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DELAWARE

CREATIVE ECONOMY ADVANCEMENT AND TOURISM EXPANSION (CREATE) PLAN

Presented to: Delaware Arts Alliance

Final Report

February 2024

1. Introduction	4
1.1. Foreword	4
1.2. About the Project	5
1.3. About Delaware Arts Alliance	7
1.4. About Sound Diplomacy	8
1.5. Commitment to the Sustainable Development Goals	8
1.6. Scope and Methodology Summary	9
1.7. Definitions	11
2. Cultural and Creative Industries Overview	13
2.1. Creative Economy Regulatory Assessment	13
2.2. Creative Economy Asset Mapping Analysis	15
2.3. Creative Economy Economic Impact Assessment	20
2.4. Creative Economy Survey Analysis	25
2.5. SWOT Analysis	31
3. Action Plan	48
3.1. Advancement and Expansion Plan	48
3.1.1. Creative Economy Development	49
3.1.1.1. Recommendation 1: Establish a Creative Economy Task Force That Continues To Build Cross-Sectoral Collaboration and Engage Stakeholders	55
3.1.1.2. Recommendation 2: Establish Creative Hubs in Each County	64
3.1.1.3. Recommendation 3: Update Special Event and Performance-Related Permits and Licenses at the State, County, and City Level	68
3.1.1.4. Recommendation 4: Develop a Statewide Digital “One-Stop Shop” for Permits and Licenses	74
3.1.2. Industry Support	78
3.1.2.1. Recommendation 5: Include the Creative Economy in Statewide Business and Economic Development Communications and Programs	84
3.1.2.2. Recommendation 6: Create a Full-time Government Position to Represent the Interests of the Creative Economy’s Self-Employed and Small Businesses	89
3.1.2.3. Recommendation 7: Create Fair Pay Guidelines for Artists, Creatives and Professionals in the Creative Industries	93
3.1.2.4. Recommendation 8: Modernize Delaware’s Film & Media-production Industry	98
3.1.3. Tourism	105
3.1.3.1. Recommendation 9: Develop a Statewide Cultural Economy Brand to Benefit Tourism, Economic Development, Export, and Audience Development	107
3.1.3.2. Recommendation 10: Increase Cultural Tourism Offerings	111
3.1.3.3. Recommendation 11: Emphasize Arts & Culture in Delaware’s Tourism Communications	113
3.1.4. Funding	117
3.1.4.1. Recommendation 12: Identify Additional Revenue Streams to Support Delaware’s Creative Economy	120
3.1.4.2. Recommendation 13: Expand Equitable Arts Funding	124
3.1.5. Education	127

3.1.5.1. Recommendation 14: Secure Arts Funding for Every Student in Public Education	132
3.1.5.2. Recommendation 15: Make Arts Education Mandatory in Secondary Education	137
3.1.5.3. Recommendation 16: Improve Career Development Opportunities for Secondary Education Students	141
3.1.5.4. Recommendation 17: Advocate for More Pathway Courses and Associate Degrees Related to the Creative Economy	143
3.1.6. Professional Development	146
3.1.6.1. Recommendation 18: Host Professional Development Workshops and Lectures	147
3.1.6.2. Recommendation 19: Improve Professionalization Related to Copyright and IP with the Support of Legal Professionals	150
3.1.6.3. Recommendation 20: Formalize Creative Economy Internships	154
3.1.7. Infrastructure Development	157
3.1.7.1. Recommendation 21: Identify and Promote Spaces for the Creative Economy	160
3.1.7.2. Recommendation 22: Support Access to Increased Public Transportation in Delaware	164
3.1.8. Marketing and Audience Development	167
3.1.8.1. Recommendation 23: Offer Transit Shelter and Outdoor Advertising Space to Nonprofits	172
3.1.8.2. Recommendation 24: Improve the Maturity of Creative Industries-specific Marketing Practices and Knowledge with Work-Study Placements and Grants	174
3.1.8.3. Recommendation 25: Perform an Annual Marketing Campaign Promoting DelawareScene	176
3.2. Sector Snapshots	177
3.2.1. Audiovisual & Interactive Media	177
3.2.2. Performance and Celebration	179
3.2.3. Music Recording & Publishing	182
3.2.4. Cultural & Natural Heritage	184
3.2.5. Visual Arts and Crafts	186
3.2.6. Books & Press	188
3.2.7. Design & Creative Services	190
3.3. Implementation Timeline	192
4. Conclusion	194
5. Detailed Methodology	195

1. Introduction

1.1. Foreword

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, 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

1.2. About the Project

In January 2023, Sound Diplomacy was commissioned by the Delaware Arts Alliance to author this Creative Economy Advancement and Tourism Expansion (CREATE) Plan. The state’s creative economy already benefits from institutional support in the form of the Delaware Arts Alliance and the Delaware Division of the Arts, as well as advocacy, funding streams, research, and economic development from many other organizations. 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.

The implementation of this project’s recommendations set out in this report will respond to the following goals and aspirational outcomes. These were determined by key stakeholders in the early phases of this research:

- 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 from across the state together.

What is the Creative Economy?

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 from Colombia to the UK, Montreal to Barcelona,

the Asian Development Bank to the UN Conference on Trade and Development, it is a focus for economic growth and innovation for countries, cities, and organizations worldwide.

According to UNESCO, in 2020 the cultural and creative sectors accounted for 3.1% of the global Gross Domestic Product and 6.2% of the global employment.¹ 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.² Among the states, Washington State has a very strong creative economy: it accounts for 10.3% of the state's regional GDP and employs 180,000 workers.³ Another notable example is New Mexico, where the creative economy is accountable for 5.5% of employment.⁴ In both cases this success is no doubt partially thanks to the fact that these states support their creative economies by centering it in their tourism and economic development strategies and communications.⁵

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

- Grants people access to the arts and arts practice, which is important to quality of life and community building.
- 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

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. This would be especially relevant for downtowns, whose revitalization is a focus for the State and individual counties, towns and cities.

Delaware's creative economy accounts for 2.35% of employment, surpassing that of the more traditionally supported industries such as agriculture, for example. This is despite the fact that, as

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 CHOOSE Washington, "Creative Economy," accessed February 27, 2024, <https://choosewashingtonstate.com/why-washington/our-key-sectors/creative-economy/>.

⁴ Jeffrey Mitchell and Gillian Joyce, *Building on the Past/Facing the Future*, New Mexico Department of Cultural Affairs, 2014, <https://www.newmexicoculture.org/assets/files/reports/Summary-Impact-Report-Pages.pdf>.

⁵ For example, CHOOSE Washington has an individual titled Creative Economy Sector Lead, who works within the Washington State Department for Commerce. New Mexico has been researching and strategizing its creative economy since 2014.

our research revealed, the state's creative economy sectors are typically left out of economic development plans and are not thought about holistically. Delaware therefore has an opportunity to celebrate its existing success and create a future-facing creative economy and impactful arts & culture ecosystem.

Delaware's creative economy 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 here than 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.

From a proposed creative economy Task Force and increased youth access to the arts and professional development, to developing a statewide brand and strengthening ties between tourism and the creative economy, this strategy has been composed to help Delaware achieve the desired outcomes, outlined above. In identifying various legislative and programmatic areas for improvement, such as licensing and permits related to events, professional development, business support, and urban planning, this strategy addresses foundational topics which make a major impact upon any creative economy.

However, the creative economy and its institutions cannot do this alone, and require assistance from multiple agencies involved in 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.

Through the implementation of the following recommendations, tourism, community cohesion, education, economic development, and industry (among others) can all be further developed and strengthened. 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 statewide conversation.

1.3. About Delaware Arts Alliance

Following the national fiscal crisis of 2008, artists, art professionals and civic leaders across Delaware grew concerned about the future of the arts sector. They formed a 16-member coalition with the goal to raise awareness of the importance of the arts for economic and community development. The coalition brought together an initial group of 33 Delaware arts organizations to

form the Delaware Arts Alliance in 2009. Since then, the Alliance has nearly doubled in size and is a strong force in advocating for the arts at both the state and national levels.

1.4. 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, as well as how to stimulate economic, social and cultural growth. Sound Diplomacy’s team of economists, analysts, researchers and consultants are based across the UK, Europe, North America and Latin America and have delivered results across six continents, in over 100 cities and 25 countries. For more information, please visit www.sounddiplomacy.com.

1.5. Commitment to the Sustainable Development Goals

Figure 1. The UN’s SDGs



In 2015, through the United Nations, world leaders agreed to the Sustainable Development Goals (SDGs): 17 commitments and 169 targets with the aim of building a better world by 2030. These goals have the power to end poverty, fight inequality and address the urgency of climate change. Guided by these goals, it is now up to governments, businesses, civil society and the general public to work together to build a better future for everyone.⁶

Sound Diplomacy’s work takes the SDGs into account, with particular focus throughout the Strategic Plan. With member countries ratifying the UN’s SDGs, a code and framework to guide

⁶ United Nations, “The 17 Goals,” accessed January 9, 2024, <https://sdgs.un.org/goals>.

sustainable development has been established to influence development arrangements and contractual obligations of donors and grantees. While culture is not explicitly mentioned in the SDGs, it is viewed as a key element of all SDGs. The UN has conducted research to better understand the role culture can play in meeting sustainable development goals. The Culture in the SDGs research, conducted by the United Cities and Local Governments organization,⁷ is one example, and provides guidance on this topic.

1.6. Scope and Methodology Summary

The scope of work for this report has been a process of desk research, stakeholder consultation and data analysis. This was completed in the following stages:

Regulatory Assessment & Comparative Analysis: Coordinating with our partners in Delaware, Sound Diplomacy conducted thorough research into the regulations, laws and programs that are related to the seven discrete creative economy sectors, as defined in the 2009 UNESCO Framework for Cultural Statistics (the sectors which we treat as transversal in the qualitative work is explained above):⁸

1. Performance & Celebration
2. Music Recording & Publishing
3. Cultural & Natural Heritage
4. Visual Arts & Crafts
5. Books & Press
6. Audiovisual & Interactive Media
7. Design & Creative Services

In addition, research looked at three levels of regional focus involving ten jurisdictions:

⁷ United Cities and Local Governments, “Culture in the Sustainable Development Goals,” May, 2018, https://www.agenda21culture.net/sites/default/files/culturesdgs_web_en.pdf.

⁸ UNESCO, “2009 UNESCO Framework for Cultural Statistics,” 2009, https://uis.unesco.org/sites/default/files/documents/unesco-framework-for-cultural-statistics-2009-en_0.pdf.

Table 1. The Regions of Focus

statewide	COUNTY LEVEL	CITY/TOWN LEVEL
Delaware	New Castle County Kent County Sussex County	Wilmington Middletown Dover Smyrna Milford Georgetown

Asset Mapping Analysis: This mapping process identified creative, cultural and tourism-related assets in Delaware. The mapping was produced using a database built from secondary sources, reviewed by Sound Diplomacy and Delaware Arts Alliance, and georeferenced with Sound Diplomacy’s proprietary mapping tool.

Economic Impact Assessment: The economic impact analysis is based on official secondary sources and statistics, complemented by primary research conducted by Sound Diplomacy. It provides a reliable measure of the economic importance of the creative economy in Delaware on three scales: direct, indirect, and induced impact. During the research process, the most up-to-date data available from the County Business Patterns and RIMS II multipliers was from 2021, which means that this assessment has been developed based on figures from this year.

Within both the Literature Review and the context sections provided in this document, we reference additional research from other organizations that have studied the economic impact of the arts in Delaware, specifically the Arts & Economic Prosperity 6 report from Americans for the Arts.

Survey Analysis: A survey was developed and disseminated to those in Delaware’s creative economy: creatives and artists, creative and cultural-related businesses and organizations, and cultural audiences. The survey aimed to identify these local stakeholders’ perceptions and experiences within the Delaware creative economy. Responses collected from the survey have enabled Sound Diplomacy to identify challenges and opportunities within the local creative and cultural sectors and the common goals across local stakeholders.

SWOT Analysis: Analysis and collation of all findings from research stages detailed above. This informs the areas of focus in the Action Plan, and the recommendations.

Action Plan: All findings and analysis throughout this project inform a set of 25 actionable recommendations for the State of Delaware and identified partners to take forward. These are

categorized into 10 areas of focus, and arranged by proposed timeline for establishing the recommendation, how to implement it, any further considerations to take into account, and, where relevant, a best case example of another location, organization or partnership that is leading on a similar initiative.

1.7. Definitions

1.7.1 Definition of the Creative Economy

Based on the taxonomy provided by UNESCO,⁹ we define the cultural economy as being composed of 12 sectors:

- Performance & Celebration
- Music Recording & Publishing
- Cultural & Natural Heritage
- Visual Arts & Crafts
- Books & Press
- Audiovisual & Interactive Media
- Design & Creative Services
- Artistic Creation
- Industry Support - retail
- Other Professional & Business Support
- Cultural Education
- Festivals, Fairs and Conventions

The first seven of these are the sectors that we research for our qualitative work. The latter five are treated as transversal in the qualitative work.

According to UNESCO¹⁰ and UNCTAD,¹¹ the Cultural and Creative Industry (which in this instance is more or less a pseudonym for creative economy as we are using it in thai report) is defined as the group of sectors that “have as a main purpose the production or reproduction, promotion, distribution, commercialization of goods, services, and activities of cultural, artistic or heritage-related nature.”

⁹ UNESCO, “Framework for Cultural Statistics,” United Nations, 2009, <https://unesdoc.unesco.org/ark:/48223/pf0000191061>.

¹⁰ UNESCO, “Framework for Cultural Statistics,” United Nations, 2009, <https://unesdoc.unesco.org/ark:/48223/pf0000191061>.

¹¹ UNCTAD, “Creative Economy Outlook,” 2022, <https://unctad.org/webflyer/creative-economy-outlook-2022>.

The agents that make up the creative economy can work across diverse areas of the overall sectors. The common thread is that their activities are related to creativity and culture. Some elements of the economy, such as exhibition venues or producers, are obvious. Others, such as lawyers and managers, are less obvious. However, these less noticeable actors play an indispensable role in the economy.

For the creative economy to be healthy and to thrive, institutions must support, connect and provide resources to the agents that form it. Developing and implementing a creative and cultural strategy is a helpful tool for achieving this goal, as supportive programming, policies, and regulations can facilitate cultural activity, fostering strong relationships and increasing collaboration between the diverse actors in the ecosystem.

The agents can be grouped into one of the five links in the ecosystem value chain: Creation, Production, Distribution, Exhibition, and Transversal. See Figure 2.

Figure 2. Creative and Cultural Ecosystem Value Chain



Developed by: Sound Diplomacy

Additionally, the economic impact analysis examined the accommodation industry (including

hotels, hostels, and other traveler accommodation) as a proxy for the tourism industry in Delaware. This is in order to understand its size and contribution to the state's economy.

2. Cultural and Creative Industries Overview

2.1. Creative Economy Regulatory Assessment

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. The full regulatory assessment (which can be found in the appendix) is divided between:

1. **Cross-sector Regulations**

These are topics which are transversal to all creative sectors in nature and are also typically organized at the state level.

2. **Sector-specific Regulations**

These are topics which pertain specifically to the seven sectors we are studying, and which are typically organized at the state level.

3. **Regionally and Municipally Managed Regulations**

Based on our conversations with Delawarean stakeholders, we have identified the topics which are typically managed at a regional and municipal level, smaller than the state level.

Sound Diplomacy provided an analysis of what we found from our desk research, informed by the benchmark case studies.

Looking at the broad picture, 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 mostly attended to in primary and post secondary education, but secondary education students are underserved. While DEI&A 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 which understand its specific challenges and traits, and that work strategically to support and grow the sector.

When it comes to the individual sectors themselves, 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.

2.2. Creative Economy Asset Mapping Analysis

This mapping process identified creative, cultural and tourism-related assets¹² in Delaware. The mapping was produced using a database built from secondary sources, reviewed by Sound Diplomacy and Delaware Arts Alliance, and georeferenced with Sound Diplomacy's proprietary mapping tool.

The next section features the most relevant findings obtained from the Asset Mapping analysis. All categories are included and mapped on this [interactive map](#) tool developed specifically for Delaware.

The value of asset mapping to this project is evident in the below findings, but the tool can serve as an important element of future creative economy support and development by a host of organizations and individuals. Mapping the creative economy also allows Delaware to measure and monitor changes to the industries over time. The U.S. Department of Labor identifies a number of valuable uses for asset mapping:¹³

- **Resource Identification:** Though creative economy organizations and individuals in Delaware are no doubt aware of the creative resources specific to their immediate jurisdictions, resource identification across the state allows for a more global assessment of needs, leading to more specific strategic thinking.
- **Realignment of Strategic Planning and Implementation:** Asset mapping allows for an additional data set and bird's eye view that can help realign previous strategic plans and identify why they were, or were not, successful.
- **Deepened Understanding of Key Regional Systems and Linkages:** Asset mapping adds previously under-considered organizations and businesses to conversations that may have previously only included well-known and well-established entities, allowing for new and novel interlinkages.
- **Catalyst for Partnerships:** In contributing to the further unification of Delaware's creative economy, institutions and individuals can use the tool to find nearby like-minded creative entities, leading to previously unconsidered partnerships and collaborations.
- **Organizing and Motivational Tool for Implementation:** Seeing one's creative business or organization represented amongst many others across the state is exciting, and can contribute to a critical mass of motivation to realize strategic plans.

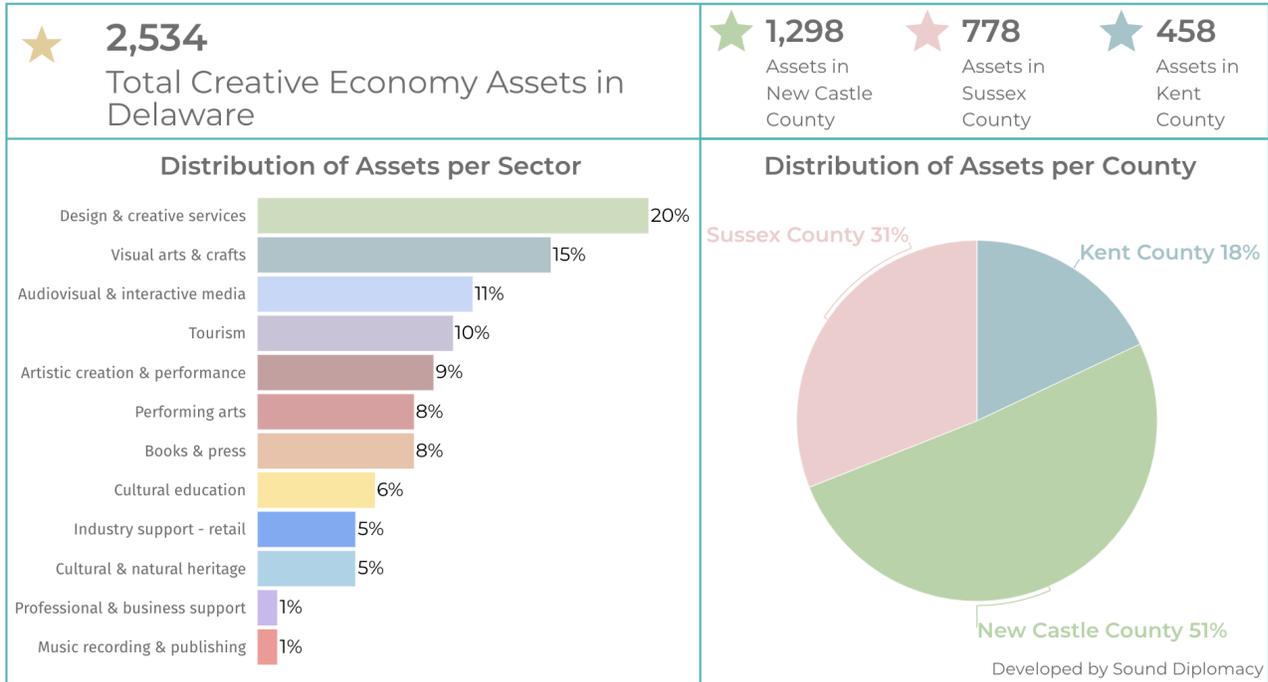
¹² An asset refers to a unique business establishment with a specific location that provides a service or product within the creative economy's production chain. These assets are integral components of the broader industry ecosystem, offering specialized contributions that enhance the sector's diversity, functionality, and economic vitality.

¹³ Compete Council on Competitiveness, "Asset Mapping Roadmap: A Guide to Assessing Regional Development Resources," jedc.org, accessed February 23, 2024,

<https://www.jedc.org/forms/Illuminate%20Guide%20to%20Asset%20Mapping.pdf>, 6.

2.2.1. Sectors, Sub-sectors and Categories Asset Count

Figure 3. Overview of Creative Economy Distribution by Sector and County

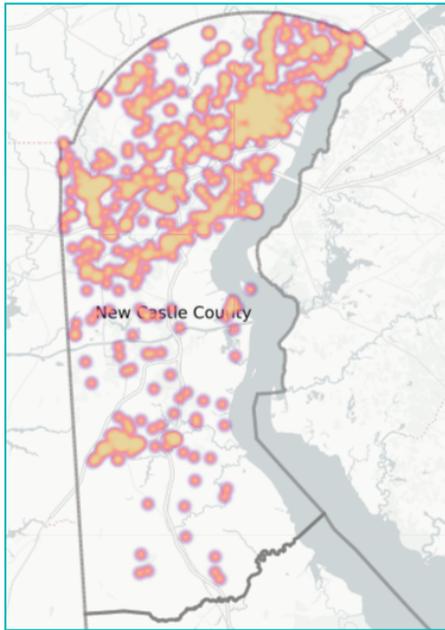


- **2,534 assets were identified in Delaware's creative economy.** The sector with the highest concentration of assets is design & creative services with 509 (20% of the total assets), followed by visual arts & crafts with 371 (15%), audiovisual & interactive media with 272 (11%), artistic creation & performance with 271 (9%), while books & press and performing arts both have 209 (8%).
- **Music recording & publishing, and other professional & business support have less prevalence than the other sectors,** with both accounting for only 1% of the total each.
- **In terms of sub-sectors, the ones with the highest presence in the state are visual arts creation with 330 (13% of total assets),** Specialized design creation with 262 (10%), Advertising with 181 (7%), cultural education with 164 (6%) and venue infrastructure with 147 (6%).
- **If we analyze the data by category, the biggest one is photographers (who sit within the visual arts & crafts sector) with 312 assets (12% of the total assets),** Advertising agencies with 181 (7%), Web hosting, video and audio streaming organizations with 140 (6%), public and private schools with cultural & creative programs with 113 (4%) and interior designers with 94 (4%).

