increase transparency and accountability** by introducing additional representative bodies for the full breadth of the creative economy and encouraging collaboration.
  - **Provide a more equitable public education** and increase access to arts education for young people.
  - **Raise awareness and share knowledge** amongst stakeholders in order to innovate and create a stronger and more sustainable ecosystem.
  - **Foster cross-sector collaboration and interdisciplinary dialogues** to create new opportunities for the creative sector.
  - **Expand opportunities for professional development** for stakeholders in Delaware's creative economy.
  - **Embed the values and imperatives of DEA&I** into Delaware's creative economy and strategic thinking around it.
  - **Make sure that sustainability practices are embedded** into creative economy growth and development.
  - **Tackle geographic inequality** by embedding creative economy growth efforts into every county.
  - **Build Delaware's identity** around its creative economy and arts scene.
- The feasibility of each recommendation has been determined by phases, as seen in the table over the following pages.

## SECTOR KEY:

- \* ALL
- P PERFORMANCE & CELEBRATION
- A AUDIOVISUAL & INTERACTIVE MEDIA
- V VISUAL ARTS & CRAFTS
- C CULTURAL & NATURAL HERITAGE
- M MUSIC RECORDING & PUBLISHING
- B BOOKS & PRESS
- D DESIGN & CREATIVE SERVICES

## RECOMMENDATION LENGTH KEY:

- SHORT TERM (1-24 MONTHS)
- MEDIUM TERM (24-48 MONTHS)
- LONG TERM (48+ MONTHS)



RECOMMENDATION	SHORT TERM	MEDIUM TERM	LONG TERM
CREATIVE ECONOMY DEVELOPMENT			
<b>RECOMMENDATION #1</b> <b>Establish a Creative Economy Task Force That Continues To Build Cross-Sectoral Collaboration and Engage Stakeholders</b> <ul style="list-style-type: none"> <li>• Build a Creative Economy Task Force composed of decision-making stakeholders from key organizations from across the entire creative economy.</li> <li>• Engage key stakeholders to support the implementation of the CREATE Plan recommendations, and to shape and inform long-term strategic thinking across the creative economy.</li> </ul>	*		
<b>RECOMMENDATION #2</b> <b>Establish Creative Hubs in Each County</b> <ul style="list-style-type: none"> <li>• Stakeholders should work together to establish creative hubs in New Castle, Kent, and Sussex counties.</li> <li>• Special attention should be paid to improving the accessibility of rehearsal spaces in the south of the state.</li> </ul>	*		
<b>RECOMMENDATION #3</b> <b>Update Special Event and Performance-Related Permits and Licenses at the State, County, and City Level</b> <ul style="list-style-type: none"> <li>• Implement a renewed policy framework related to the night time economy and the performance &amp; celebration sector.</li> <li>• Refresh regulations related to liquor licensing, sound ordinances, special event permitting, all-ages ordinances, busking guidelines, and agent of change regulations.</li> </ul>	P		
<b>RECOMMENDATION #4</b> <b>Develop a Statewide Digital “One-Stop Shop” for Permits and Licenses</b> <ul style="list-style-type: none"> <li>• In partnership with supporting stakeholders, build and implement a digital platform that centralizes all relevant information regarding the creative economy, including regulations, funding opportunities, calendars, databases, and professionalization programs.</li> </ul>	A P		