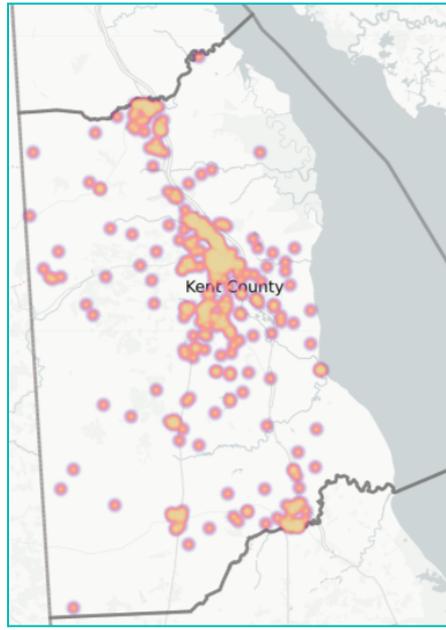
2.2.2. Spatial Distribution

Figure 4. Asset Distribution by County

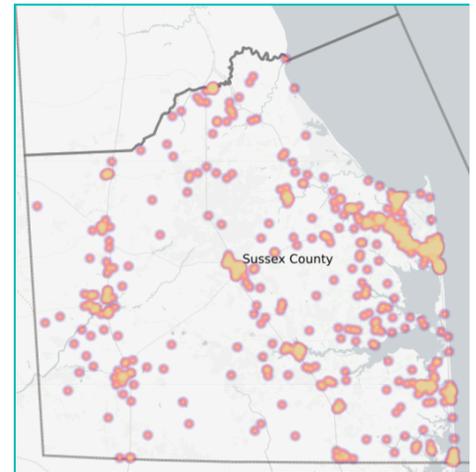
Assets Distribution in
New Castle County



Assets Distribution
in Kent County

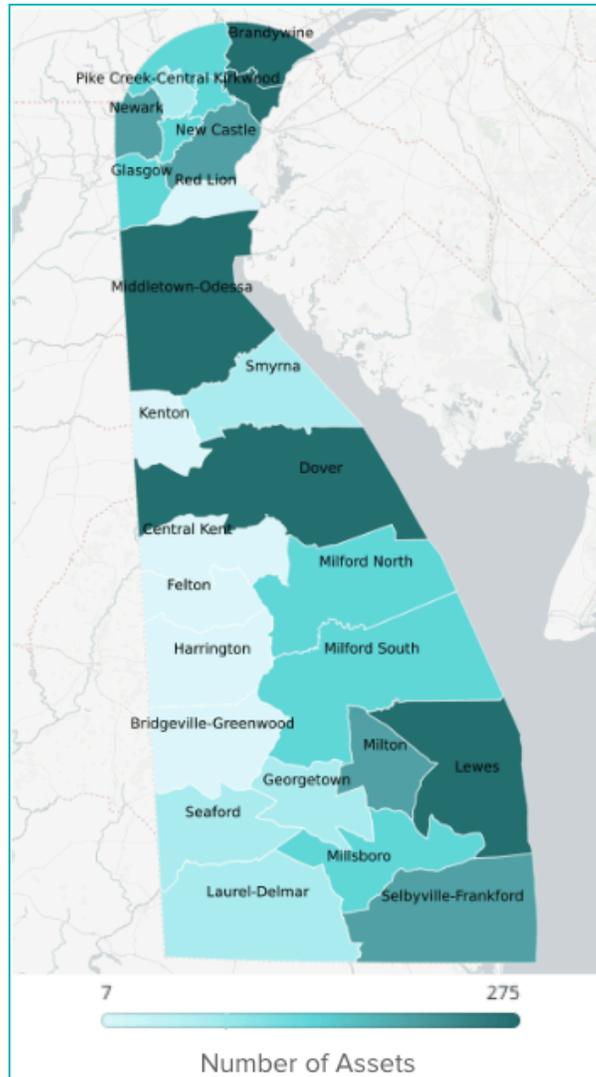


Assets Distribution in
Sussex County



- **The county with the highest concentration of assets is New Castle County with 1,298 (51% of Delaware's total),** followed by Sussex County with 778 (31% of the total) and Kent County with 458 (18%).

Figure 5. Heatmap of Assets Distribution by County Subdivision (City), from Asset Mapping

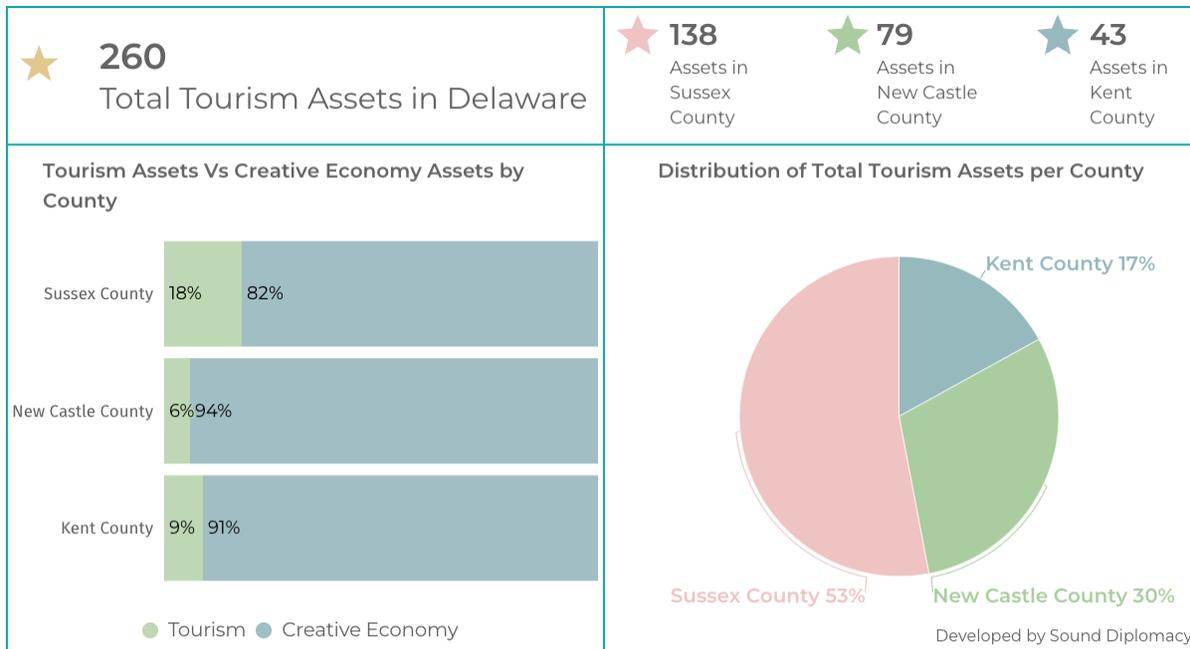


- The top 5 county subdivisions (cities)¹⁴ with the highest number of creative and cultural assets are Wilmington with 275 (11% of Delaware’s total), Lewes with 274 (11%), Dover with 273 (11%), Brandywine with 150 (6%) and Middletown-Odessa with 144 (6%).

¹⁴ The county subdivisions are official political geographies. In order to make sure the data used for regional analyses matched standards, subdivisions have been studied here rather than individual towns and cities, and in many instances subdivisions map onto cities or greater areas.

2.2.3 Tourism

Figure 6. Tourism Assets (Hotels and Accommodation) by County, from Asset Mapping



- **There are 260 assets in the Tourism sector.** The county with the highest concentration of these assets is Sussex County with 138 (53% of the total sector’s assets), followed by New Castle County with 79 (30%) and Kent County with 43 (17%). Sussex County is also the county where the Tourism sector has the highest share of the total mapped assets (at 18%). It is followed by Kent County with 9% and New Castle County with 6%.
- **By analyzing the mapping, we found that there is a geospatial correlation between tourism and performing arts and natural and cultural heritage.** This presents an opportunity for connecting both in order to develop Delaware’s cultural tourism further.
- **11% of all of Georgetown’s mapped assets are from the Tourism sector,** in comparison to Dover, for which Tourism has a 10% share, Smyrna 9%, Milford 8%, and Middletown-Odessa and Wilmington at 4% both.

2.3. Creative Economy Economic Impact Assessment

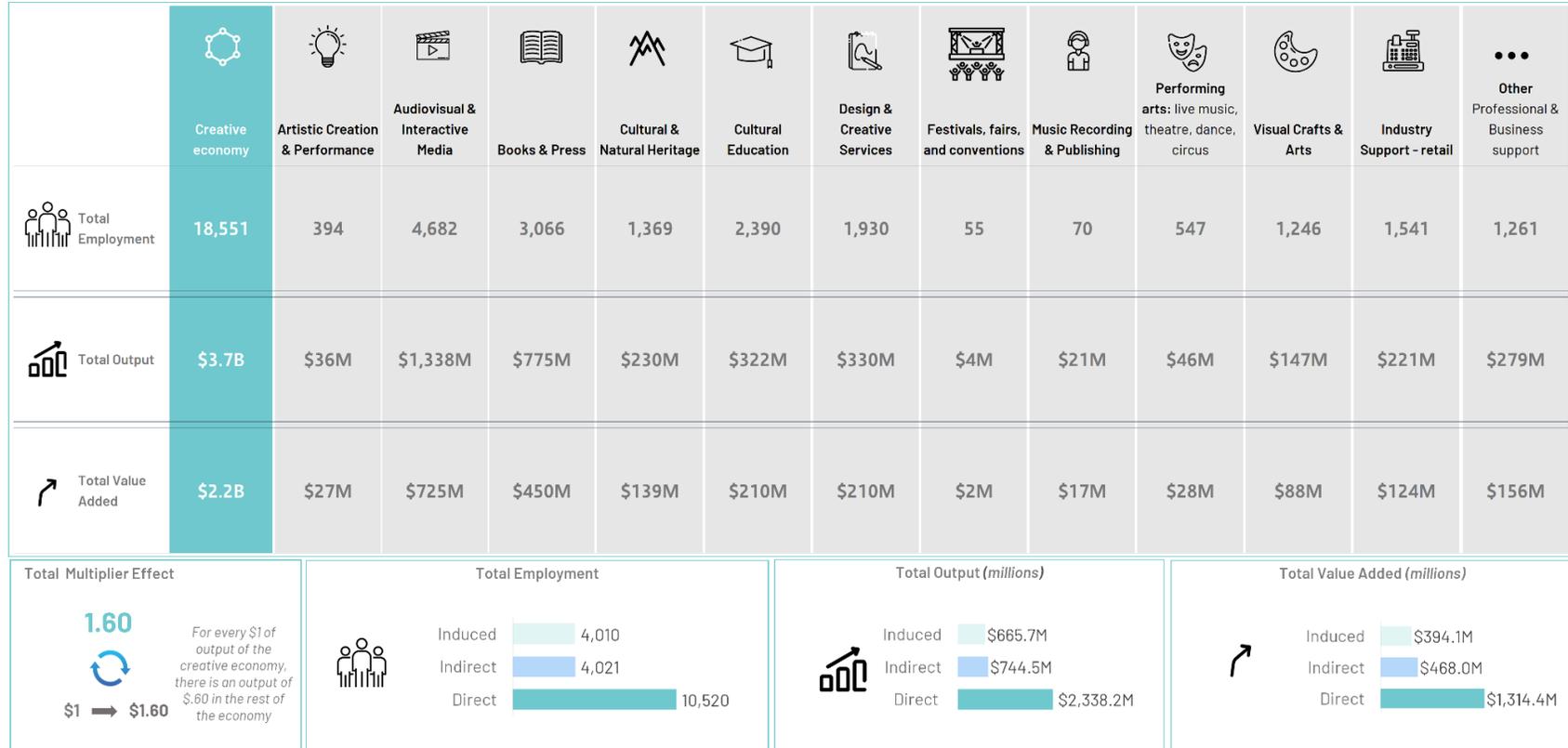
The economic impact analysis is based on official secondary sources and statistics, complemented by primary research conducted by Sound Diplomacy. It provides a reliable measure of the economic importance of the creative economy in Delaware on three scales: direct, indirect, and induced impact (for definitions see Table 7 below). During the research process, the most up-to-date data available from the County Business Patterns and RIMS II multipliers was from 2021, which means that this assessment has been developed based on figures from this year.

Table 7. Economic Impact Dimensions

ECONOMIC IMPACT	DEFINITION
Direct Economic Impact	The direct impact is the economic value and employment directly generated by the economic activity of the creative economy.
Indirect Economic Impact	The indirect economic impact measures the ripple effects on the economy, focusing on value and job creation in sectors that form part of the creative economy's supply chain. It encapsulates the demand-driven benefits for supporting industries, such as advertising, legal services, and food and beverage suppliers, which are integral to the Creative Economy's operations.
Induced Economic Impact	Induced impact refers to the economic effects generated when the ecosystem's direct and indirect employees spend their wages on goods and services such as food, transportation, and entertainment in their daily lives. This spending stimulates further economic activity within the broader community.

2.3.1 Total Economic Impact

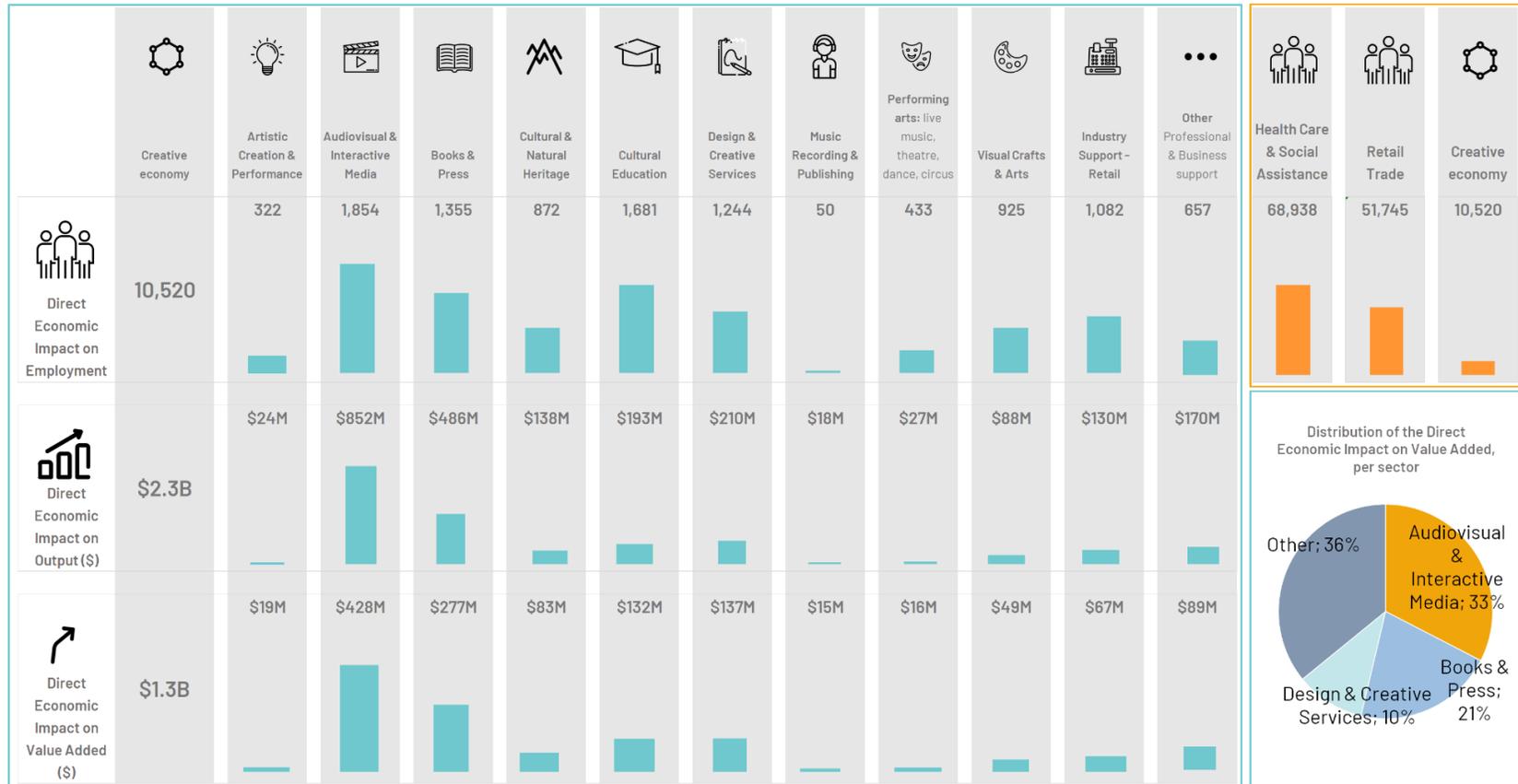
Figure 7. Key Findings: Delaware Creative Economy Total Economic Impact, 2021



- **The creative economy in Delaware supports 18,551 local jobs** (4.1% of overall local employment in the state), a **total output of \$3.7 billion** and a **total Gross Value Added to the state’s economy (GVA) of \$2.2 billion**.
- **The total multiplier effect in Delaware equals 1.603**. In Delaware, when the creative economy generates \$1,000, it leads to a total impact of \$1,603 on the local economy. This includes an extra \$603 created in various industries beyond the creative economy.

2.3.2 Direct Economic Impact

Figure 8. Key Findings: Delaware Creative Economy Direct Economic Impact, 2021



- **The creative economy in Delaware directly employs 10,520 individuals** (2.35% of the employment in the state), generating a **direct output of \$2.3 billion and a GVA of \$1.3 billion**.
- **Industry highlight:** Among the analyzed industries, the **highest direct output and employment is generated by Audiovisual & Interactive Media** with a direct output of \$851.9 million (31% of direct output in the ecosystem), and the employment of 1,854 individuals (18% of direct employment in the ecosystem).

2.3.3 Indirect and Induced Impact

- **Indirect Impact:** The ecosystem's indirect impact amounts to **\$744.5 million in output, \$468.0 million in GVA, and 4,021 jobs**.
- **Induced Impact:** Induced effects result in an **output of \$665.7 million, GVA of \$394.1 million, and 4,010 jobs**, which indicates a significant local expending by workers in the sector and their chain

2.3.4 Comparison with Other Sectors

- **The creative economy, directly employing 2.35% of the state's workforce, surpasses sectors** like Wholesale Trade (1.92%) or Agriculture, Forestry, Fishing & Hunting (1.13%), but is significantly smaller than sectors like Retail Trade (11.55%) or Finance & Insurance (7.59%).

2.3.5 Economic Trends (2017-2021)

- **Delaware's creative economy demonstrated varying trends in GVA values.** Following a decline of 6.6% of the GVA due to Covid in 2020, it rebounded with a notable 9.5% growth in 2021 (to \$1,314.40 million) exceeding its pre-pandemic level.

2.3.6 Employment Patterns and Demographics

- **Workforce Composition:** The creative economy sector is made up of 35.0% women, compared to 49.4% female representation in the workforce of the rest of the economy, indicating a gender bias in the ecosystem. When examining the workforce by race, we see **the workforce is predominantly White (72.3%)**, exceeding the distribution in the overall population (65.7%). **The proportion of Black/African-American individuals within**

the creative ecosystem's workforce represents 12.3%, which is significantly lower than the proportion of Black/African-American population in the state at 21.5%.

- **Income Disparities: The average income for workers in the creative economy sector is \$71,974, which is 29% above the average for the rest of the economy of \$55,582.** However, the average income in the ecosystem is very heterogeneous, with the highest average income found in the Design & Creative sector with \$93,177, while the lowest average income is found in Artistic Creation & Performance with \$29,868, below the average income for the rest of the economy. Please see the Appendix for the full breakdown of sub sectors.
- **Gender Pay Gap: Men in the creative economy on average earn 39.9% more than women** (\$79,957 vs \$57,148), which is a more pronounced gender pay gap when compared with the rest of the economy's already significant gap, where men earn 25.2% more (\$61,704 vs \$49,303).
- In the creative economy, **Asian individuals have the highest average income, reaching \$88,835 (20.2% more than white people).** White individuals follow with an average income of \$73,920, while Black workers earn on average \$60,231 (18.5% less than white workers).

2.3.7 Specialization

- **Audiovisual & Interactive Media Industry (which includes the film sector) in Delaware: A high establishment Location Quotient (LQ) of 1.81 in the industry signals robust concentration.** The state has a higher number of businesses in comparison to the national average, but a lower number of employees per business, shown by the employment LQ of 0.54. This suggests that the businesses in this state tend to be relatively small in terms of the number of employees they have.
- **Cultural & Natural Heritage Sector: Despite a modest establishment Location Quotient (LQ 0.84), the sector employs significantly more people (employment LQ 2.18),** surpassing the national average. Highlights focus on heritage preservation and community engagement. Initiatives can enhance visibility, partnerships, and economic growth.
- **Performing arts: live music, theatre, dance, circus:** The concentration of performing arts companies is notably lower, with an LQ of 0.39 for establishments and 0.33 for employment. This discrepancy may be reflective of challenges faced by performing arts organizations expressed in stakeholder engagement related to a lack of performance and rehearsal space and difficulties effectively marketing performances.