RECOMMENDATION	SHORT TERM	MEDIUM TERM	LONG TERM
INDUSTRY SUPPORT			
<b>RECOMMENDATION #5</b> <b>Include the Creative Economy in Statewide Business and Economic Development Communications and Programs</b> <ul style="list-style-type: none"> <li>• Promote the businesses and sub sectors that form the creative economy to chambers of commerce, export departments, small business development departments, and decision makers in economic innovation and strategic partnerships.</li> </ul>	*		
<b>RECOMMENDATION #6</b> <b>Create a Full-time Government Position to Represent the Interests of the Creative Economy’s Self-Employed and Small Businesses</b> <ul style="list-style-type: none"> <li>• Establish a Commissioner that supports freelancers, self-employed, and sole proprietor businesses within the creative economy.</li> <li>• Represent their interests at the state level to bring structural support to these types of workers and develop a sustainable workforce.</li> </ul>	*		
<b>RECOMMENDATION #7</b> <b>Create Fair Pay Guidelines for Artists, Creatives and Professionals in the Creative Industries</b> <ul style="list-style-type: none"> <li>• Work with stakeholders to create and promote fair pay guidelines for different types of work in the creative economy, with a particular focus on work that is completed on a freelance basis.</li> </ul>	*		
<b>RECOMMENDATION #8</b> <b>Modernize Delaware’s Film &amp; Media-production Industry</b> <ul style="list-style-type: none"> <li>• Refresh media production-related legislation, permits, and policy, especially related to film permits and tax incentives.</li> <li>• Provide assistance to productions with hiring local crews, providing facilities and vendors for production support, developing a comprehensive “film-ready” database of shooting locations in the state, and providing extensive guidelines concerning sustainability and diversity considerations.</li> </ul>	A		



RECOMMENDATION	SHORT TERM	MEDIUM TERM	LONG TERM
TOURISM			
<b>RECOMMENDATION #9</b> <span>*</span> <b>Develop a Statewide Cultural Economy Brand to Benefit Tourism, Economic Development, Export, and Audience Development</b> <ul style="list-style-type: none"> <li>• Develop a distinctive image, identity, and reputation that is strategically crafted and communicated to emphasize the state’s cultural, artistic, and creative assets.</li> <li>• Give Delaware a unified voice when it comes to its creative economy, and help identify Delaware both nationally and internationally as a place that has a growing and strong arts and cultural scene.</li> </ul>			
<b>RECOMMENDATION #10</b> <span>P V C</span> <b>Increase Cultural Tourism Offerings</b> <ul style="list-style-type: none"> <li>• Increase tourism and contribute to economic and social development by providing unique and authentic cultural encounters (public art installations by local artists in key locations, arts fairs, open studio days, cultural pop-up shops, curated culture travel packages, etc.)</li> </ul>			
<b>RECOMMENDATION #11</b> <span>*</span> <b>Emphasize Arts &amp; Culture in Delaware’s Tourism Communications</b> <ul style="list-style-type: none"> <li>• Add cultural subsections to tourism sites, create an interactive cultural inventory, increase physical advertising materials in tourist areas/establishments, develop new partnerships, etc.</li> </ul>			

RECOMMENDATION	SHORT TERM	MEDIUM TERM	LONG TERM
FUNDING			
<b>RECOMMENDATION #12</b> <span>*</span> <b>Identify Additional Revenue Streams to Support Delaware’s Creative Economy</b> <ul style="list-style-type: none"> <li>• Identify new funding sources and investment opportunities for the for-profit arts and creative sectors.</li> </ul>			
<b>RECOMMENDATION #13</b> <span>*</span> <b>Expand Equitable Arts Funding</b> <ul style="list-style-type: none"> <li>• Support and expand the DDOA’s granting schemes with arts funding structures led by other governmental agencies along equitable lines.</li> <li>• Build on DDOA’s DEA&amp;I requirements with additional guidelines to funding bodies in collaboration that can be used by juries when assessing grant applications.</li> </ul>			