2.3.8 County Analysis

- **New Castle County’s creative economy** generates \$686.0 million in direct GVA and employs 5,489 individuals, while **Sussex County** generates \$369.0 million direct GVA and 2,953 jobs. **Kent County** generates \$259.4 million direct GVA and 2,078 jobs.
- Each county in Delaware boasts local strengths, **Kent County** in Cultural Education and Music Recording & Publishing industries, **New Castle County** in Artistic Creation & Performance and Performing arts, and **Sussex County** in Tourism and Industry Support. For the definitions of each of the aforementioned sub sectors please see the Detailed Methodology in section 5.

2.3.9 City Analysis

- **Out of the 6 studied cities, Wilmington (\$327.4 million, 21.2%) and Dover (\$188.6 million, 12.2%) are the top contributors to the direct GVA of the Creative ecosystem in Delaware.** Middletown generates \$54.0 million (3.5%), Georgetown \$28.5 million (1.8%), Milford \$20.7 million (1.3%), and Smyrna \$13.8 million (0.9%).

2.4. Creative Economy Survey Analysis

A survey was developed and disseminated to those in Delaware’s creative economy. The survey aimed to identify these local stakeholders’ perceptions and experiences within the Delaware creative economy. Responses collected from the survey have enabled Sound Diplomacy to identify challenges and opportunities within the local creative and cultural sectors and the common goals across local stakeholders.

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.¹⁵

The agents in the creative and cultural ecosystem can be grouped into one of the five links in the ecosystem value chain: Creation, Production, Distribution, Exhibition, and Transversal. For the purposes of the survey, the classification was simplified as follows:

- **Creatives:** includes creatives and artists from a wide range of different creative and cultural sectors, who make up the creation link in the value chain.

¹⁵ The sample for creatives and artists was made up of 127 observations (considering complete and partial responses). The sample of businesses and organizations was made up of 56 observations (considering complete and partial responses). Though not representative, these observations, when weighted, are used to give an indication of their trends and characteristics. The sample of cultural audiences was made up of 153 observations.

- **Companies and Organizations:** includes creative and cultural-related companies and organizations, such as publishers and distributors, managers and agents, live performing venues, broadcasters and cultural educators, who make up the links of production, distribution, exhibition, and transversal support in the value chain.
- **Cultural Audiences:** residents of Delaware who participate in the local creative and cultural ecosystem.

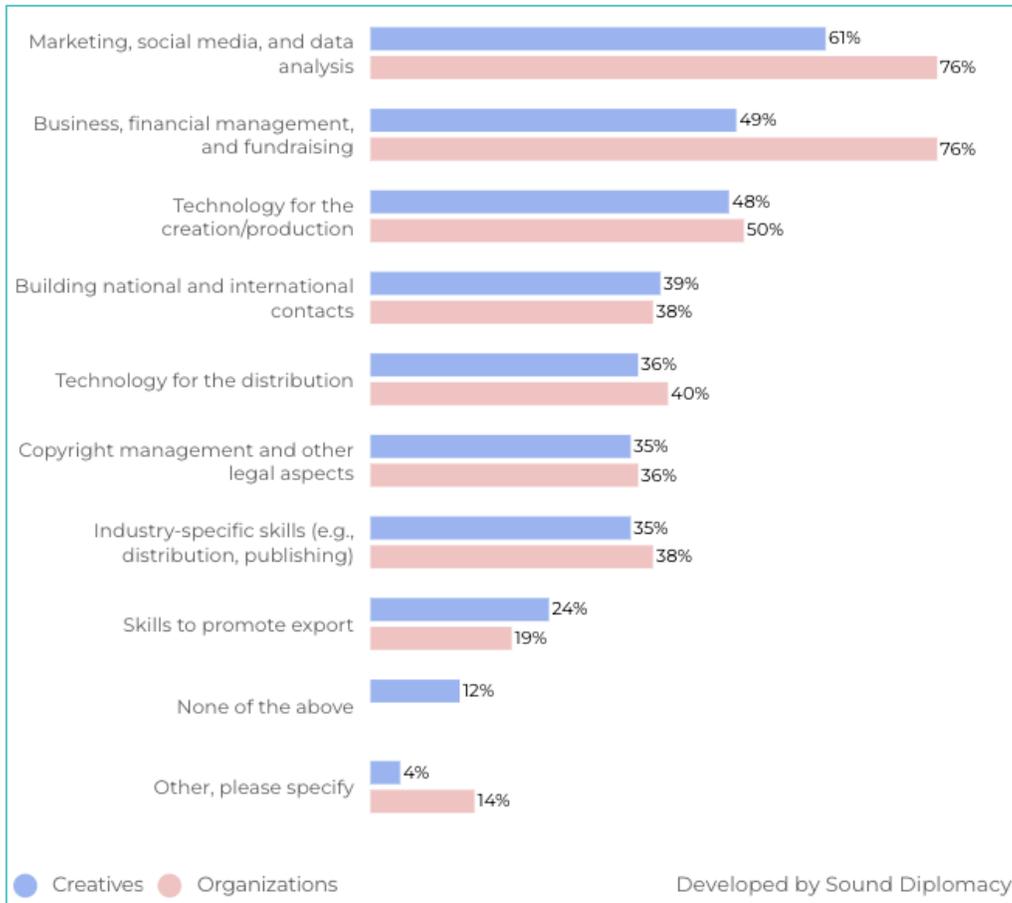
The following are the most relevant findings obtained from the Survey analysis.

2.4.1 Interdependence within the Creative Economy

- **Creatives and organizations show high interdependence with their own and other creative sectors. These respondents ranked both creatives from their sector and creatives from other sectors very highly** regarding the extent to which they rely on these for producing their work and **in terms of quality and availability**. This means that respondents are covering their needs in order to produce their creative and cultural work.
- **Creatives and organizations 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**, as opposed to suppliers located outside their city or town, be it within the county, the state, or beyond. This underscores a strong sense of community engagement.
- **Creatives and organizations report that they do not tend to rely on cultural intermediary stakeholders such as digital and physical distributors and producers, scoring them 2 or below (out of 5). Meanwhile, they score managers, booking agents and local promoters 1.9**. This finding suggests that creatives and artists frequently adopt a do-it-yourself (DIY) approach when booking live performances and producing and distributing their creative work. However, an excellent opportunity exists to strengthen ties between creatives and intermediaries and boost the ecosystem.

2.4.2 Skills Gaps in the Creative Economy

Figure 9. Skills or Knowledge Gaps in the Creative Economy, from Survey



- **Both creatives and organizations selected primarily the same top three skills they would like to acquire or improve:** marketing, social media and audience insights, with 61% for creatives and 76% for organizations; business, financial management, and fundraising with 49% and 76%, respectively, and technology for creation/production at 48% for creatives and 50% for organizations.
- **These skills are mainly related to business and management,** meaning that an opportunity exists to develop training in this regard to educate them, professionalize them, and ultimately drive the local ecosystem.

2.4.3 Creative Income

Figure 10. Creatives: Professionalization and Income by Sector, from Survey

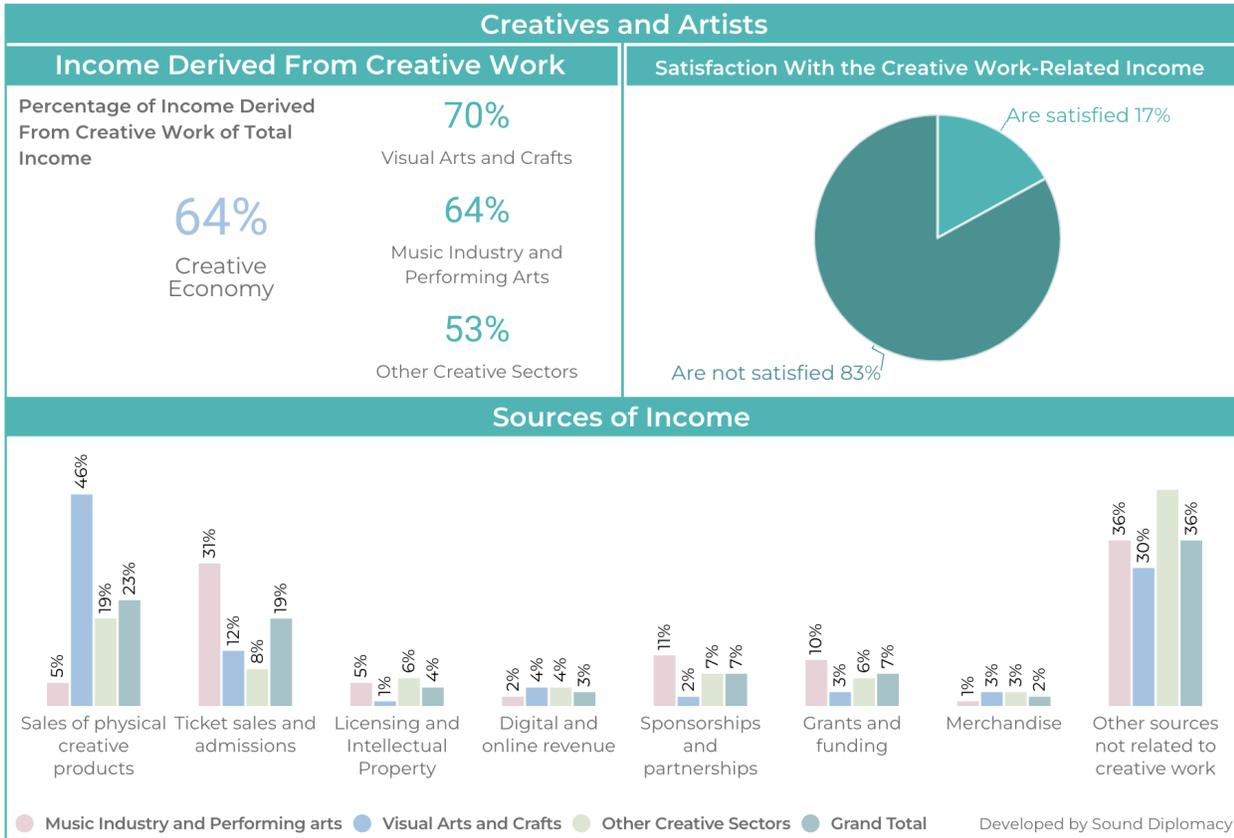
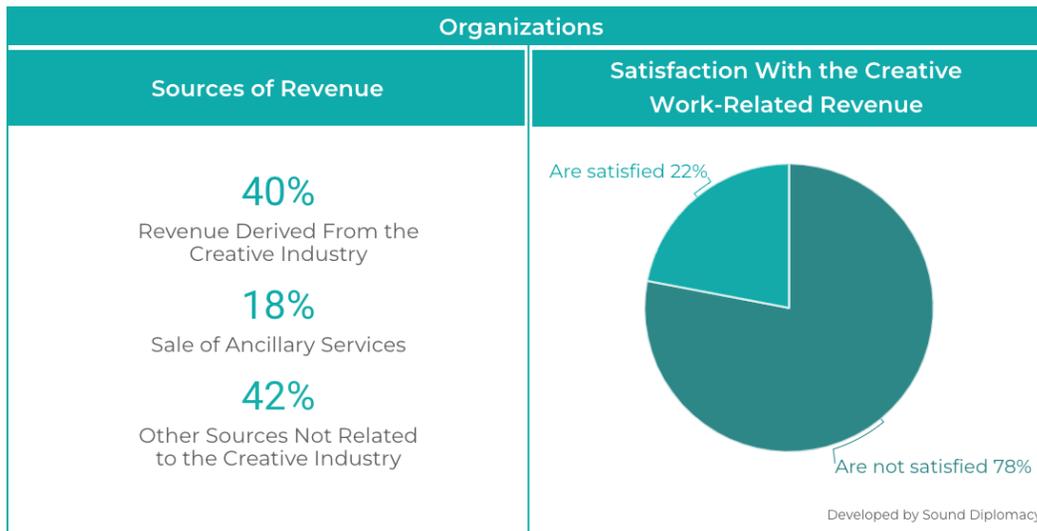


Figure 11. Businesses and Organizations: Main findings, from Survey



- **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.**

- **These results are consistent with the perception of both creatives and organizations that accessing financing, both public and private, presents a significant challenge to their success**, with an average rating of 3.6 out of 5 for both groups (where 1 indicates no challenge and 5 signifies a significant challenge).

2.4.4 Audiences

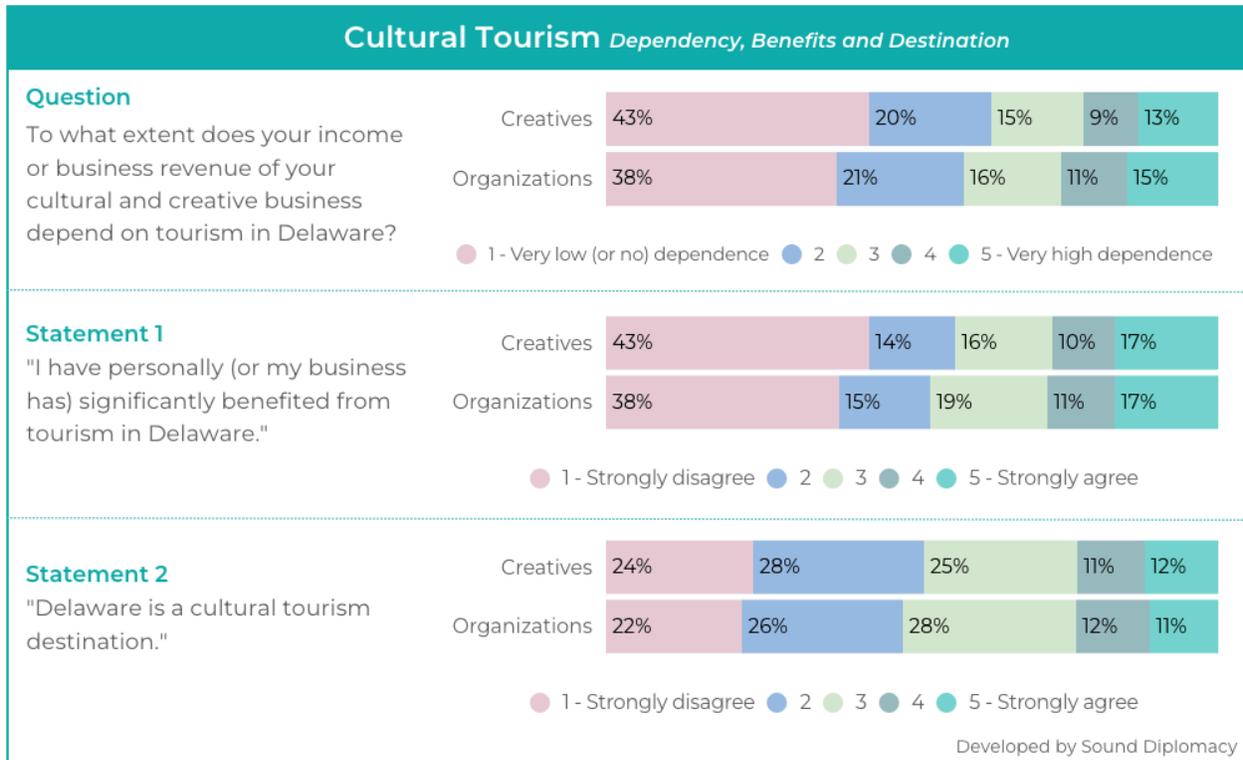
Figure 12. Cultural Local Audiences: Main Findings, from Survey



- **Surveyed local audiences in Delaware expressed their interest in cultural events in the state.** 69% responded they want to see more cultural events, 30% want but depending on the type of event, and only 1% expressed no interest in having more.
- **Analyzing respondents' inclination to explore distinct creative and cultural sectors, we observed a robust and varied level of interest.** Music was claimed the highest at 76%, followed by theater, opera, dance, and circus at 75%. Additionally, cultural and natural heritage (64%) and visual arts (64%) attracted significant interest, highlighting a broad spectrum of preferences across different sectors.
- **Local audiences ranked the quality of bookstores and libraries, museum archeological sites and cultural landscapes and music venues assets particularly highly**, with 3.9, 3.7 and 3.5 (out of 5), respectively.

2.4.5 Cultural Tourism

Figure 13. Cultural Tourism: Main Findings



- **According to the creatives and organizations surveyed, the tourism sector in Delaware is not perceived as a significant source of income.** They were asked to what extent their income from creative and cultural work depended on tourism (with 1 indicating very little or no dependence and 5 high dependence); 78% of creatives and 75% of organizations rated this reliance between 1 and 3. This is despite the fact that Delaware attracts many tourists, especially to its southern beaches. This suggests that there is room for growth when it comes to tying the local cultural economy into Delaware’s tourism economy.
- **Neither creatives nor organizations consider Delaware a cultural tourism destination.** These findings align with Delaware's tourism industry data, which ranks it among the five least-visited states in the United States.¹⁶ Rather than considering this as a problem, we see it as a significant opportunity for the state to promote both its tourism industry and the creative and cultural sector jointly.

¹⁶ Carla Vianna, "US Tourism Top states stats round-up post," XOLA, December 5, 2023, <https://www.xola.com/articles/us-tourism-top-states-stats-round-up-post/>.

2.5. SWOT Analysis

The following table (Table 8) provides a sector-specific and transversal theme analysis of all research and stakeholder engagement findings from this project. Internal Strengths and Weaknesses apply to those factors directly affecting the creative economy and its various sectors, while External Opportunities and Threats apply to factors outside of the creative economy, including sectors/industries that have a transversal effect across the creative economy (e.g. education & tourism). For regional-specific aspects please refer to the appendix document.

About Stakeholder Engagement

Between August and October 2023, Sound Diplomacy worked with the Delaware Arts Alliance and ten Community Engagement Captains to conduct a series of focus groups and one-on-one interviews with key stakeholders representing various creative industries, specializations and local leadership. The aim of these sessions was to gain a comprehensive understanding of the context of creative industries in the state of Delaware from the perspective of stakeholders who are involved in the day-to-day operation of the industries.

Through this process, we engaged a total of 227 stakeholders in over 25 sessions, as well as the 3 counties and 6 cities that are specified in the project’s scope. In addition, conversations and engagement took place with other relevant communities and institutions.

Table 8. Sector-specific and Transversal Themes SWOT

INTERNAL	
STRENGTHS	WEAKNESSES
Governance & Advocacy	

The Delaware Arts Alliance (DAA) has a long track record of advocacy and advancing the arts in Delaware with a focus on development, education, funding and research. The DAA is dedicated to advancing equity in the arts and arts education by informing, empowering, and mobilizing the sector.

The Delaware Division of the Arts (DDOA) offers a variety of grant programs for individual artists; nonprofit arts organizations based in Delaware; and schools and government entities that support arts activities.

The current research project has meant that DAA has brought many voices and perspectives into the fold and engaged many of Delaware's key stakeholders from across the creative economy.

There are a number of arts advocacy organizations in the state. Reel Families for Change is an advocacy organization oriented around the screen industries and pays special attention to equity issues. The Delaware Collective for the Creative Economy is a recently established, independent advocacy group which is working on various topics related to the creative economy.

Economic Impact

Despite a decline of 6.6% of the GVA due to Covid 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

Governance & Advocacy

There is no institutionalized structure for strategically supporting the full scope of the creative economy. This scope includes nonprofits, for-profit/commercial businesses, and individual creatives across all sectors and disciplines. While sectors from across the creative economy have strong representation by various organizations, these 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.

Different stakeholders and interest groups express feeling siloed and disconnected. This feeling is reinforced by what was described numerous times as the geographic divides that people experience within the state.

There is not enough connection between actors within creative economy sectors and business leaders in other economic sectors. Businesses located in the state rarely "give back" by investing in the arts. As stakeholders with experience in other states made clear, this is typically a major source of funding for nonprofit activities. Additionally, 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

The DDOA has secured a 25%+ increase in grant funding in the FY2024 State operating budget.

Along with the aforementioned grants offered by the DDOA, there are grants available from the Pete Du Pont Foundation, Mid Atlantic Arts Foundation, Delaware Heritage Commission, Delaware Humanities and the Delaware Community Partnership for actors from across the creative economy.

There are opportunities for increased public-private partnerships related to arts funding and projects.

Professionalization

There are various arts centers and groups located throughout the state. These tend to focus on a mix of providing extracurricular education, performances and events, creating a more equitable creative economy, and increasing public engagement with the arts. Amongst these centers are the Art Studio in New Castle County, the Sankofa Cultural Arts Center, the Inner City Cultural League and the Delaware Contemporary.

The state's arts community is passionate about championing arts in Delaware and maximizes every opportunity to do so.

Delaware is home to a wealth of talent and experience in a variety of cultural industries.

According to the survey, there are significant interconnections across diverse creative sectors.

Despite the fact that the average income for workers in the Creative Economy is 29% above the average for the rest of the economy, there is significant income disparity between different roles and individuals. Practicing artists, for example, generally subsist on far below the average income.

Sound Diplomacy's survey analysis indicates that a significant 83% of creatives and 78% of 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 with less than 5 employees, (70.7%), compared to 58.5% in the overall economy of the state. Small businesses and self-employed businesses are often more vulnerable to economic shocks and changes in market conditions, and also tend to have less time to initiate or sustain collaborative projects with other actors.

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

Delaware suffers from a brain drain, and generally does not attract younger professionals. Professionals that do live in Delaware rely on many collaborations outside of the state.

On average, creatives derive 64% of their income from sources related to their creative work. This percentage is higher for those in the visual arts and crafts sector, at 70%. The music industry and performing arts sector follow closely at 64%, while other sectors within the creative economy lag at 53%. This lack of ability to rely

The Delaware Arts Alliance , and does host stakeholder engagement events and sessions with people throughout the state.