Image © Freeman Arts Pavillion/Joe Lamberti



RECOMMENDATION	SHORT TERM	MEDIUM TERM	LONG TERM
EDUCATION			
<b>RECOMMENDATION #14</b> <div> <b>Secure Arts Funding for Every Student in Public Education</b> <ul style="list-style-type: none"> <li>Earmark a yearly budget for arts education, covering primary and secondary schooling, weighted towards supporting schools in low income neighborhoods and helping schools cover administrative costs of implementing the budget.</li> <li>Schools would be able to use this additional funding to either support a full-time arts teacher, or use it to bring in freelancers or nonprofit arts education program providers to supplement the arts education they are already providing.</li> </ul> </div>	*		
<b>RECOMMENDATION #15</b> <div> <b>Make Arts Education Mandatory in Secondary Education</b> <ul style="list-style-type: none"> <li>Introduce participation in arts education as a requirement for graduation from secondary education in Delaware.</li> <li>This requirement will necessitate the introduction of secure arts education funding and will ensure that all students in public schools in Delaware have access to arts education throughout their school career.</li> </ul> </div>	*		
<b>RECOMMENDATION #16</b> <div> <b>Improve Career Development Opportunities for Secondary Education Students</b> <ul style="list-style-type: none"> <li>Create more opportunities for students in secondary and non-university higher education to see the creative economy as a place for career development.</li> <li>Introduce annual career days for 15–24 year olds, and the founding of an official mentorship program.</li> </ul> </div>	*		
<b>RECOMMENDATION #17</b> <div> <b>Advocate for More Pathway Courses and Associate Degrees Related to the Creative Economy</b> <ul style="list-style-type: none"> <li>Seek to expand the options available to young people and adults wanting to gain formal education in topics and skills related to creative economy sectors with pathway courses and associate degrees.</li> </ul> </div>	*		

RECOMMENDATION	SHORT TERM	MEDIUM TERM	LONG TERM
PROFESSIONAL DEVELOPMENT			
<b>RECOMMENDATION #18</b> <div> <b>Host Professional Development Workshops and Lectures</b> <ul style="list-style-type: none"> <li>Organize a regular series of professional development workshops and lectures featuring stakeholders located within and without the state.</li> <li>Workshops can be in-person, but streamed/recorded for greater access, or fully online. In all instances, accessibility considerations should be taken into account.</li> </ul> </div>	*		
<b>RECOMMENDATION #19</b> <div> <b>Improve Professionalization Related to Copyright and IP with the Support of Legal Professionals</b> <ul style="list-style-type: none"> <li>Provide expert-led copyright and IP education delivered via a special annual conference/event on the topic.</li> <li>Arrange direct support in the form of pro bono work and partnerships with law schools to increase the maturity of knowledge when it comes to industry standards and exploring innovative business opportunities.</li> </ul> </div>	M B		
<b>RECOMMENDATION #20</b> <div> <b>Formalize Creative Economy Internships</b> <ul style="list-style-type: none"> <li>Formalize the internship process in a manner similar to how job opportunities are currently listed on DelawareScene to make opportunities more equitable and accessible, and encourage students and recent graduates to pursue professional opportunities within the state.</li> </ul> </div>	*		



RECOMMENDATION	SHORT TERM	MEDIUM TERM	LONG TERM
INFRASTRUCTURE DEVELOPMENT			
<b>RECOMMENDATION #21</b> <b>Identify and Promote Spaces for the Creative Economy</b> <ul style="list-style-type: none"> <li>Repurpose unused or underused spaces for workshops, pop-up retail units and office space for individuals, organizations, and businesses in the creative economy.</li> <li>Short-term and pop-up retail units and workshops, as well as mixed use spaces featuring fairs and other types of events, can become part of Delaware’s cultural tourism offering and would benefit long term placemaking efforts.</li> </ul>	*		
<b>RECOMMENDATION #22</b> <b>Support Access to Increased Public Transportation in Delaware</b> <ul style="list-style-type: none"> <li>Ensure that ongoing and future plans from the State of Delaware, regional and city/town councils, and the Department of Transportation involve creative economy stakeholders in research into the current state and impact of public transport.</li> <li>Collect data on what residents would like to see from public and multimodal transport infrastructure.</li> <li>Put a strategic plan in place for improving public transport across the state.</li> </ul>	*		