The Delaware Division of the Arts' Artist Career Development (ACD) pilot program provides two-years of sustained career support for emerging or mid-career Delaware artists, and selects an artist from each county. They also host an Arts Summit focused on building community and skills.

Marketing & Audience Development

DelawareScene is a website that covers the whole state and allows anyone to submit events and activities for inclusion. It is searchable using different filters and has been developed thanks to support from DDOA. The calendar aims to provide an overview of all cultural activities taking place in the state. It is also home to an artist roster, an arts jobs board, and an arts opportunities board (listing art competitions and open calls, etc.).

Innovative non-digital marketing efforts, such as pop-up truck performances for Opera events, have reached rural areas with some success.

Surveyed local audiences in Delaware expressed their interest in cultural events in the state. 69% responded they want to see more cultural events in general. This represents a significant untapped audience.

on creative work to pay living costs is likely stifling the development of key sectors.

Funding and Financing

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

The FY2024 state operating budget has approved an increase in budget for the DDOA to \$5,248,282, up from \$3,880,015 in 2023.¹⁷ This represents approximately 0.001% of the state's overall budget for 2024. Aside from the recent increase, the budget has been stagnant for a decade, representing a real term decrease, and there is no line item in the State budget regarding nonprofit arts funding.

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

Funding is not seen by stakeholders to be equitably distributed throughout the community and is often distributed on a legacy basis.

Valuation is an issue, with governments and citizens possessing an outdated view of the creative economy and therefore not fully appreciating the benefits of government investment into the creative economy or arts.

¹⁷ National Assembly for State Arts Agencies, "State Arts Agency Legislative Appropriations Preview, Fiscal Year 2024," accessed December 8, 2023, <https://nasaa-arts.org/wp-content/uploads/2023/07/FY2024-SAA-Legislative-Appropriations-Preview.pdf>.

Delaware Libraries have produced the Outdoor Learning and Experiences for Delaware Libraries project, designed to create outdoor placemaking experiences tailored to community needs and conditions at each Delaware library.

Placemaking

There are placemaking programs within the state that have an arts component. This includes the Delaware State Park Trail Challenge, the Outdoor Learning and Experiences for Delaware Libraries project, and the Freeman Arts Pavilion's Arts Access Initiative, amongst many others.

There is a preponderance of open spaces within cities and rural areas that might be better utilized for cultural activities and events.

Audiovisual & Interactive Media

Reel Families for Change and the Delaware Collective for Creative Economy are leading the charge to grow the Audiovisual sector in the state.

Audiovisual & Interactive Media generates the highest direct output (\$851.9 million - 31% of direct output), and employment (1,854 individuals - 14% of direct employment) in Delaware's creative ecosystem. This is echoed by our location quotient research, which shows that there is a high concentration of Audiovisual assets in the state.

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 (as confirmed by Sound Diplomacy's survey). Additionally, based on the survey, actors from the local creative and creative economy feel they are lacking knowledge and training opportunities in regards to business, financial management and fundraising.

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, scoring 2 or below (out of 5). Managers, booking agents and local promoters received a score of 1.9 from creatives.

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

There is a dearth of marketing agencies in Delaware. 61% of surveyed individual creatives and 76% of surveyed creative institutions list marketing as a top professional skill they would like to acquire.

According to Sound Diplomacy's survey analysis, only 25% of creatives protect and monetize their artistic work through copyright

There is an existing and moderately established film and media industry in the state including individuals with a wealth of professional expertise and connections.

There is an opportunity to enhance visibility and support in this sector to take advantage of the growing interest in Delaware as a filming location

Sound Diplomacy mapping found a significant number (140; 6% of total cultural assets) of web hosting, video and audio streaming organizations in the state. This equals an establishment quotient of 1.4, meaning that Delaware has above the national average amount of businesses in this sector.

Performance & Celebration

There are theaters across the state that are programming shows all year round and engaging with local students.

The Grand Opera House, Wilmington has had success reaching rural areas and attracting new audiences.

Delaware State Parks operates regular programs and events and a summer concert series.

There are major music-related events, such as the Ladybug festival and the Clifford Brown Jazz Festival.

Visual Arts & Crafts

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. Despite its comprehensiveness, DelawareScene does not appear to be widely known throughout the state.

Sound Diplomacy’s survey analysis found a diminished emphasis on social media/internet marketing in the state, indicating an overall lack of digital maturity.

Stakeholders say that traditional media coverage is limited and advertising is often prohibitively expensive.

Based on the survey, actors from the local creative economy feel they are lacking knowledge and training opportunities in regards to marketing, social media and audience insights.

There are museums dedicated to the fine and plastic arts, such as the Delaware Art Museum and the Biggs Museum.

There are numerous arts centers and Art Leagues active across the state, for example in Dover and Yorklyn, as well as the New Castle County Art Studio, which hosts arts workshops.

DDOA hosts the Mezzanine Gallery, an Arts Summit, and a podcast, which by and large supports actors in this sector.

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. Our survey analysis shows that audiences have high opinions of museums and cultural landscapes.

According to Sound Diplomacy's economic impact report, this sector has a modest concentration of businesses (0.84), but an above average employment rate (2.18), suggesting large and well-established organizations.

Delaware's Historic Preservation Tax Credit Program assists in preserving and rehabilitating historic buildings throughout Delaware

Cultural Heritage and Humanities groups in the state have expressed a general desire to synergize with the arts.

The survey and stakeholder engagement sessions revealed that there is a need for out-of-state audience development to position Delaware as a locus of culture and arts events.

Audiovisual & Interactive Media

Compared to key players elsewhere in the country, Delaware is lacking industry standard permit practices, tax incentives, workforce development, and DE&I standards. House Bill 465 was designed to support the Audiovisual sector but failed to pass.

The ratio between establishments to employment in Delaware's Audiovisual sector is significantly below the national average, as the audiovisual sector has an employment quotient of only 0.35. This means that, compared to the number of businesses in the sector, employment numbers are lower than expected.

The Delaware Motion Picture and Television Development Commission's activity is uncertain. It is difficult to assess its activity from desk research, and stakeholders explained that there has been no transparency about the use of a recent budget designation. There is also some confusion amongst stakeholders as to the relationship between the Commission and Delaware Film.

Delaware does not have a comprehensive index or map of resources or important information for those working in film to utilize.

Emphasis on traditional "motion picture" production is outdated when the sector includes major contributions from the related fields

Delaware has a wealth of historical sites and parks.

The Delaware Historical Society is a nonprofit organization that preserves, promotes, and shares Delaware's history in order to educate, inspire, and empower people and communities.

The Delaware Division of Historical and Cultural Affairs has an education curator who develops programs related to this sector for K-12 students.

There is an upcoming museums study that will explore the economics of the historical organizations that exist in the state.

Books & Press

Books & Press plays a large role in both employment (3rd 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.

There are ongoing efforts to revive local journalism, such as The Local Journalism Initiative, which provides an internship program and has founded the Delaware Journalism Collaborative.

of advertising, radio, television, and digital media production and broadcasting.

Performance & Celebration

It was noted by stakeholders that local residents do not have an appetite for original works when it comes to music and theater.

At present, Delaware lacks a centralized performance venue registry.

Permits and licensing processes 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 and a lack of transparency regarding decisions, and stifles the growth of this sector in the state.

Stakeholder engagement suggested that certain minority promoters and audiences have been discriminated against by landlords of outdoor spaces in the state.

By and large, application processes have to be done by paper, and there are reports of it taking up to five years to gain clearance for a one day event that involves closing a street.

When asked which licenses and permits pose difficulties, the most common responses included "liquor license," "events permits," and "photo and filming permits." Sound Diplomacy understands that this issue would need to ultimately be addressed at the regional

The state has dual Poets Laureate: Nnamdi O. Chukwuocha and Albert Mills.

The Delaware Division of the Arts hosts a Writers' Retreat.

Design & Creative Services

Out of all the sectors, the Design & Creative sector boasts the highest average income at \$93,177.

According to Sound Diplomacy mapping, Design & Creative Services is the sector with the greatest number of assets across Delaware (509; 20% of total assets). A majority of these are based in the Wilmington and Dover areas.

Music Recording & Publishing

The prevalence of small businesses and self-employed establishments within the music ecosystem suggests an entrepreneurial spirit in this sector.

Despite its relatively small size, our economic impact assessment shows that the Music Recording & Publisher sector contributed nearly the same GVA to Delaware's economy (1.1%) as the performing arts did (1.2%).

(city/town and county) levels. Acquiring liquor licenses for for profit events is particularly challenging.

There are no ordinances regarding all ages shows.

Sound Diplomacy found no Agent of Change provisions anywhere in Delaware.

Wilmington has the most amount of detail in its sound ordinances. Regardless, sound ordinances across the state are unsupportive of the creative economy, i.e. they do not provide decibel levels for amplified musical performances, are not designed to accommodate cultural activity (especially featuring amplified music), and the complaints procedure is not clear.

Liquor licenses are complex and old fashioned.

Overall, downtowns are not sufficiently organized to support the night time economy.

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. The mapping shows that a majority of the venue infrastructure in Delaware is clustered around the greater Wilmington area and Lewes/Rehoboth Beach.

Visual Arts & Crafts

Visual Arts & Crafts exhibits a slightly below national average concentration in Delaware, indicating a moderate presence of businesses (0.83) and employment (0.57).

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

Cultural & Natural Heritage

Though Cultural & Natural Heritage represents one of Delaware's most robust sectors, it is largely siloed and does not regularly collaborate with other sectors in the wider creative economy.

Books & Press

This sector is disconnected from others in the creative economy. It is not often thought of as part of the wider ecosystem.

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

Design & Creative Services

Despite there being assets in this sector, Design & Creative Services lacks representation within the broader creative economy and is not typically included in the programs and events hosted by various arts organizations.

Music Recording & Publishing

	<p>This sector is generally underdeveloped.</p> <p>Few creatives in the state utilize or understand the importance of copyright registration procedures. This is particularly important for this sector.</p> <p>Creatives in Delaware lack spaces for rehearsal or workshops. The lack of rehearsal spaces and recording studios for musicians was confirmed by our mapping. There is a particular issue with a cluster of assets in the north of the state, and very little in the south.</p>
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EXTERNAL	
OPPORTUNITIES	THREATS
<p>Education</p> <p>The Delaware Arts Alliance (DAA) and the Delaware Division of the Art (DDOA) are both well connected with the Delaware Department of Education.</p> <p>The Delaware Arts Standard Coding system for primary education follows the conceptual framework laid out by the National Coalition for CORE ARTS Standards, which encompasses dance, media arts, music, theater, and visual arts. All school districts need to provide</p>	<p>Education</p> <p>While arts education at the primary level follows the national Standards for Visual and Performing Arts, survey and focus group participants report that arts education is not prioritized in schools and is not valued in the education system. 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.</p>

<p>evidence to the Department of Education that their curricula are aligned with these standards.</p> <p>The DDOA promotes access to arts education for Pre K-12 youth in Delaware.</p> <p>Delaware Institute for the Arts in Education delivers arts-integrated, multicultural experiences to students of all ages.</p> <p>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%).</p> <p>Delaware Pathway Programs are provided by Delaware Pathways, which connects Delaware youth with educational and employment opportunities.</p> <p>The University of Delaware has various arts and culture related programs, including an 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.</p> <p>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.</p> <p>There is increased attention on Associate Degrees (at Delaware College of Art and Design (DCAD), for example).</p>	<p>Not all schools have full time arts educators in schools, and some schools don't have the space to dedicate to arts education.</p> <p>There is a severe lack of arts education access for students (especially from lower income backgrounds) at the Secondary level.</p> <p>There is difficulty getting arts and culture adjacent topics and courses into the pathways program. At the time of writing, the only pathway with crossover into the creative economy is the Digital Communication Technology course.</p> <p>Over recent years, the amount of creative economy-relevant University level degrees available has fluctuated. While this is starting to improve again, these students are not closely tied with the local creative ecosystem.</p> <p>There are issues with geographic and social accessibility to arts education in the state, with rural and minority communities the most neglected.</p> <p>Cultural Ecosystem Challenges</p> <p>Downtown development projects have not generally included or centered the arts or creative economy. In some places, such as Wilmington, there is an identity crisis (such as decrease in office culture) alongside changes to populations, which is changing the nature of community engagement in these spaces. Stakeholders say that mixed use spaces in Downtown districts are not realizing</p>
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<p>Many nonprofit organizations run arts educational programs and engage young people.</p> <p>According to stakeholders, public libraries play a vital role in providing access to arts education for young people in the state.</p> <p>Financing & Funding</p> <p>Tax incentives and funding structures common to other sectors, like tech, could be replicated for the creative economy.</p> <p>Additional funding streams, such as the lottery and franchise taxes, could be applied to the creative economy.</p> <p>Tourism</p> <p>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. A 2021 Value of Tourism report shows 45% of visitors to Delaware participate in some cultural activity and 65% in some entertainment activity.¹⁸</p> <p>The mapping shows geospatial correlation between tourism, performing arts and natural and cultural heritage. This presents an opportunity for connecting both in order to develop Delaware’s cultural tourism further.</p> <p>New Castle County is the only county with the highest concentration of cultural assets but also the lowest number of</p>	<p>their full potential. This ties in with our desk research finding that Downtown plans are generally lacking a strong cultural element.</p> <p>Proximity to cities such as Philadelphia and New York provide Delaware with a challenge. In regards to the Audiovisual sector, nearby states such as New York and Georgia have extensive tax incentives and resources for those working in the film and media industries. Due to the proximity of Philadelphia, mid to large tier musical artists do not typically visit Delaware during tours. Overall, Neighboring states have much stronger financial incentives and support for sectors within the creative economy.</p> <p>Sound Diplomacy’s survey analysis found that ancillary creative services like managers, booking agents, local promoters, producers, and equipment suppliers are mainly located outside the city and outside the state (but within the U.S.).</p> <p>The “Delaware way”, which stakeholders often described as a culture of resisting innovative thinking, can keep networks closed and opportunities missed.</p> <p>Neighboring states and cities are already established centers for sectors such as the design and creative services and music recording and publishing.</p> <p>Tourism</p>
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¹⁸ Visit Delaware, “The Value of Tourism 2021,” visitdelaware.com, accessed February 21, 2024, <https://www.visitdelaware.com/sites/default/files/2023-05/The%20Value%20of%20Tourism%202021%20FINAL.pdf>

tourism assets. This suggests that the connection between tourism and culture may not be strong, and that cultural assets may mostly be being engaged with by residents.

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

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.

Diversity, Equity, Inclusion & Access

There are advocacy organizations working on the ground in Delaware to improve equity in the creative economy for women, BIPOC, disabled folks, and the LGBTQ community.

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.

While these possibilities for cooperation between tourism and the creative economy in the state, Sound Diplomacy's economic impact analysis identified a significant regional distinction with this subject. The bulk of cultural activities in the state are centered in the northern New Castle County, but the area does not have much in the way of tourist activities as it is overshadowed by Philadelphia. Conversely, there is significant tourism activity in southern Sussex County, but very little in terms of cultural economic activity.

In terms of branding, Delaware is seen as a "pass-through" state. This encourages people to leave the state for activities rather than engage locally.

Diversity, Equity, Inclusion & Access

Prominent voices in the state's art 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. This lack of representation across the board is affecting opportunities for equitable economic development and building audience engagement throughout and outside the state.

There are reports of unequal treatment to professionals from marginalized backgrounds.

BIPOC communities and neighborhoods in Delaware are disproportionately less affluent than white communities, as confirmed by a report on the racial wealth divide in Wilmington published by Prosperity Now.¹⁹ Economically marginalized groups are much less likely to be well represented in volunteer groups for nonprofit projects. This situation is compounded by the fact that funding and grant programs are not, in the main, targeted towards these communities, and that grant-winning projects are not required to cultivate diversity themselves.

Gentrification is taking place in some locations across the state, while elsewhere low income neighborhoods are art deserts.

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 (72.3% of the workforce) are overrepresented, given that white people represent 65.7% of the

¹⁹ Prosperity Now, “Racial Wealth Divide in Wilmington,” March 2019.

general population. Black/African-American individuals compose 12.3% of the creative economy workforce, which is significantly lower than their proportion of the general population (21.5%).

Asian individuals command the highest average income, standing at \$88,835, followed by white individuals at \$73,920, while Black and Other ethnicities have comparatively lower average incomes at \$60,231 and \$53,748, respectively.

According to our economic impact, the creative economy sector is made up of 35.0% women, compared to 49.4% female representation in the workforce of the rest of the economy, indicating a gender bias in the ecosystem.

Men in the creative economy on average earn 39.9% more than women (\$79,957 vs \$57,148), which is a more pronounced gender pay gap when compared with the rest of the economy, where men earn 25.2% more (\$61,704 vs \$49,303).

There are issues with geographic accessibility to arts education in the state.

The average income is higher for workers that have a high education level attained in the creative economy sector with \$84,312, while workers with medium education earn \$55,778, 51.2% less than highly educated workers and workers with basic education earn \$34,147, 146.9% less than highly educated workers.

Transport

Public transport limitations are an issue restricting Delaware's potential. This includes a lack of evening public transport and, in some places, no weekend links either.

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.

3. Action Plan

This section summarizes our research and provides recommended actions to address weaknesses and leverage opportunities, all with the aim of strengthening and growing the creative economy in Delaware. There are a total of 25 actionable recommendations split between eight themes, with proposed timeframes for initiating implementation, instructions on how to implement, and, where relevant, a best practice example from another location.

Topics have been determined by the needs and wants of Delaware's creative economy and its stakeholders, as discovered during the entire research process. Each topic begins with a contextual overview, formed of information that has informed the proceeding recommendations. Sector snapshots have also been provided in section 3.2, these highlight key findings from the research relevant to each studied sector, and note the most relatable recommendations to them.

Given the importance of Diversity, Equity, Accessibility & Inclusion to Delawareans involved in this research and the Delaware Arts Alliance itself, specific notes related to DEA&I have been added to recommendations where relevant. The same has also been done in relation to regionality. Often, considerations on DEA&I and regionality are also integral to the recommendations themselves.

3.1. Advancement and Expansion Plan

Before embarking on the individual recommendations, we will outline how Delaware can integrate DEA&I and sustainability into its creative economy strategy.

Diversity, Equity, Accessibility & Inclusion

Sound Diplomacy recommends the following imperatives to be applied to all creative economy programs and initiatives:

- Consider gender balance of the artists, creators, performers and intermediaries and other professionals involved in creative economy programs.
- Consider representation of Delaware's diverse community in artists, creators, performers and intermediaries and other professionals involved in creative economy programs.
- Consider gender balance of the speakers, trainers, and mentors involved in all training sessions, panels and workshops and, where possible, consider sessions that specifically address the unique challenges and opportunities faced by marginalized groups.
- Ensure representation of speakers, trainers, and mentors that reflect Delaware's diverse community.

- Ensure that the different brands and promotional materials feature a diverse representation of Delawareans, including gender, ethnic, and cultural diversity.
- Establish criteria that considers gender, ethnic diversity and cultural inclusivity when providing financial support.
- For each program or initiative, actively seek collaborations with cultural organizations that focus on gender equity and cultural diversity, both in Delaware and nationally and internationally.
- Every time a written resource is produced, create a Spanish language version in order to accommodate increasing bilingualism.
- Include KPIs and metrics specifically related to gender equity and cultural diversity in the strategy's impact assessment of each initiative.

Where relevant, context-specific imperatives regarding DEA&I are included in the recommendations.

Sustainability

Additionally, recognizing the pressing need for environmental consciousness, those leading the creative economy must prioritize sustainability. Embracing sustainability is not just an ecological imperative but a strategic move that aligns with global environmental goals and attracts environmentally conscious consumers, fostering a responsible and resilient creative economy. For these reasons, Sound Diplomacy recommends the following considerations to be applied to all creative economy programs and initiatives:

- Consider environmental sustainability in the commissioning of artists, creators, and performers through creative economy programs.
- Ensure that environmental sustainability is a concern for speakers, trainers, and mentors participating in training sessions, panels, and workshops, with a focus on addressing the unique challenges and opportunities faced by marginalized groups wherever possible.
- Establish eco-criteria or bonuses when providing financial support to institutions.
- Actively seek collaborations with organizations that prioritize environmental sustainability and cultural diversity, both within Delaware and nationally and internationally, for each program or initiative.
- Include Key Performance Indicators (KPIs) and metrics specifically related to environmental sustainability in the impact assessment of each initiative.

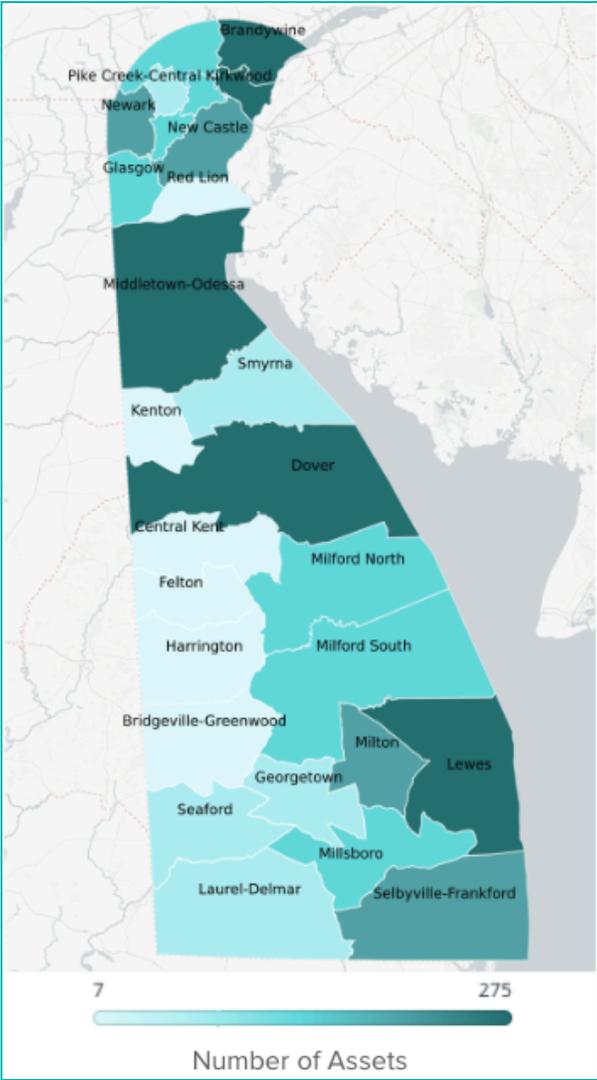
3.1.1. Creative Economy Development

The creative economy in Delaware contributes a significant economic impact to the state's overall economy, supporting 18,551 local jobs (4.1% of overall local employment in the state), a total output of \$3.7 billion and a total Gross Value Added (GVA) to the state's economy of \$2.2

billion. Compared with other sectors in terms of employment, the creative economy surpasses industries such as wholesale trade and agriculture in the state. The Arts & Economic Prosperity 6 reports from Americans for the Arts shows that in 2022, nonprofit arts activity generated \$209.4 million in economic activity in the state.²⁰

Despite these contributions, the creative economy in Delaware is regionally uneven. Various stakeholders in more rural parts of the state noted feeling left out of Delaware’s creative scene, and Sound Diplomacy’s mapping, which shows a heavy concentration of assets in Wilmington and New Castle County, reflects this:

Figure 14. Heatmap of Assets Distribution by County Subdivision (City), Mapping

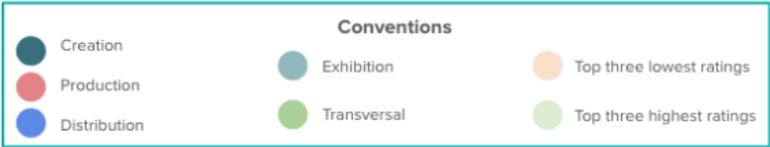


²⁰ Americans for the Arts, “Arts & Economic Prosperity 6: The Economic & Social Impact Study of Nonprofit Arts & Culture Organizations & Their Audiences in Delaware.” (Washington, DC, 2023), 4.

On the subject of collaboration, Sound Diplomacy’s survey analysis sought to assess the cohesion of the creative economy. The findings show that creatives and organizations most value “creatives, artists, and performers” from the same cultural and creative sector in terms of relevance, quality, and availability, followed by the same group from other cultural and creative sectors. Additionally, both stakeholder engagement and the survey found that creatives tend to use resources from outside Delaware in the production of various cultural products. While this may point to a lack of professionals in the state, it also suggests that, while specific sectors primarily prioritize collaboration with their own, there is ample opportunity for increased cross-sector collaboration from within, rather than without, Delaware.

Figure 15. Creative Economy Sector Value Chain: Relevance, Quality and Availability, Survey Analysis

Stakeholders of the Creative Economy Ecosystem	Creatives and Artists - Relevance	Creatives and Artists - Quality	Creatives and Artists - Availability	Organizations - Relevance	Organizations - Quality	Organizations - Availability
Creatives, artists, and performers from the same cultural and creative sector	3.5	3.6	3	4.2	3.8	3.1
Creatives, artists, and performers from other cultural and creative sectors	2.9	3.6	3.3	3.7	4	3.6
Managers, booking agents, and local promoters	1.9	2.5	2	2.2	2.9	2.7
Equipment suppliers	2.1	3	2.3	2.5	3.5	2.5
Producers	1.8	2.5	1.9	2	2.9	2.3
Physical distributors	1.6	2.1	1.6	1.9	2.6	1.7
Physical retail stores or rental outlets	2.4	2.8	2	1.7	3	2.3
Exhibition venues	3.3	3.2	2.4	3.3	3.4	2.7
Festivals and fairs	2.7	3.2	2.7	2.8	3.4	3
Local authorities or regional and national governments	2.2	2.7	2.4	2.8	2.9	2.5
Cultural education	2.4	3	2.5	3	3.2	2.4
Composers and creators associations	1.8	2.4	2	2	3	2.3



Supporting the Full Scope of the Creative Economy

While the Delaware Arts Alliance (DAA) is a strong representative of the arts, and the Delaware Division of the Arts (DDOA) supports the arts in various ways, there is currently no comprehensive strategy for strategically supporting the full scope of the creative economy in Delaware. This

scope includes nonprofits, for-profit/commercial businesses, and individual creatives across all sectors and disciplines. Additionally, while the DAA and DDOA represent the entire state, their focus is on the most culturally active regions. Key stakeholders are not in regular dialogue, various sectors are often missing from the conversation, and the full potential of DelawareScene as an index and catalog of the state's creative economy is not yet being made the most of by actors both within and outside of the state. Strategic planning for the creative economy need not sit only with existing arts and cultural institutions, and more divisions of Delaware's government need to have a role in supporting the creative economy. In order to demonstrate the full value of the creative economy and support it in the future, every responsible party (including Divisions of tourism, small business, education, and more) should be involved.

Tourism is at the heart of this support, as Delaware stands poised to become a cultural destination in the area whilst exporting arts & culture elsewhere in the country and globally. The creative economy has proved to be a particularly resilient sector, especially in the contexts of COVID-19 and climate change, and this resiliency can be used to further girder tourism and a variety of other related sectors.

Sound Diplomacy's survey analysis observed a high level of dependence and interrelation with creatives from their own sectors, as well as creatives from other sectors. This demonstrates strong interconnections across all the creative sectors. Despite these findings, roundtable participants expressed feeling siloed and disconnected, an issue that limits opportunities for cross-sectoral collaboration. This feeling is reinforced by the noted geographic divide faced by many outside of New Castle County. Without collaboration and a developed ecosystem with a preponderance of opportunities, many creatives in the state are forced to relocate elsewhere contributing to a significant cultural brain drain in the state.

Due to structural and funding siloing, one point of potential collaboration that has thus far failed to materialize involves museums, the humanities and cultural heritage. Groups representing these sectors in the state have a general desire to synergize with each other and the arts. Delaware has a wealth of activity taking place across all these disciplines and sectors, and this provides an opportunity for collaboration and mutually beneficial audience development programs, innovative projects, and more. Additionally, Delaware's universities are currently generally detached from conversations about the creative economy. This is despite the fact that they are sites of research and cultural activity and potential audiences, as well as being important parts of the communities they are based in.

Supporting the full scope of the creative industries in Delaware also means reckoning with the lack of diversity in the creative ecosystem. The prominent voices representing the state's art scene tend to be homogenous, and the overlap between income and racial inequality means that BIPOC individuals are more likely to be excluded from arts and cultural activities. One group that

has worked to address this issue, the Delaware Collective for the Creative Economy (DCCE), is a localized initiative of Reel Families for Change (RFG, described in the Audiovisual section below), that works “to develop equitable pathways to industry access regardless of self-identification, caretaker obligations, or geographic location.”²¹

Cultural Hubs/Districts/Spaces

Cultural hubs and districts often offer fertile soil from which a developed creative economy can grow, but there are no centralized Cultural Hubs or Incubators in the state. Creatives lack spaces and networks for rehearsal and development. There are studios, centers, and organizations working towards these ends but they are, again, siloed and do not have any formal relationships between each other. There are numerous arts centers across the state, for example in Dover and Yorklyn, as well as the New Castle County Art Studio. Despite Kent County generally being described as being poorly served in regards to the arts, Dover has a Cultural Arts Center, an Inner City Cultural League, and stakeholders described the local Art league as being very supportive.

Downtowns, typically the site for intensive creative collaboration in any city, are not realizing their full potential in serving the creative economy. Mixed use spaces especially are not readily available and, in general, Downtown Development projects do not secure people sufficient access to cultural activities with arts and culture largely missing from these plans. Sound Diplomacy found that legislation concerning Entertainment Districts in the state is non-existent. While Dover has announced an Entertainment District, there is little infrastructural support to encourage tax breaks or address zoning issues.

As our literature review shows, there were strong efforts in the recent past to develop a cultural district in Wilmington. A 2014 plan by the Wilmington Renaissance Corporation sought to expand cultural activity along Market Street into a 25 block creative community, but that program is no longer in operation and the city does not have an officially designated cultural district.²² Downtown development projects have not generally included or centered the arts or creative economy. There is in some places, such as Wilmington, a cultural identity crisis (alongside changes to populations, which is leading to a lack of community engagement in these spaces. Stakeholders say that mixed use spaces in Downtown districts are not realizing their full potential. This ties in with our desk research finding that Downtown plans are generally lacking a strong cultural element. It is worth noting that Dover has actively identified a Cultural District within its borders.

Regulatory/Permitting Environment

²¹ Reel Families for Change, “Delaware Collective for Creative Economy,” accessed January 12, 2024, <https://reelfamilies.org/dcce>.

²² Wilmington Renaissance Corporation, “A Vision for Wilmington’s Creative District” (Wilmington, DE, 2014), 1-92. *Not available publicly.*

Our survey analysis sought to assess Delaware’s regulatory environment as it pertains to the creative economy, and found that licensing and permitting pose significant challenges to the larger ecosystem. When asked which licenses and permits pose difficulties, the most common responses included "liquor license," "events permits," and "photo and filming permits”.

Sound Diplomacy’s regulatory assessment found that there are often no clear event permitting and licensing guidelines. By and large, application processes have to be done by paper, and there have been reports of it taking up to five years to gain clearance for a one day event that involves closing a street. On top of this, stakeholder engagement suggested that certain promoters and audiences from underrepresented communities have been discriminated against by landlords of outdoor spaces in the state.

Sound ordinances across the state lack objectivity, are not designed to accommodate cultural activity (especially featuring amplified music), and the complaints procedure is not clear. Most significantly, the liquor licensing process is complex and old fashioned, with one stakeholder describing the process as “archaic.” Overall, a regulatory refresh is needed to encourage the larger development of the creative ecosystem in the state. Relatedly, Sound Diplomacy was unable to identify any ordinances or provisions concerning All Ages events or Agent of Change.

Conclusion

Whilst Delaware has a number of successful and well-supported creative industries, the creative ecosystem in general is in need of support to develop a well-rounded creative economy. To achieve this, we have recommended strategies for the development of cross-sector initiatives and points of cooperation, while also refreshing existing permitting structures to allow for more effective and easily-executed cultural events and happenings.

Presently, the organizations that provide strategic oversight and management of different parts of the creative ecosystem (museums, humanities research, the arts) are siloed from each other. This siloing is due, in part, because public funding delineates between sectors such as the arts and heritage, for example, rather than encouraging cross-sectoral collaboration. In reality these sectors have numerous opportunities to collaborate. As noted in Sound Diplomacy’s economic report, in order for the creative ecosystem to be healthy and to thrive, institutions must support, connect and provide resources to the agents that form it. Implementing the following recommendations would work towards achieving this goal, as supportive programming, policies, and regulations can facilitate cultural activity, foster stronger relationships, and increase collaboration between the diverse actors in the ecosystem.

3.1.1.1. Recommendation 1: Establish a Creative Economy Task Force That Continues To Build Cross-Sectoral Collaboration and Engage Stakeholders

Action

Supporting Stakeholders: Delaware Division of the Arts, Delaware Arts Alliance, Delaware Humanities, Division of Small Business, Visit Delaware, Division of Historical and Cultural Affairs, Department of Education, Delaware State University, University of Delaware, the Delaware Museum Association, Delaware Pathways, Delaware Technical Community College, Delaware Prosperity Partnership, Delaware Motion Picture and Television Development Commission; Delaware Division of Libraries, Key freelancers and stakeholders from prominent creative economy businesses.

Goals:

- Address topics related to DEA&I
- Improve governance and strategic thinking
- Raise awareness of the creative economy and share knowledge across creative sectors
- Foster cross-sector collaboration and interdisciplinary dialogues

Timeframe: Short Term (1-24 months)

Description: Build a Creative Economy Task Force composed of decision-making stakeholders from key organizations from across the entire creative economy. Quarterly meetings will be used to further the implementation of the recommendations in this report, open opportunities for cross-sectoral collaboration, and be a chance to plan the implementation of creative economy programs and develop policy proposals. The Task Force will provide the creative economy with a level of organization and legitimacy common to other revenue-generating sectors.

The Task Force should engage key stakeholders from public and private for- and nonprofit organizations, institutions and prominent freelancers that are in a position to support the implementation of the recommendations provided in this strategic report, and to shape and inform long-term strategic thinking across the creative economy. The expectation would be for the individuals involved in the Task Force to partake on a voluntary basis, though an organizer/chair will need to be identified from within one of the key supporting stakeholders.

This Task Force would foster collaboration between the arts, education, humanities, heritage organizations, creative industry entrepreneurs, and the wider economy. It is important to think about how the different creative sectors intersect, and to cultivate collaboration between them

and with the wider economy, such as technology and finance sectors. While the different sectors of the creative economy will continue to require specialized management, creating the opportunities for key stakeholders in these sectors to consistently interact and build relationships will foster interdisciplinary collaborations, grow audiences, and better advocate for Delaware's creative economy.

Whilst the Task Force is concerned with the entirety of the state's Creative Economy writ large, consideration should be given to striking sector specific working groups that oversee the specificity of implementing this plan for each individual sector and making sure the recommendations' regional considerations are actioned. The individuals comprising the working groups will initially have some overlap with the task force, but efforts should be made to engage specialists in each sector from diverse backgrounds. In addition to sector specific working groups (e.g. film and media, performing arts, etc.), groups tasked with additional relevant topics such as education and DEA&I should be considered.

Although this Task Force won't have legislative powers, it will create a formal opportunity for stakeholders across the creative economy more broadly to form networks, whilst identifying and advocating for ways to strengthen the cultural and related industries. In addition, it can be drawn upon by DAA's Project Lead when necessary.

Implementation Considerations:

- Identify an organizer/chair from within one of the key supporting stakeholders.
- Use the asset map to identify which businesses and stakeholders from the for-profit sector, including freelancers and entrepreneurs, should be represented in this Task Force.
- Based on the supporting stakeholders list provided above, invite representatives from key organizations that impact Delaware's creative economy to be represented in this Task Force:
 - A persona/position from each of the listed government organizations should be given the role of Task Force Liaison and be the main point of contact for the office/department/division at any one time.
 - The person performing this role should be changed on a rolling basis (e.g. every two years.)
 - To facilitate legislative support, a State senator could also be included in this Task Force or be a point of contact for it.
- Representatives from different creative economy sectors in this Task Force should bring knowledge and comments from stakeholders (business owners, management, employees, etc.) from across the state to meetings in order to inform conversations and decisions.

- Key advocacy groups from across the creative economy should be invited to participate in the Task Force and inform policy and program proposals.
- These individuals may also be encouraged to staff sector-specific working groups.
- Coordinate on advocating for important policy and legislative proposals, starting with those related to the performance and film and new media sectors (see recommendations [3](#) and [8](#)).
- Find a viable location in each of the three counties in which the meetings can be held on a rotating basis.
- A quarterly schedule needs to be created alongside an agenda for each meeting, which could include:
 - Alignment with desired outcomes of further collaboration.
 - Shared pressure points and difficulties.
 - Upcoming events, campaigns and projects.
 - Funding and financing opportunities.
- **Diversity, Equity, Accessibility & Inclusion Imperatives:**
 - Ideally, the Task Force will reflect gender parity at all times and make significant efforts to ensure that it reflects the racial and cultural diversity of the state, guaranteeing the participation of members of the creative economy who have been traditionally marginalized.
 - An initial knowledge sharing and alignment session after the Task Force is formed should concern the development of guidelines related to DEA&I within the creative economy. These should outline both the ambitions of a more equitable creative economy and provide guidance on actions that organizations and businesses can take.
 - This initial session should precipitate the creation of a Working Group specifically focused on DEA&I issues which work as an oversight committee to provide feedback on any proposals that require equitable considerations.
 - These guidelines can be inspired by best practices from the USA (such as American for the Arts' inclusive Creative Economy Plan) and abroad (such as the UK Parliamentary Group for Creative Diversity), but also informed by local residents and stakeholders.²³ These guidelines can later be made available online and also distributed through the communication channels of the organizations in the Task Force.
- **Regional Considerations:**

²³ Jessica Stern, "Introducing Americans for the Arts' Inclusive Creative Economy Plan," *Americans for the Arts*, February 25, 2021 <https://blog.americansforthearts.org/2021/02/25/introducing-americans-for-the-arts-inclusive-creative-economy-plan;> UK All-Party Parliamentary Group for Creative Diversity, "Making the Creative Majority," *Kings College London*, October, 2023, <https://www.kcl.ac.uk/cultural/resources/reports/making-the-creative-majority-2023/making-the-creative-majority-policy-recommendations.pdf>.

- The Task Force should include voices from all three counties to ensure that they are considered and represented in any advocacy work, business, or creative opportunities that the Task Force generates or supports.

Possible meeting topics may include:

- Existing statewide and national funding streams that could be applied to interdisciplinary research and projects.
- New potential sources of funding for the arts and arts-oriented activities in the state (see [Recommendation 12](#)).
- Opportunities for the for-profit (including freelancers and entrepreneurs) and nonprofit sectors to collaborate for the overall benefit of Delaware's creative economy businesses.
- The historical and present barriers to implementing Entertainment Districts in cities and towns throughout the state, along with next steps for implementing such legislation. This includes assessing which best cases exist, what zoning and licensing laws would need to be revised, who would need to be in charge of leading these changes in each region, whether there is public support for such work, etc.

Further Considerations:

- Initially, this Task Force is a way for public bodies to align and strategize collectively. Over time, especially when Delaware's business community is more aligned with the state's creative economy (see [Recommendation 5](#)), private bodies such as Delaware's Chamber of Commerce could be brought into the fold so that the for-profit side of the creative economy can be better supported.
- Include Delaware's universities to support development of long term cross-sectoral support for the creative economy in the state. As the following benchmark illustrates, many interdisciplinary projects internationally are closely tied with academic institutions and research centers.
- In the future, the State could investigate the potential of the Task Force being institutionalized as a Committee with legislative power of its own, like the Motion Picture Committee has currently.

Benchmark: South East Creative Economy Network (SECEN), UK²⁴

What It Is: The South East Creative Economy Network (SECEN) is a regional public initiative aiming to accelerate growth in the digital, creative and cultural sector in South East England. It functions by bringing together stakeholders from local authorities, creative businesses and education bodies.

The network utilizes data that demonstrates how the creative economy significantly boosts the UK economy, evidenced by a substantial increase in recent years. South East England is home to over 15,000 creative businesses that constitute 9.6% of the total businesses in the South East Local Enterprise Partnership (SELEP) area. SECEN works toward sustaining and enhancing the region's appeal for the creative sector, with a specific focus on recognizing the valuable contributions of freelancers and self-employed practitioners to the creative economy.

To achieve this, SECEN actively identifies obstacles to growth and implements practical and scalable initiatives aimed at overcoming these challenges. By aligning the efforts of businesses, education providers, strategic organizations, and local authorities, SECEN is positioned to lead one of Europe's most diverse, integrated, and productive creative regions. With a clear vision for the sector within the SELEP area, SECEN is dedicated to fostering an environment that supports creativity, innovation, and sustained growth.

Who Is Responsible: The South East Local Enterprise Partnership (SELEP) is a partnership for growth between business, government, and education. The Network is also supported by Arts Council England, East Sussex County Council, Essex County Council, and Kent County Council.

What It Has Done: The Network has coordinated multiple high impact projects. This includes the cultural route project, "England's Creative Coast",²⁵ which is a landmark project between seven arts organizations — Cement Fields, Creative Folkestone, De La Warr Pavilion, Hastings Contemporary, Metal, Towner Eastbourne and Turner Contemporary — to create a new outdoor cultural experience that connects art with landscape. The project's goal was to transform the approach to cultural tourism in the South East of England in order to establish an outdoor cultural experience for visitors, be they international, national, or local, by intertwining art with the landscape and local narratives with global perspectives. The project's impact report states that up until 2022

²⁴ "Our Network", South East Local Enterprise Partnership, accessed November 24, 2023,

<https://www.southeastlep.com/our-network/working-groups/south-east-creative-economy-network/>.

²⁵ England's Creative Coast, "About", accessed November 24, 2023. <https://www.englandscreativecoast.com/about>.

that it had “400,000 engagements,” generated £8.4M worth of economic activity, and brought £1.9 million of economic impact into the region.²⁶

The project consisted of six key components:

1. Waterfronts Commissions: This involved the creation of seven artworks commissioned from international artists, strategically placed along the South Coast in Essex, Kent, and East Sussex.
2. Local Engagement and Art GeoTour: Accompanying each Waterfronts Commission was a program focused on community engagement, aiming to develop "the world's first-ever art GeoTour."
3. Art Homes: This was a pilot initiative encouraging individuals to offer their properties for short-stay holidays, providing visitors with an immersive art experience connected to the local cultural milieu.
4. Partnership Working: The project united seven major cultural partners and destination management organizations for the first time, harnessing the collective strength of their collaboration.
5. Multi-Channel Marketing Strategy: Developed in collaboration with partners, this strategy was designed to reach new tourist audiences, optimize alignment with key cultural events in the region, and specifically target UK and international travel journalists to foster coverage.
6. Information Base: The project placed a significant emphasis on developing knowledge through research, training, and shared learning, constituting a fundamental aspect of its overall framework.

The Network also developed the SELEP Creative Open Workspace Masterplan and Prospectus project. This project fosters growth, innovation, and prosperity by identifying the workspace requirements of the Creative Industries. It addresses a gap in suitable workspace for the Creative Cultural and Digital Sector, across the South East area. There has also been the Catalyst For Culture partnership between three theaters/performing arts organizations across the region. This was a pilot scheme for the development of performing arts production, training and skills development and as the foundation for a wider regional touring circuit. The direct economic impact of Catalyst For Culture was over £1.5 million against SELEP’s investment of £181,700, representing a return of £8.26 for every £1 invested.²⁷

²⁶ RMR, “England’s Creative Coast Evaluation Report,” March 2022, 5, <https://www.southeastlep.com/app/uploads/2019/09/ECC-Final-Report-FINAL.pdf>.