RECOMMENDATION	SHORT TERM	MEDIUM TERM	LONG TERM
MARKETING AND AUDIENCE DEVELOPMENT			
<b>RECOMMENDATION #23</b> <b>Offer Transit Shelter and Outdoor Advertising Space to Nonprofits</b> <ul style="list-style-type: none"> <li>Offer nonprofit and cultural organizations free advertising opportunities in transit shelters, public buildings, and on street and highway advertising implemented as part of downtown development plans.</li> </ul>	V P		
<b>RECOMMENDATION #24</b> <b>Improve the Maturity of Creative Industries-specific Marketing Practices and Knowledge with Work-Study Placements and Grants</b> <ul style="list-style-type: none"> <li>Work to increase the professional pool of creative industry-minded marketing professionals by developing work-study placements for young marketing professionals.</li> <li>Pair placements with dedicated microgrants available specifically for hiring local communications experts and students for the marketing of creative projects.</li> </ul>	D		
<b>RECOMMENDATION #25</b> <b>Perform an Annual Marketing Campaign Promoting DelawareScene</b> <ul style="list-style-type: none"> <li>Perform an audience awareness campaign related to DelawareScene similar to that conducted in 2023, to ensure that the platform is populated and visited by residents and visitors alike.</li> <li>Promote DelawareScene through online advertising, social media and billboards. The platform will also be able to take advantage of any advertising opportunities made available to arts organizations in public and semi-public spaces.</li> <li>Engage a PR and marketing specialist to help strategize and perform any such campaign.</li> </ul>	*		



# 8. CONCLUSION

The research proves what stakeholders in Delaware have believed all along: that the First State boasts an abundance of talent; a passionate community; a long cultural history; and the foundational vision to develop a unique, successful, and resilient creative economy.

However, research has also revealed that, amongst other issues, there is limited access to an uneven distribution of arts education; for-profit cultural work is undersupported; regional, racial and gender-based inequities exist within the creative economy; and legislative frameworks are out of date and hinder performance sector growth.

While Delaware has a broad tourism offering and tourism offices are already considering arts & culture, the state does not have a solid brand when it

comes to promoting its creative economy. Furthermore, there is a lack of maturity when it comes to understanding and supporting the full scope of the creative economy, with key sectors siloed at both a discursive and governmental level.

With more strategic focus, utilizing the existing and strong talent that already exists within Delaware, the state can position itself as a national leader when it comes to statewide creative economy development. The path forward includes further developing the

assets and opportunities in both the north and south of the state, with special attention being paid to building an equitable creative economy that prioritizes access for BIPOC and women. Work to strengthen the creative economy will involve acknowledging its value as an economic, social, and cultural driver, with the goal for the state to be proud of having a creative economy that benefits and uplifts all Delawareans.



Image © Wilmington Children's Chorus



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ENDNOTES

1 UNESCO, *Re-Shaping Policies for Creativity: Addressing Culture as a Global Public Good*, 2022, <https://unesdoc.unesco.org/ark:/48223/pf0000380474>

2 National Endowment for the Arts, "The U.S. Arts and Cultural Production Satellite Account (1998-2021)," March 2023, <https://www.arts.gov/impact/research/arts-data-profile-series/adp-34>; National Endowment for the Arts, "New Data Show Economic Activity of the U.S. Arts & Cultural Sector in 2021," March 15, 2023, <https://www.arts.gov/news/press-releases/2023/new-data-show-economic-activity-us-arts-cultural-sector-2021>

3 GVA indicates the value of the sales of goods and services in the sector, subtracting their costs. A rough analogy can be drawn between GVA and the "profits" of a business or sector, although they are not exactly the same.

4 Accessible [HERE](#), or via this link: <https://shorturl.at/qlSTY>

5 The survey had an approximate duration of 15 minutes and was open for responses from July to October, 2023. A total of 844 responses were collected (317 complete, 485 partial, and 42 disqualified). Out of the 485 partial responses, 19 were included in the analysis.

6 Internal factors are anything related to specific creative economy industries and sectors, while external factors are those associated with transversal topics.

ABOUT SOUND DIPLOMACY



Sound Diplomacy is a global research and strategy consultancy committed to building and supporting sustainable ecosystems that bring economic development to people, places and cities. They provide research and recommendations to businesses and policymakers to help them make informed decisions on the best use of places and how to stimulate economic, social and cultural growth. Sound Diplomacy’s team of economists, analysts, researchers and consultants is based across the UK, Europe, North America and Latin America and has delivered results across six continents, in over 100 cities and 25 countries. For more information, please visit [www.sounddiplomacy.com](http://www.sounddiplomacy.com)





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