²⁷ “Catalyst For Culture Final Report,” accessed January 5, 2024, 13, https://www.southeastlep.com/app/uploads/2020/11/SELEP-Report-Catalyst-for-Culture-SEP2022_FINAL.pdf.

Relevance for Delaware: This case demonstrates ways in which collaborative working from different regional stakeholders can impact an area’s cultural economy and tourism offering. By formalizing the relationship between businesses, education providers, strategic organizations, and local authorities, SELEP was able to apply for national funds for the implementation of cross-sectoral projects that results in innovative economic growth. This presents Delaware with an idea of how the proposed Task Force could be developed in the long term, and the sort of projects they could be tasked with ideating and implementing.

Benchmark: Equity in Music and Entertainment Task Force and Report, Madison, WI²⁸

What It Is: A result of the establishment of the Task Force on Equity in Music and Entertainment, the Equity in Music and Entertainment Report was published in 2018. The aim was to combat the lack of access to performance opportunities within licensed commercial venues, such as bars, parks, and festivals, that was experienced by musicians and entertainers of color (and particularly those from the hip-hop community).

While the main focus of the task force was to improve representation of all underrepresented genres of music and entertainment, the impetus for its formation was specifically on hip-hop due to negative associations about its impact on public safety, leading it to remain ‘misunderstood and, at times, feared’.²⁹ This had resulted in cyclical patterns regarding the programming of hip-hop performances in Madison, evidenced firstly by a surge in local hip-hop performances which drew crowds to performance venues, then the occurrence of a fight or disturbance, leading to venues’ reluctance to program hip-hop shows.

With recognition that the unequal access experienced by performers of color can cause detrimental impact to Madison’s cultural diversity, sense of community, and economy more generally, the report outlines a series of best practices in other cities regarding security, structured events, and arts in education; in addition to proposing 31 recommendations with focus on five areas, including:

²⁸ City of Madison, WI, “Task Force on Equity in Music and Entertainment,” accessed January 25, 2024, https://www.cityofmadison.com/dpced/planning/documents/Arts_112818_TFEME_Final%20Report.pdf.

²⁹ Ibid.

- Culture and Community
- Venues
- Equity of Access
- Public Safety and Media Coverage
- Transportation

Who Is Responsible: A result of 9 years’ worth of efforts by the hip-hop community in Madison, and 7 years as part of the official mission of the Urban Community Arts Network (a local organization ‘dedicated to supporting sustainability in the Madison music community and advocating for equity in the local arts and entertainment ecosystem’),³⁰ the Task Force on Equity in Music and Entertainment was convened in June 2017 after unanimous approval by the City of Madison Common Council and held its first meeting in September later that year. As per the resolution submitted for its convening, the task force comprised 11 members representing different sectors of the city and community, including musicians, college students, entertainment promoters, and policymakers.

In the 9 years prior to establishing this Task Force, citizens of Madison had already begun to assemble government and private entities, including the Madison Police Department, the Office of the Mayor, the Alcohol License and Review Committee (ALRC), the Madison Arts Commission (MAC), the Division of Civil Rights, and owners of music venues, to explore how Madison’s music and entertainment scene could be made to become more inclusive.

Upon its establishment, the task force had four main aims:³¹

- Identification of the root causes of issues that may detract from equal access to entertainment by all residents and guests including transportation and public perception of safety concerns
- Explore best practices used in other communities, especially those that are home to large populations of college students, young professionals, residents who are active in urban arts that can be adapted to [Madison’s] downtown
- Recommend long-term and short-term strategies to establish an atmosphere of continued communication, which will assure the sustainability of the desired environment and benefits

³⁰ Urban Community Arts Network, “Home,” [ucanmadison.com](https://www.ucanmadison.org/), accessed January 25, 2024, <https://www.ucanmadison.org/>.

³¹ City of Madison, WI, “Task Force on Equity in Music and Entertainment,” accessed January 25, 2024, https://www.cityofmadison.com/dpced/planning/documents/Arts_112818_TFEME_Final%20Report.pdf.

- Analysis of costs, revenues, and timelines that will support both short term and long term recommendations

As of 2019, this task force is no longer active as it was originally instituted to specifically develop the Equity in Music and Entertainment Report. However, several work groups which focus on areas such as economic impact and tourism have since been established to start the process of implementing the recommendations set out by the report, with more changes expecting to be put in place in 2024.

What It Has Done: This report has informed the creation of other related reports, such as Sound Diplomacy's Music Recovery Framework for the Greater Madison Music City Project. As of August 2022, the city has begun to implement the recommendations set out in the Equity in Music and Entertainment report, including:

- Formalizing plans for a full-time staff position at the Mayor's office focused exclusively on promoting equity in arts and entertainment
- Creating the Equal Opportunities Commission Certified Partners training to ensure that equity is maintained in all music and entertainment events
- Working on an ordinance to add an Affirmative Action Plan to the entertainment license application process
- Implementing grants or sliding-scale fees for arts events that require permits

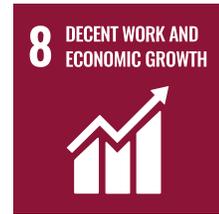
As of March 2023, the City Department of Civil Rights is also currently developing anti-bias, bi-cultural, and cross-cultural training for all music venues. More generally, as a result of the establishment of both the task force and the report, awareness of these underlying racial issues has also increased, leading to an increase in bookings made at Black-owned venues as well as support for hip-hop artists.³²

Relevance for Delaware: The result of collaborative efforts on a local level, this example demonstrates the benefits of working groups and task forces with significant political and social will. Though the Task Force outlined here focused on a highly specific local issue, the systems of inequity and discrimination it sought to tackle are systemic to North American culture and a similarly focused and cooperative approach to the diversity issues facing Delaware is much needed and can provide a basis through which to begin tackling a range of challenges within the state's creative economy.

³² Karen Reece, in discussion with Sound Diplomacy, April 19, 2023.

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.



SUSTAINABLE DEVELOPMENT GOAL 17: Strengthen the Means of Implementation and Revitalize the Global Partnership for Sustainable Development.

- Target 17.17: Encourage and promote effective public, public-private and civil society partnerships, building on the experience and resourcing strategies of partnerships.



3.1.1.2. Recommendation 2: Establish Creative Hubs in Each County

Action

Supporting Stakeholders: Delaware Division of the Arts, State of Delaware, Town/City and County Councils, Proposed Task Force and working groups, University of Delaware, Delaware State University, Delaware Prosperity Partnership

Goals:

- Address topics related to DEA&I
- Tackle issues related to geographic inequality
- Foster cross-sector collaboration and interdisciplinary dialogues
- Expand opportunities for professional development
- Stimulate economic activity

Timeframe: Long term (48 months +)

Description: The DDOA, County Councils and State of Delaware should work together to establish creative hubs in New Castle, Kent, and Sussex counties. Creative hubs are physical spaces which play a crucial role in fostering innovation, entrepreneurship, and professional development, incubating creative ventures, and the overall development of the creative economy. This takes place through:

- Shared spaces such as workspaces, studios, and facilities where creatives can work individually or collaboratively.
- Events, workshops, and meetups that bring members of the creative community together.
- Access to resources such as equipment, technology, mentorship, funding opportunities, and business support services.
- Events, exhibitions, and performances that showcase the work of the users/members and contribute to the area's cultural diversity.
- Support for creative entrepreneurs, helping them navigate the business side of the creative industries, such as through legal and marketing advice.

Creative hubs serve as collaborative environments where creative professionals can work, share ideas, collaborate on projects, and access resources. Hubs should be accessible to a broad range of people and help make the creative economy more equitable. In the context of Delaware, creative hubs could become the location where the proposed working groups can meet (see [Recommendation 1](#)), and bolster any efforts undertaken by them and the Task Force. The asset map can serve as a valuable resource in identifying appropriate locations of hubs of creative activity.

Creative hubs can be State-supported, fully private, or run via public/private partnership. In terms of a partnership approach, the State or local government could support through the provision of an empty building or rooms for free or a nominal fee, while a Board is appointed to manage the space. Creative hubs can generate income via membership fees, one-off fees for the use of materials and tools, event ticketing, space rentals, sponsorships, etc.

Diversity, Equity, Accessibility & Inclusion Imperatives:

- A creative hub should be accessible to all members of the community and should be proactive in attracting a cross-section of society.
 - For example, people from low income backgrounds should be offered discounted membership, some events and workshops should be free and covering topics requested by members if underrepresented communities, there should be free-to-access space within the hub, and guidance on expectations regarding

women’s safety, amongst other topics, should be provided. The hub should make a concerted effort to highlight and support the work of BIPOC, Queer, and disabled artists.

Regional Considerations:

- In preparation for realizing this recommendation in the future, the proposed Task Force should lead a project that assesses regional needs, identifies potential locations, analyzes different business models, and approaches potential partners and sponsors.
- By increasing access and opportunity to currently underserved communities, a creative hub will increase awareness of and value in the creative industries and arts in the city or town it is based in. It integrates the creative industries and arts into peoples’ lives on a long term basis.
- Special attention should be paid to improving the accessibility of rehearsal spaces in the south of the state.

Benchmark: REC Philly, US³³

What It Is: REC is a 10,000 square foot creative space located in Philadelphia, containing workstations and professional equipment for a range of practices. As well as being a physical space, REC also creates networking opportunities for its members (who pay yearly or monthly subscription fees) and shares job opportunities. In addition, REC provides resources that help creatives learn what they need to do in order to make their work sustainable and profitable. The project was a natural progression from its co-founders’ previous efforts bringing the city’s creatives together. The internal team also composes a creative agency that can service regional and national companies when it comes to art direction, marketing, etc. It is due to open a Miami operation in 2024. Membership costs \$99 per month which also gives access to the space and events.

Who Is Responsible: There is a full time core team of around 14 people, looking after members, projects and events, marketing, the space itself, etc.

What It Has Done: A post-lockdown REC Relief project distributed grant money and sponsored REC Philly memberships to creators. In their first round, they raised \$20,000 in funding from local businesses to give out 50 microgrants and more than 40 free REC

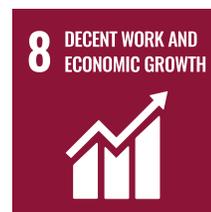
³³ REC Philly, “Homepage,” accessed May 4, 2023, <https://recphilly.com>.

Philly memberships.³⁴ In addition to the REC Relief program, REC Philly has worked with WXPB and WRTI to launch their Black Music City grants, which provide funds to Black creatives in Pennsylvania, Delaware and New Jersey who are working on projects that honor Philly's Black music history.³⁵ It has hosted events at SXSW in Texas, and has partnered with Live Nation Urban to find grassroots artists to perform at The Roots Picnic festival in Los Angeles in 2024. It currently advertises itself as having over 1,000 members from across disciplines.

Relevance for Delaware: Delaware needs to bring people together so that the grassroots creative scene can blossom. Inspired by the expansion that REC Philly is currently undertaking, and the opportunities at the national level it has generated for local creatives, Delaware should be looking to institute a physical space that cultivates regional talent and gives people affordable access to top tier equipment and opportunities. REC Philly is a key example of how a membership-based business model can be utilized to raise funds to sustain the spaces, cultivating a sense of community, and attract members in order to get access to the events and networking opportunities it hosts.

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.2: Achieve higher levels of economic productivity through diversification, technological upgrading and innovation, including through a focus on high-value added and labor-intensive sectors.
- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.



³⁴ REC Philly, "REC Philly Reopens Doors At 9th & Market," August 10, 2020, <https://www.joinrec.com/blog/rec-philly-reopens-doors-at-9th-market>.

³⁵ Kim Winnick, "Black Music City is Offering \$125,000 In Grants to 30 Philadelphia-Area Black Creatives," November 16, 2023, <https://xpn.org/2023/11/16/black-music-city-is-offering-125000-in-grants-to-30-philadelphia-area-black-creatives/>.

SUSTAINABLE DEVELOPMENT GOAL 9: Build Resilient Infrastructure, Promote Inclusive and Sustainable Industrialization and Foster Innovation

- Target 9.1: Develop quality, reliable, sustainable and resilient infrastructure, including regional and transborder infrastructure, to support economic development and human well-being, with a focus on affordable and equitable access for all.



SUSTAINABLE DEVELOPMENT GOAL 10: Reduce Inequality Within and Among Countries

- Target 10.2: By 2030, empower and promote the social, economic and political inclusion of all, irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status.



3.1.1.3. Recommendation 3: Update Special Event and Performance-Related Permits and Licenses at the State, County, and City Level

Policy

Supporting Stakeholders: New Castle County, Sussex County, Kent County, Town and City councils, Cities and Towns' Offices of Cultural Affairs, Police and Fire Departments, Delaware Alcoholic Beverage Control Commissioner

Goals:

- Stimulate economic activity
- Improve governance and strategic thinking
- Increase transparency and accountability
- Create opportunities for a richer tourism offering

Timeframe: Medium term (24-48 months)

Description: For Delaware’s creative ecosystem to grow, it is imperative for the State and its subdivisions to implement a renewed policy framework related to the night time economy and the performance & celebration sector.

Sound Diplomacy has identified 6 regulatory topics that require attention throughout the state. In very few cases, these topics are already covered by a regional ordinance (as is the case with busking in Wilmington), but in general each needs to be revisited at the statewide, county and city/town level.

In the following table (see Table 9) we list the regulatory topics that need to be addressed and their benchmark case studies.

Table 9. Description of Licensing and Regulation Topics Related to the Performance Sector

TOPIC	ABOUT	BENCHMARK
Liquor Licenses	Accessible liquor licensing is essential for hosting events that feature music or performances and which are seeking to make an income. Liquor licensing information should be easily accessible and clear, and provide achievable requirements that an applicant can follow and be judged objectively on. Licenses should be made available for both for-profit and nonprofit events.	<p>Lafayette’s Liquor Licensing, Louisiana³⁶</p> <p>Lafayette’s Consolidated Government website has a specific section for alcohol and noise control under the Community Development & Planning Department. This section clearly explains the requirements and attaches the forms for alcoholic beverage permits, special event permits, sound variance permits, and bar cards. The website makes it clear that in order to obtain an alcoholic beverage permit applicants must submit their information to Lafayette to obtain a local license, and then apply for a state license afterward. The local government simplifies the information offered on the website and provides clear instructions for applicants. Having only a handful of categories to choose from also facilitates applicants to choose the right license for their needs.</p>

³⁶ Lafayette Consolidated Government. “Alcohol and Noise Control”, accessed January 15, 2023, <https://lafayettela.gov/DP/anc/default>.

<p>Sound Ordinances</p>	<p>At the present time, Delaware tends to only account for “Noise” in its regulations, the type usually created by industrial work such as construction. Sound Ordinances are important because they are designed especially for amplified music and sounds, and give event promoters and venue owners an objective guide to follow when hosting live music and other types of performances.</p> <p>Sound Ordinances include subtleties such as a difference in sound levels for the day and the evening, weekdays and weekend, for example. In addition, a special event permit could allow for an event to exceed the standard limitations in specific circumstances. They should be made available for both for-profit and nonprofit events.</p>	<p>Austin Noise ordinances, Texas³⁷</p> <p>Austin’s noise and sound ordinances have been developed to generate an active relationship between residents and businesses, creating distinctions between them and generating custom event permits based on the location. Austin introduced the concept of a "Sound Impact Plan," which serves as a tool to regulate entertainment-related sound in venues, improve sound quality within the venue, minimize sound disturbances outside, promote communication and problem-solving, and strike a balance between live music, nightlife, and the quality of life for residents.</p>
<p>Special Event Permitting</p>	<p>Special event permits are specifically for events taking place over a day or over a handful of days. They can be recurring yearly, biannually, or less often. Special events is a broad category, encompassing local community daytime events to weekend music festivals. What is important is that guidelines and requirements are clear and can be applied without discriminating against promoters or audiences that adhere to the guidelines.</p>	<p>Austin event permits, Texas³⁸</p> <p>The Austin Center for Events (ACE) is a collaborative of City departments designed to streamline special event permitting on public and private property. ACE is anchored by teams from Transportation, Parks, Music, Police, Fire, EMS, Code, ARR, Development Services and partner agencies, and works closely with event organizers to guide them through the permitting process.</p>
<p>All Ages Ordinances</p>	<p>All ages permits are specifically about ensuring that venues with a permanent liquor license can host events that allow under-21 attendance. These ordinances are usually designed with safety measures in place to make sure that under 21s are not able to purchase alcohol. Such an ordinance is particularly useful to contexts where adults may want to attend events and performances with children and extended family.</p>	<p>All Ages events licenses in Milwaukee, WI³⁹</p> <p>The city introduced less restrictive codes which allowed venues to present all-ages shows while still serving alcohol to guests 21+. Under the terms of these new codes, approved in 2019, venues are required to have a ‘designated performance space’ and cannot sell liquor in the two hours immediately preceding and following the performance. They need to submit health and safety plans, but they are also now required</p>

³⁷ Austin Texas, “Noise and Amplified Sound Enforcement,” accessed January 12, 2024, <https://www.austintexas.gov/page/noise-and-amplified-sound-enforcement>.

³⁸ Austin Center for Events, "Welcome to the Austin Center for Events," accessed January 12, 2023, <https://www.austintexas.gov/ace>.

³⁹ Milwaukee, “Chapter 90 Liquor and Tavern Regulations, section 90-37. Centers for the Visual and Performing Arts. 1.” City.milwaukee.gov, accessed May 9, 2023, <https://city.milwaukee.gov/ImageLibrary/Groups/ccClerk/Ordinances/Volume-1/CH90.pdf> accessed 31-03-2023.

		to submit strategies for regulating who is purchasing and consuming alcohol and providing control staff. Additional fees are instituted in accordance with the venue's capacity, starting at \$150 for capacities under 25 and \$2,000 for capacities over 500.
Busking Guidelines	<p>Encouraging busking can be a part of broader efforts to increase footfall and engagement with downtown areas. It is important that busking guidelines are clear, easily accessible, and that they are informed by local residents and businesses.</p> <p>It is typical that busking guidelines give limits based on days, hours, time of the year, etc., to buskers. Increasing busking can be a great way to brand a town as more music friendly and creative.</p>	<p>Asheville Street Performers guidelines, North Carolina⁴⁰</p> <p>Created by the Asheville Buskers Collective, this guide gives any busker or potential busker the do's and don'ts of busking in the city of Asheville. The guide includes how to avoid trouble, what constitutes a noise disturbance, and busking etiquette i.e. how long you can play in one spot, cleanliness, leaving enough space for pedestrians to go by, not playing repetitive songs and keeping the volume at a reasonable level.</p>
Agent of Change	<p>Agent of Change is a relatively new policy idea related to urban development. In short, it protects existing businesses, especially those that generate sound, such as music venues, from any potential noise complaints from future neighbors. It puts the onus on property developers to ensure that new builds are properly soundproofed and it protects venues from future noise complaints from local residents, as long as they are following the sound ordinance guidelines. This Agent of Change principle has been used in many cities to protect cultural heritage.</p>	<p>Agent of Change in Victoria, Australia⁴¹</p> <p>Agent of Change was adopted by following large scale public movements regarding the threat that live music and evening entertainment were facing in the city. The principle requires a developer to include noise attenuation measures when a proposed residential development is within 50m of an existing live music performance venue. In practical terms, this means that a new residential planning proposal close to a live music venue will need to include appropriate noise attenuation measures.</p>

Implementation Considerations:

- Using the regulatory assessment and local experiences, identify which permits and licenses need to be updated.

⁴⁰ Asheville Buskers Collective ("The Asheville Buskers Guide," 2019, <http://avlbuskers.com/wp-content/uploads/2017/02/ashevillebuskingguide2017.pdf>).

⁴¹ Music Victoria, "How To: Agent of Change," accessed January 12, 2024, <https://www.musicvictoria.com.au/resource/how-to-agent-of-change>.

- It is recommended that liquor licensing is evaluated and updated first at the state level. For the regions, a renovation of the whole framework could be initiated at once, inspired by something such as New South Wales’ “Vibrancy Reforms,” in which various policies related to different aspects of the night time economy in that part of Australia have been adopted as part of an economic development strategy.⁴²
- Draft policy proposals based on the provided benchmarks and further examples.
- Working with key stakeholders, build a strong message around policy proposals and their purpose.
- Identify legislators at the State and regional levels who are most amenable to policy proposals and growing the creative economy.
 - Sussex County’s recent efforts to streamline and digitize its special events permits should be celebrated and used as the basis of statewide improvements.
- Utilize the proposed working groups and Task Force (see [Recommendation 1](#)) to garner support from the creative economy as a whole for renewed legislation.
- Create materials such as podcasts, articles, and social media posts explaining what an improved night time economy and expanded performance & celebration sector could do for the state, with a special focus on the economic benefits it could yield.
 - Promote these materials to local media outlets.
 - Encourage stakeholders to contact their representatives about this topic.
 - Continue making the case for improved legislation around this topic to legislators at every opportunity.
 - Distribute information at events throughout the state to keep the general public engaged.
- For many of the proposals, each county and city/town will need to implement their own updated permit and licensing policies. This will involve regional councils being lobbied, encouraged, and supported in adopting such changes.
 - Wherever possible, there should be alignment across the state regarding regulations.
- **Diversity, Equity, Accessibility & Inclusion Imperatives:**
 - In order to avoid discriminatory practices when it comes to granting licenses and permits, ensure that the assessment process is transparent and objectively applied.
- **Regional Considerations:**
 - Based on the findings from the regulatory assessment, Table 10 shows the regulations and licenses recommended for urgent consideration in each location.

Table 10. Regulations to Address, Per Region

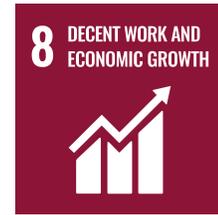
⁴² NSW Government, “Vibrancy Reforms,” accessed December 18, 2023, <https://www.nsw.gov.au/business-and-economy/24-hour-economy/vibrancy-reforms>.

STATEWIDE	COUNTY	CITY/TOWN
Delaware (statewide) <ul style="list-style-type: none"> Liquor licensing 	New Castle County <ul style="list-style-type: none"> Sound Ordinance Event Permits All Ages Ordinances Kent County <ul style="list-style-type: none"> Sound Ordinance Event Permits All Ages Ordinances Sussex County <ul style="list-style-type: none"> Sound Ordinance Event Permits All Ages Ordinances 	Wilmington <ul style="list-style-type: none"> Sound Ordinance All Ages Ordinances Agent of Change Middletown <ul style="list-style-type: none"> Sound Ordinance Event Permits All Ages Ordinances Agent of Change Busking Dover & Smyrna <ul style="list-style-type: none"> Sound Ordinance Event Permits All Ages Ordinances Agent of Change Milford & Georgetown <ul style="list-style-type: none"> Sound Ordinance Busking All Ages Ordinances Agent of Change

Further Considerations:

- As a longer term project, the stakeholders involved with this recommendation will investigate zoning and permitting laws which need to be implemented in order to foster entertainment districts in cities and towns throughout the state. This will involve looking at sound ordinances, special license processes for summer events, alternative liquor licenses for said events, etc.

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All



- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.
- Target 8.9: By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products.

3.1.1.4. Recommendation 4: Develop a Statewide Digital “One-Stop Shop” for Permits and Licenses

Action

Supporting Stakeholders: The Delaware Office of the Alcoholic Beverage Commissioner, all County and City/Town councils, and their Departments/Staff focused on licensing, Police and Fire Departments, Professionals within the creative economy (especially those in the performance & celebration sector)

Goals:

- Increase transparency and accountability
- Raise awareness of the creative economy and share knowledge across creative sectors
- Stimulate economic activity

Timeframe: Medium term (24-48 months)

Description: In partnership with supporting stakeholders, the State should build and implement a digital One-Stop Shop for special event licenses and permits. A One-Stop Shop is a digital platform that centralizes all relevant information regarding the creative economy, including regulations, funding opportunities, calendars, databases, and professionalization programs. This platform would have to be applicable across the state and for different counties and towns/cities, and should be easily accessible to all members and agents of the creative ecosystem within and

without Delaware. Making licensing and permitting processes more uniform and objective will lessen the degree to which personal preferences and attitudes result in discriminatory outcomes.

Following on from [Recommendation 3](#), to begin, Delaware's One Stop Shop should be focused on easing access to permit and license applications related to special events. It should assist with:

- Comprehensive permitting and licensing information.
- Easy access to applying for said permits (special events; filming).
- Easy access to applying for licenses (e.g. liquor licenses).
- Updated information on the status of requests.

Implementation Considerations:

- Take as a starting point the efforts that Sussex County has made to streamline and digitize its permit application processes.
- The One-Stop Shop would need to be owned by the State and managed on a day-to-day basis, such as by the Delaware Office of the Alcoholic Beverage Commissioner, to make sure it is up to date and functional.
 - It would need to be easily found via the State's website and should also be listed on the websites of the regional councils.
- The platform would need to be divisible by sector and county, with additional relevant sections specifically for sectors such as Film & New Media (see [Recommendation 8](#)) where a database of filming locations and available tax credits would be listed.
- Run a user experience test on the existing system and processes to understand where people might struggle, and identify areas for improvement and streamlining.
- Leverage the information covered in Sound Diplomacy's regulatory assessment and [Recommendation 3](#), and collaborate with public agencies and licensing departments to feature all the regulations and licenses that apply to the creative economy.
- Create application guides which act as "walkthrough" documents for different types of application processes.
- Embed DelawareScene into the platform as well as Sound Diplomacy's asset map, so that the One-Stop Shop also works as a port for a full index of the state's creative economy assets.
- Create an online platform with direct application links. All application forms and payments should be accessible online; they should be able to be completed online as well.
- All permitting information and fees should be introduced upfront or on an additional page so that they can be seen before completing an application.

- The [Sustainable Environment Education Series \(SEEDS\) Green Production Guide](#) (or similar) should be linked to the One Stop Shop to ensure sustainability is embedded in all future planning.⁴³
- Include a sign up account that remembers current and past events and applications so that applications can be left and returned to and licenses can be easily renewed.
- Prepare a rolling marketing campaign (inclusive of social media and newsletters) to ensure that everyone is aware of the One-Stop Shop's existence.
- **Diversity, Equity, Accessibility & Inclusion Imperatives:**
 - Opaque permit and licensing procedures are rife with discriminatory practices, and our research found mention of event permits being rejected or delayed because of thinly-veiled bigotry. For these reasons, the One-Stop Shop should present a process that is as objective as possible with an active design that prevents these sorts of practices.
 - Make sure that key documents are available in Spanish, and also that the digital platform is also available in Spanish, to accommodate for rising bilingualism.

Further Considerations:

- As the platform matures, a medium term goal should be to merge the One-Stop Shop with DelawareScene (see [Recommendation 25](#)).

Benchmark: Miami's Special Filming & Events Permit One-Stop Shop, US⁴⁴

What It Is: The City of Miami's Office of Film & Entertainment offers a One-Stop Shop for permitting, special events, government liaison, production information and referral sources. It states that its mission is to provide service and assistance to all film, television, music, commercial production and still photography businesses to promote industry expansion and economic prosperity

The online portal offers people the opportunity to apply for:

- A special events permit
- A temporary events permit
- A film permit

⁴³ Green Production Guide, "Green Production Guide Toolkit", accessed January 12, 2024, <https://greenproductionguide.com/tools/>.

⁴⁴ City of Miami, "Filming and Events," accessed January 9, 2024, <https://www.miami.gov/Permits-Construction/Filming-and-Events>.

It also gives visitors access to the special events calendar, and provides some examples of film locations throughout the city.

Each online portal for a permit application lays out the process clearly. The page for a special events permit, for example,⁴⁵ provides deadlines for events around key dates, and even clarifies who should be applying for this type of license, and what other types there are (such as licenses relevant to events taking place in a state or city park, for example). In addition, it takes applicants through the process step-by-step:

1. A review of rules, bylaws, and some fees associated with special events, including aspects specific to certain zones and neighborhoods.
2. An overview of all the documents an applicant needs to provide and complete ahead of submitting the application for the permit.
 - a. This includes a site plan, business tax receipt (if it is a for-profit organization), insurance and indemnity documents, and a life safety plan.
 - b. Potential additional documentation includes a valid liquor license, a fire safety permit, a building permit, and additional police clearance.
3. A link to a fully digitized application submission site where people can upload their documents.
4. A link to pay a \$50 processing fee to the City.
5. Information about how representatives from the City will keep in contact with an applicant once the files have been submitted, and how additional information and corrections will be supplied.
6. Information regarding the final steps: paying the final invoice and receiving the permit.

Who Is Responsible: The City of Miami's Office of Film & Entertainment.

What It Has Done: Miami does not share information about the amount of people who apply for permits on a yearly basis. However, at the time of writing, the special events calendar is well populated for the next three months and there are at least two events per month during the upcoming six months.⁴⁶ Special events attract tourists and stimulate economic activity; in 2023, Miami's Convention & Visitors Bureau reported that the previous year Greater Miami and Miami Beach attracted 26.5 million visitors,

⁴⁵ City of Miami, "Get a Special Events Permit," accessed January 9, 2024, <https://www.miami.gov/Permits-Construction/Filming-and-Events/Get-a-Special-Events-Permit>.

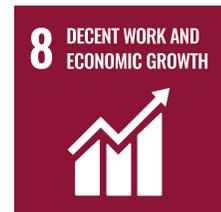
⁴⁶ City of Miami, "Miami Special Events Calendar," accessed January 5, 2024, <https://www.miami.gov/Permits-Construction/Filming-and-Events/Miami-Special-Events-Calendar>.

increased spending from 2021 by 8%, and increased hotel guests from the year before by 12.7%.⁴⁷

Relevance For Delaware: Miami provides an example of how a One-Stop Shop can simplify processes to apply for special event or filming permits. It's an example of how a simple website can be a home for all the relevant information for promoters and events organizers, and how it is applicable to both for- and nonprofit organizations and individuals. Miami also provided visitors with a list of key dates so that they know when events will coincide with city-wide events and occasions.

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.

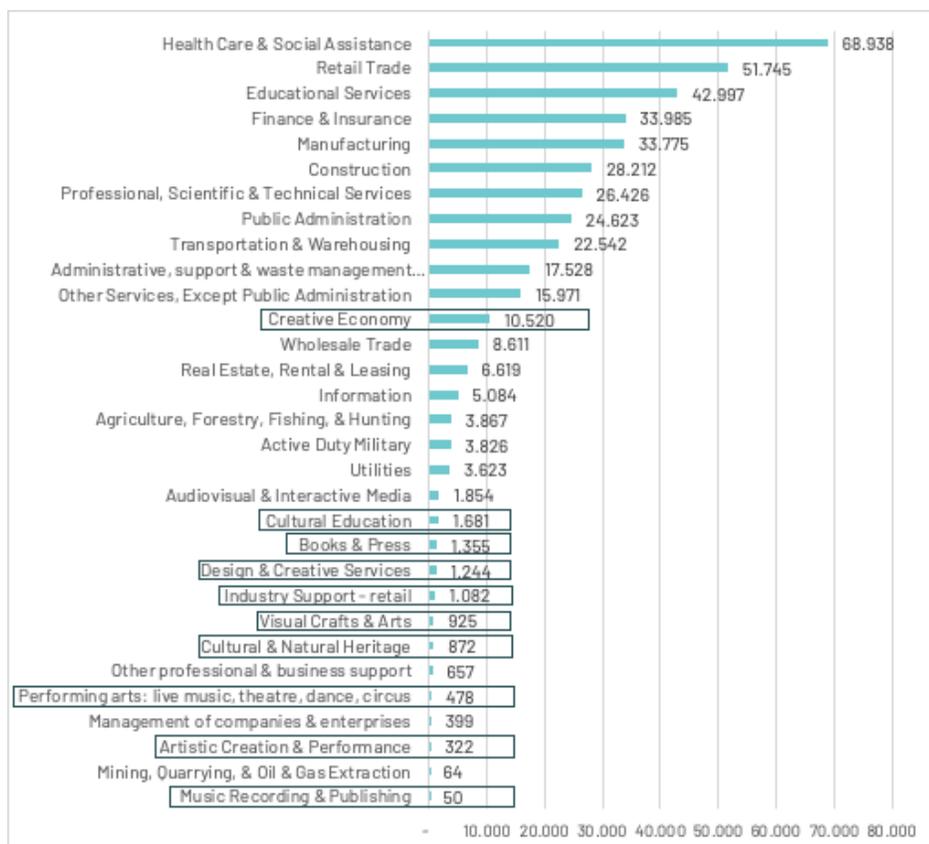


3.1.2. Industry Support

The creative economy in Delaware is a significant employer in the state, exceeding Wholesale Trade, Real Estate, Information, and many other sectors:

⁴⁷ Greater Miami Convention & Visitors Bureau, "Greater Miami Convention & Visitors Bureau (GMCVB) Celebrates Unmatched Visitor Growth and Economic Impact in 2022," May 11, 2023, <https://www.miamiandbeaches.com/press-and-media/miami-press-releases/growth-and-economic-impact>.

Figure 16. Direct Employment by Industry, Delaware, Economic Impact Assessment



Despite this contribution supporting the workforce of Delaware, Sound Diplomacy’s economic impact assessment, mapping, and survey analysis reveal problem points related to industry

support, particularly as it pertains to business support and compensation. One of the related creative sectors studied in the mapping, “Other professional & business support” has a much lower prevalence than other sectors in the state’s creative economy, accounting for only 1% of the total. This may be connected to the decline in the creative economy’s GVA values due to COVID in 2020, with this sector rebounding slower than the rest of the creative economy.

Delaware’s creative economy boasts a comparatively higher average income compared to other sectors in the state. Nonetheless, comparing the composition of the creative economy workforce with any noted income disparities reveals some sharp contrasts. The creative economy sector is made up of 35% women (compared to 49.4% in Delaware’s economy overall), indicating a gender bias that is exacerbated by a pay gap in which men earn, on average, 39.9% more. Additionally, the workforce is predominantly white at 72.3% (compared to 68% of the total state population), while Black/African-American workers account for only 12.3% (compared to 23.8% of the total state population).⁴⁸ This reveals a lack of representation of the larger population of Delaware, an issue that is again exacerbated by a significant racial wealth divide in the state, where white individuals earn an average of \$73,920 a year and Black individuals and Other ethnicities earn an average of \$60,231 and \$53,748, respectively.⁴⁹

Dissatisfaction with income and compensation is a pervasive issue across the creative economy. While an average of 64% of creatives derive their income from sources related to creative work, a significant 83% of surveyed creatives and 78% of creative organizations expressed dissatisfaction with pay in our survey analysis, noting that this is currently insufficient to meet basic needs. These results are consistent with the perception that accessing financing, both public and private, is a challenge to the success of creatives in the state, and underscores a need for more private/public partnerships.

Income disparities in the creative economy vary significantly by sector. Overall, average income in the creative economy is 29% higher than the rest of the economy overall. Though some sectors, such as Design & Creative Services and Audiovisual & Interactive Media, benefit from higher-than-average incomes, others, such as Artistic Creation & Performance and the Performing Arts are languishing far behind. Though it is normal for the culture industries to produce such a dynamic income spectrum, policymakers and stakeholders must consider these lower ends of the spectrum in order to bolster an equitable and equally-paid creative economy.

Self-Employment & Small Businesses

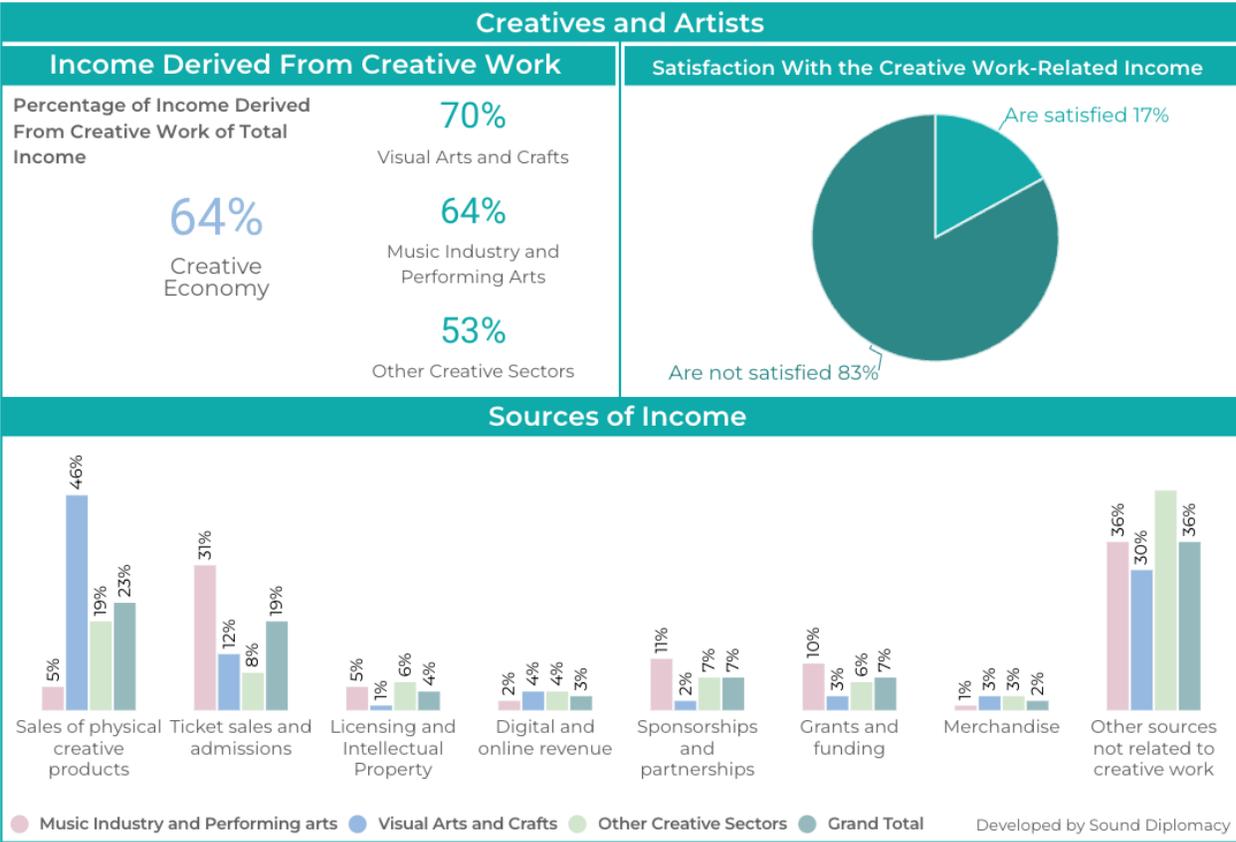
⁴⁸ United States Census Bureau, “QuickFacts Delaware,” accessed January 12, 2023, <https://www.census.gov/quickfacts/fact/table/DE/PST045222>.

⁴⁹ Prosperity Now, “Racial Wealth Divide in Wilmington,” (Washington, DC., March, 2019), 1-16. *Not available online.*

Much of the dissatisfaction and vulnerability surrounding compensation is tied to the fact that 17.8% of the creative economy is made up of self-employed people who do not operate as an incorporated business, compared with 8.5% of the larger economy. As freelancers assume higher risks and costs⁵⁰ related to creative production, exhibition, and distribution compared to employees, this represents a significant point of vulnerability.

Beyond self-employment, Sound Diplomacy’s assessment of establishment sizes in the creative economy shows a higher-than-average existence of small businesses in the creative economy, which account for 70.7% of businesses in the sector. While these figures suggest a strong entrepreneurial spirit in the state, they also point to the need for more protections for an industry less capable of weathering economic change.

Figure 17. Creatives: Professionalization and Income by Sector, Survey Data



⁵⁰ E.g. Insurance, social security, material costs etc.

Relationships with Business and Economic Development Organizations

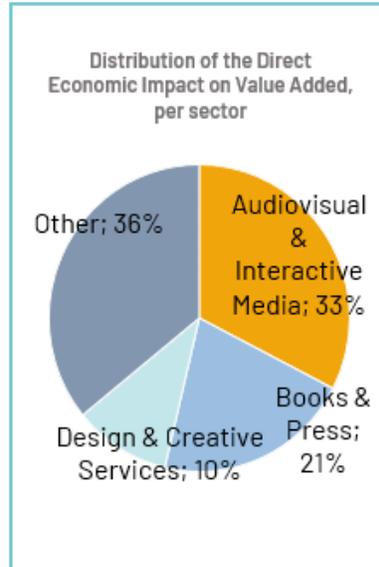
Despite a markedly “pro-business” economic climate in Delaware, the creative industries could be supported as well as more “traditional” industries. The Delaware Prosperity Partnerships, for example, lists the state’s key industries as Manufacturing & Logistics, Business & Financial Services, Science & Technology, Education & Healthcare, and Food & Agriculture.⁵¹ It is worth noting that some inroads have been made recently, with the Delaware Division of the Arts launching an Artist Career Development (ACD) pilot program. This program provides two-years of sustained career support for emerging or mid-career Delaware artists, and selects an artist from each county. Stakeholders shared that the Delaware Division of Small Business’ Encouraging Development, Growth, and Expansion (EDGE) grants have been awarded to creative businesses but that the distribution of these grants have been less than diverse and equitable. Further integration with the business community and specific programs and opportunities prioritizing small, creative businesses are needed.

Audiovisual & Interactive Media

Audiovisual and Interactive Media contributes significantly as the primary driver of Delaware’s creative economy, accounting for 32.6% of the state’s total GVA where it is particularly robust in Dover, Middletown, and Wilmington. The sector comprises 11% of the state’s total ecosystem assets, but possesses the highest direct output and employment generated. The sector’s direct output of \$851.9 million accounts for 31% of the creative ecosystem’s total, and employs 1,854 individuals (18% of direct employment in the ecosystem). Our economic research found that the AV sector has a high Location Quotient (LQ) of 1.81 but a low employment LQ of 0.54, signaling that the state has a higher number of businesses in this sector compared to the national average, but a lower number of employees per business, meaning that the businesses tend to be relatively small. The footprint of the sector, coupled with its small business size, indicate that the sector is in a period of growth and would benefit from additional funding to become more resilient and sustain said growth.

Figure 18. Distribution of the Direct Economic Impact on Value Added, per sector

⁵¹ Delaware Prosperity Partnership, “Key Industries,” accessed January 9, 2024, <https://www.choosedelaware.com/key-industries/>.



Regulation & Funding

For such a significant sector that has majorly transformed the creative economy in other states (such as Georgia and New Jersey), the regulatory standard practices and taxation in Delaware’s film and television industry are lacking. The sector lacks industry standard permit practices, tax incentives, workforce development, and DE&I standards. While some stakeholders argued that this lack of policy results in a certain amount of freedom uncommon to well-developed film production hubs, Delaware’s audiovisual sector needs a clear regulatory environment and licensing structures in order to grow to its full potential.

House Bill 465, the Delaware Entertainment Job Act, devised in 2021/22, was designed to “encourage jobs creation, artistic endeavors and investment in the film, television, esports, and video game industry in the State of Delaware, and the attendant benefits for the economy and job growth” with a proposed 30% production tax credit.⁵² The bill failed to pass. Unlike the above-mentioned jurisdictions, Delaware does not presently have a comprehensive index or map of resources or important information for those working in film to utilize. Each of these issues speaks to an overall outdated view of the audiovisual sector in the state outlined by stakeholders. This is confirmed by an emphasis on traditional “motion picture” production when the sector includes major contributions from the related fields of advertising, radio, television, and digital media production and broadcasting.

Funding has been made available by the State to the Delaware Motion Picture and Television Development Commission, a public body, but stakeholders noted that the commission’s activities

⁵² Delaware General Assembly, “House Bill 465,” accessed January 12, 2024, <https://legis.delaware.gov/BillDetail/119633>.

are uncertain and that there is a lack of oversight concerning how funding has been allocated and spent by the Commission. There is therefore a need, as stakeholders have argued, for a fully operational film commission in the state that can foster local productions and attract larger runaway projects. There is some additional confusion between the role of the Commission (a public body) and Film Delaware, a private enterprise.

Diversity, Equity, and Inclusion in Audiovisual and Interactive Media

Stakeholders noted that the AV industry in Delaware has been less than inclusive, with existing grants going to well-established individuals and entities, over new and diverse media makers. Many such media makers described having to go out of state to Philadelphia or elsewhere to find community, audience, and support for their projects. Delaware benefits, however, from a number of organizations specifically committed to improving equity within the AV industry whilst shoring up the sector. Reel Families for Change (RFC), for example, is “dedicated to generating meaningful and effective solutions for working families in the American screen industries,” and they strive to spotlight “those who have been traditionally underserved, overlooked, and silenced in the entertainment industry.”⁵³ Given RFC’s significant work in the sector to date, they should be prioritized as an essential partner in modernizing Delaware’s film and media policies.

Conclusion

Delaware’s creative industries provide a significant contribution to the state’s overall economy, but more governmental and business community support is needed. Though the creative economy’s emphasis on small and independent businesses speaks to a strong entrepreneurial spirit, significant disparities in income along sectoral, employment status, gender, and racial lines need to be addressed in order to produce a fully-realized creative ecosystem that the state can be proud to boast as one of its “key industries.”

Delaware is poised to grow a mature Audiovisual and Interactive Media sector, and it is already employing the majority of creatives in the state. Stakeholders note that the relatively small but topographically diverse geographical expanse of the state make it ideal for location shooting and film productions of various sizes. Nonetheless, the sector’s unclear permitting and regulatory environment is compounded by other challenges, such as a lack of professionalization and an underdeveloped education pipeline which makes competition with more developed states difficult. Addressing these issues will help to further foster the largest employer in Delaware’s creative ecosystem, and do so equitably.

⁵³ Reel Families For Change, “Homepage,” reelfamilies.org, accessed January 12, 2024, <https://reelfamilies.org/>.

3.1.2.1. Recommendation 5: Include the Creative Economy in Statewide Business and Economic Development Communications and Programs

Action

Supporting Stakeholders: The Division of Small Business, Delaware Prosperity Partnership, Delaware Department of Labor and the Workforce Development Board, the Chamber of Commerce, Regional Chambers, the Delaware Black Chamber of Commerce, Export Delaware, Delaware Small Business Development Center, the University of Delaware's Office of Economic Innovation and Partnerships.

Goals:

- Stimulate economic activity
- Improve governance and strategic thinking
- Raise awareness of the creative economy and share knowledge across creative sectors
- Foster cross-sector collaboration and interdisciplinary dialogues

Timeframe: Short term (1-24 months)

Description: Provide Chambers of Commerce, export departments, small business development departments, and decision makers in economic innovation and strategic partnerships with economic data and visual representation of the creative economy (via Sound Diplomacy's map), and embed this information and a renewed focus on the creative economy into economic development platforms and programs. This will highlight the value of the sector and contribute towards integrating the creative economy in state-wide economic development and business support.

Increase awareness of the impact of the creative economy, its workforce, and the value it adds to other industries in Delaware by promoting, to those listed above, the businesses and sub sectors that form it, the economic evidence demonstrating the impact on the regional economy, how workers and businesses within it can and should be supported, and potential export and cross-sectoral opportunities. Success in this area would see the following responses from agencies not directly linked to the creative economy:

- Highlighting the economic and social impact in marketing and business attraction strategies
- Placing the creative economy as a focal part of future economic development planning and strategies

- Including for-profit creative economy organizations in funding and investment opportunities
- Promoting the creative economy on state, county and city websites, literature and communications
- Giving the creative economy the same platform and amount of visibility as other industries (such as agriculture, manufacturing, finance and medicine)
- Developing workforce development partnerships between the creative economy and other sectors

The goal will be for the arts & cultural economy to stop being seen solely as an “add-on”, and understood instead as a core part of Delaware’s economy and culture. This messaging can draw on the overall brand and vision for Delaware’s creative economy (see [Recommendation 9](#)). Eventually, the aim will be to have the “Delaware Creative Economy” well understood as an important subsection of the larger economy and therefore eligible for programs and business funding and investment. By diversifying the pool from which financial, business development and marketing support can be drawn, Delaware can bridge the gap that currently exists in regards to financial and general support for for-profit organizations within the creative economy.

Implementation Considerations:

- Refer to the Choose Washington case study provided below to see how other states are integrating their creative economies and creative economy sectors into their economic development platforms and programs.
- Drawing on the economic data provided in this report, create the narrative that demonstrates how Delaware’s creative economy is already making a positive impact within the state.
- Identify communication and branding channels where creative economy sectors should be mentioned. This includes websites providing overviews of Delaware’s economic output and print publications that discuss Delaware’s economy and business community.
- Identify opportunities for the state’s creative economy to be represented at domestic business and economic development meet-ups, networking events and conferences.
- Identify opportunities for stakeholders within the creative economy to be included in Delaware export efforts.
- Current and future economic development funds and grants should be made accessible to creative economy sectors and the creative economy should be taken into consideration when tax credits, business grants etc. are devised.
- Stakeholders working on economic development should be encouraged to advocate alongside creative ecosystem stakeholders for the development of infrastructure that supports the creative economy, such as cultural hubs (see [Recommendation 2](#)).
- **Diversity, Equity, Accessibility & Inclusion Imperatives:**

- Creative economy business support should always be informed by the economic inequalities that exist in Delaware.
 - For example, BIPOC and women have historically been excluded from the benefits of economic growth, and continue to experience a lower quality of life than their white and male counterparts. Business support should uplift individuals and businesses from these demographics, and quotas should be put in place to ensure that support is meaningful.
- **Regional Considerations:**
 - Economic opportunities in Sussex and Kent counties should be given priority so as to address regional inequalities.
 - Any opportunities to build or refurbish physical infrastructure should be prioritized to take place in Sussex and Kent countries, so as to address the fact that many physical assets are concentrated in New Castle County.

Benchmark: Choose Washington: Creative Economy, US⁵⁴

What It Is: Choose Washington is Washington State’s economic development department. It has a webpage and an individual within the department dedicated to supporting and growing the creative economy.

The website states that “the Creative Economy is a hotbed for new ideas that can be prototyped, marketed and turned into ready revenue streams.” It also has a broad understanding of what constitutes the creative economy, noting that it includes roles such as sound designers, augmented reality landscape artists, 3D printing technologists and digital animators. In addition, the page provides an “industry snapshot” which explains the impact that the creative economy has in Washington state.

Choose Washington explains that its creative economy sector work is focused on five key initiatives:

1. Support pandemic recovery.
2. Connect the creative economy with other key industries.
3. Reenergize Washington’s film industry.
4. Connect Washington’s gaming industry.
5. Engage in long-range planning for the creative economy.

⁵⁴ Choose Washington, “Creative Economy,” accessed November 7, 2023, <http://choosewashingtonstate.com/why-washington/our-key-sectors/creative-economy/>.

Who Is Responsible: Washington State’s Department of Commerce and its Business, Investment & Visitor Attraction team.

What It Has Done: Recent press releases from the Department of Commerce have announced various high level, strategic support projects which will have an impact on the state’s creative economy. These include \$70 million dollars that was distributed, by the Department in collaboration with Washington State Arts Commission, as grants to 3,787 for-profit and nonprofit small businesses impacted by the pandemic.⁵⁵ The Department and Arts Commission also awarded an additional \$3 million to support community festivals and events also affected by the pandemic.⁵⁶

To support creative enterprises in Washington, the state has created The Creative Academy. Located on the MyStartup365.com website, the Academy provides a series of self-directed modules creatives can use to turn their passion into a business. A companion series helps would-be business owners with everything they need to know about Mastering Financials, from profit and loss statements to cash flow projections and tax reporting.

The Chamber is also seeking new ways to spur innovation across the state. This includes new workspaces to collaborate in, expanding broadband further into rural communities, increasing access to capital, and connecting those with an idea to those who can help it become realized, from manufacturers and engineers to marketers and export consultants. Its work is also focused on skill-building and developing the workforce of the future through career-connected learning, internships and apprenticeships in game design, software, filmmaking and 3D modeling.

Relevance for Delaware: Choose Washington’s Creative Economy project demonstrates how the creative economy can be celebrated and strategically supported by economic development bodies. By placing new media and experimental approaches at the heart of its story, it demonstrates that the state is a place of creative innovation and opportunities. It also presents an effective way to combine supporting regional talent and entrepreneurs with those outside of the state, creating nationwide opportunities for its creative economy community.

⁵⁵ Washington State Department of Commerce, “Latest Round of \$70 Million in State Pandemic Relief Assists 3,787 Small Businesses,” February 15, 2023,

<https://www.commerce.wa.gov/news/latest-round-of-70-million-in-state-pandemic-relief-assists-3787-small-businesses/>.

⁵⁶ Washington State Department of Commerce, “Keeping Summer Traditions Alive: Commerce, ArtsWA Award over \$3 Million to Support, Restart Community Festivals and Events,” July 18, 2023,

<https://www.commerce.wa.gov/news/keeping-summer-traditions-alive-commerce-artswa-award-over-3-million-to-support-restart-community-festivals-and-events/>.

SUSTAINABLE DEVELOPMENT GOAL 9: Build Resilient Infrastructure, Promote Inclusive and Sustainable Industrialization and Foster Innovation

- Target 9.3: Increase the access of small-scale industrial and other enterprises, in particular in developing countries, to financial services, including affordable credit, and their integration into value chains and markets.



SUSTAINABLE DEVELOPMENT GOAL 17: Strengthen the Means of Implementation and Revitalize the Global Partnership for Sustainable Development

- Target 17.14: Enhance policy coherence for sustainable development.
- Target 17.17: Encourage and promote effective public, public-private and civil society partnerships, building on the experience and resourcing strategies of partnerships.



3.1.2.2. Recommendation 6: Create a Full-time Government Position to Represent the Interests of the Creative Economy's Self-Employed and Small Businesses

Policy

Supporting Stakeholders: Division of Small Business, Department of Labor, Delaware Prosperity Partnership, Division of the Arts, Delaware Collective for the Creative Economy, Reel Families for Change

Goals:

- Stimulate economic activity
- Improve governance and strategic thinking
- Address topics related to DEA&I

- Raise awareness of the creative economy and share knowledge across creative sectors

Timeframe: Long term (48 months +)

Description: A Commissioner dedicated to representing the interests of the self-employed and small businesses at the state level can help to bring structural support to these types of workers and develop a sustainable workforce. Freelancers, self-employed, and sole proprietor businesses are critical and inherent to the creative economy, and the economy more generally. Professional artists, writers, managers, agents, marketing experts, etc., often work on a freelance basis for different clients. Their working situation means they do not have the same job security as someone with a full-time contract.

A Commissioner or someone similar would sit within an existing department, such as the Division of Small Business or Department of Labor, and would be tasked with representing the self-employed workforce in Delaware, collaborating with those in the state already tasked with supporting small businesses. Their portfolio will include them being a representative of agents within the creative economy in particular. Tasks would include:

- Regularly engaging stakeholders in the creative economy to discuss issues, concerns, successes etc.
- Leading ongoing research into the economic impact that Delaware's self-employed have upon the local economy.
 - Demonstrating to government bodies and the general public the economic impact that the self-employed have upon Delaware's economy, with a focus on those within the creative economy.
 - The asset map can serve as a tool to show interested parties the wide distribution of creative small-businesses.
- Proposing relevant and targeted tax relief programs and State government support schemes that would make self-employment in the creative economy more sustainable.
- Engaging with the proposed Task Force and working groups (see [Recommendation 1](#)) in order to be able to drive creative economy growth and support their grass roots efforts.
- Collaborate with the Film Commission to support the self-employed working in the Audiovisual sector.
 - The first task should be, as also mentioned in regional literature on the subject, ensuring that contracts for workers of various types, including set builders and stage technicians, are up to date.
- Work with stakeholders from across government to identify tax rebates that would benefit the self-employed working in the creative economy and stimulate economic activity and an increase in employment.
- Constantly advocate at the state level on behalf of Delaware's self-employed.

- Collaborate with national peers to create nationwide opportunities for Delaware’s self-employed and be part of national campaigns for supporting the self-employed.

The introduction of this position would require funds to be made available for the expansion of a suitable department/division, and the work requirements and KPIs should be set by State agents working within the Division of Small Business and Department of Labor, etc., informed by input gathered from the proposed Task Force and working groups.

Introducing this position would make Delaware a leader on this topic both nationally and internationally. Delaware-based and national advocacy groups and unions from across all the creative economy’s sectors, stakeholders and advocacy groups should advise on this topic as it pertains to Delaware and what would be possible to legislate for at a state level.

Diversity, Equity, Accessibility & Inclusion Imperatives:

- One of the key tasks given to any such position should be to investigate racial and gender discrimination in the self-employed segment of the economy, and, in collaboration with stakeholders, propose an action plan for addressing these issues.

Regional Considerations:

- This position should have a focus on researching the particular barriers that self-employed people in the south of the state face, such as transportation issues, broadband access, networking opportunities, etc.

Benchmark: ALCS Proposal for a Freelancer Commissioner, UK⁵⁷

What It Is: The UK’s Authors’ Licensing and Collecting Society (ALCS) notes that the creative industries contributed £109 billion to the UK economy in 2021 and, with 669,000 out of the 2.3 million jobs workers in these industries being self-employed, that freelancers make up a large proportion of these jobs. This runs at over twice the national average UK workers who are self-employed.

⁵⁷ Authors’ Licensing and Collecting Society, “Freelancer Commissioner,” accessed November 3, 2023, <https://www.alcs.co.uk/about-alcs/campaigning/freelancer-commissioner/>.

These freelancers consistently face challenges to having sustainable working lives. This includes:

- Lacking support from the government at times of crisis.
- Dealing with tax and benefit rules that do not take their working culture into account.
- Freelancers from minority backgrounds being particularly affected in times of crisis.
- A lack of educational and professional development support.

This is why, in 2023, the ACLS called on the government to establish a dedicated channel for engaging with the freelancer workforce through the appointment of a Freelancer Commissioner. It states that the Commissioner would represent not only freelance writers, but also visual artists, performers, directors and designers. It is proposed that the Freelancer Commissioner could sit within either the Department for Business, Energy and Industrial Strategy or the Department for Work and Pensions.

Who Is Responsible: The proposal is being led by the ACLS, which represents 120,000 members in the UK. Further support for the idea has been given by the Licensing and Collecting Society, the Design and Artists Copyright Society, film & TV industry advocacy group Creative UK, and the Creators' Rights Alliance.

What It Has Done: At the time of writing, the ACLS is campaigning for a Freelancer Commissioner to be put in place. In a meeting with government representatives in September 2023, stakeholders from across the creative industries reinforced the notion that a Freelancer Commissioner would play a vital role in supporting self-employed people working in multiple industries.⁵⁸

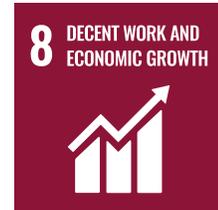
As part of the role, the Commissioner would be required to hold regular roundtables with different sectors, including the creative industries, with representatives from membership organizations and freelancers themselves. A Freelancer Commissioner would successfully plug the gap in knowledge currently held around self-employed work in the UK. This position would champion the vital role freelance, self-employed and atypical workers play across the creative and cultural sectors, while identifying and finding solutions to the systemic challenges that they face. A British MP has suggested that a freelance commissioner could look at building policy to secure shared parental leave for freelancers.

⁵⁸ Arts Professional, "Renewed calls for freelance commissioner," September 19, 2023, <https://www.artsprofessional.co.uk/news/renewed-calls-freelance-commissioner>.

Relevance for Delaware: Given that this is a novel idea, Delaware would need to be innovative to draw up proposals for such a persona that would be beneficial to the state's self-employed and creative economy. What it can learn from where the UK has got to so far, is that for such an idea to gain traction it will need to be seen as beneficial and gain support from key regional institutions and stakeholders from throughout the economy, and for this support to translate into partnering with empathetic legislators who can propose such a thing within government.

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.



SUSTAINABLE DEVELOPMENT GOAL 9: Build Resilient Infrastructure, Promote Inclusive and Sustainable Industrialization and Foster Innovation

- Target 9.3: Increase the access of small-scale industrial and other enterprises, in particular in developing countries, to financial services, including affordable credit, and their integration into value chains and markets.



3.1.2.3. Recommendation 7: Create Fair Pay Guidelines for Artists, Creatives and Professionals in the Creative Industries

Policy

Supporting Stakeholders: Delaware Division of the Arts, Proposed Task Force, Delaware Department of Labor, Reel Families for Change, Delaware Collective for Creative Economy

Goals:

- Address topics related to DEA&I
- Stimulate economic activity
- Expand opportunities for professional development

Timeframe: Short term (1-24 months)

Description: The Division of the Arts, in collaboration with the DAA, the proposed Task Force and working groups, and the proposed Commissioner should create and promote fair pay guidelines for different types of work in the creative economy, with a particular focus on providing guidance for work that is usually completed on a freelance basis. The fair payment and proper valuing of artists and creatives is vital for a healthy creative ecosystem and a cultural economy that is innovative and attracts talent. “Fair Play” guidelines have mostly been devised for the performance & celebration context to inform event organizers how much musicians and performers should be paid, depending on the size of the event, the length of the set, and other metrics. Meanwhile, the film sector has many such guidelines for various roles at all stages of production.

The purpose of this recommendation is not necessarily to attain minimum wage provisions for all agents in all sectors, although that could be a long term valuable intention. Rather, it is part of general efforts to reevaluate perceptions and expectations, especially of artists and musicians, etc., to create an environment that properly values culture and in which artists and creatives of different types are able to earn a living. Ultimately, it is about dispelling the common notion that artists are happy to work for free because they need exposure or because their work is a “hobby.”

Implementation Considerations:

- Identify where this work is already underway (for example, by Reel Families for Change and the Delaware Collective for Creative Economy), and use these efforts as a starting point for a State-endorsed proposal.
- Gather examples from elsewhere in the country, and from unions relevant to the different sectors.

- Active artists and practitioners should be encouraged to join any union that is already operating and relevant to them. For example, musicians can join AFM Local 21, the regional chapter of the American Federation of Musicians.⁵⁹
- In collaboration with musicians and performers, write recommended minimum payment designed for the sectors across the creative economy, taking into account the different roles in the sectors (for example, performers, lighting designers, managers etc.).
 - Advocate for State and public bodies to promote and follow these guidelines for all publicly organized community, social and cultural events.
- Support and promote recommendations from the proposed working groups and other stakeholder groups regarding fair pay guidelines for other sectors.
 - Special focus and energy can be given in the immediate future to best practices and industry standards in relation to the audiovisual & new media sector.
- These guidelines can be distributed to the state’s business community, so that they are aware of the value of local artists and creatives.
- Guidelines should be updated every two years to keep up with changes to the cost of living and industry standards in other states.
- **Diversity, Equity, Accessibility & Inclusion Imperatives:**
 - The guidelines should include imperatives against pay discrimination based on gender, race, religion, etc.
 - They should be especially vocal against pay discrimination for Black and women workers.
 - A notable example can be found in the Memphis Music Initiative’s “Call & Response: The Sound of a Black Arts Revolution.” The Call & Response advocates for the elimination of racial income disparity, noting that Black and brown youth leaders deserve to be paid a liveable wage in order to dispel the pervasive notion of “scarcity magic:’ that is, the idea that Black and brown leaders must make exceptional community change using only the crumbs from the philanthropic table.”⁶⁰
 - The guidelines should explicitly express the creative ecosystem’s desire to close the gender pay gap.
 - They should also recommend payments to interns and students, as a way to make sure that opportunities to learn in a workplace are not limited to those who already have financial stability.

⁵⁹ AFM local 21, “Welcome to AFM Local 21,” accessed January 9, 2023, <https://www.afm21.org/>.

⁶⁰ Memphis Music Initiative, “Call & Response: The Sound of a Black Arts Revolution,” accessed January 23, 2023, [https://assets.website-files.com/62255744d123ca97812d7eb0/6238992fd746f2a945d8e3ce_MMI-CallandResponse.p](https://assets.website-files.com/62255744d123ca97812d7eb0/6238992fd746f2a945d8e3ce_MMI-CallandResponse.pdf)
[df](https://assets.website-files.com/62255744d123ca97812d7eb0/6238992fd746f2a945d8e3ce_MMI-CallandResponse.p)

Benchmark: Musicians Fair Payment Policy, Hamilton, Canada⁶¹

What It Is: In 2021, the City of Hamilton formalized fair payment of musicians who perform at “City-led” events by enacting the Musicians Fair Payment Policy. The policy requires that musicians hired for City-led events are paid, at minimum, the current minimum annual rates established by the Canadian Federation of Musicians who are represented locally by the Hamilton Musicians Guild Local 293.

Who Is Responsible: The local chapter of the Canadian Federation of Musicians, the Hamilton Musicians Guild Local 293, was instrumental in getting the policy through municipal government.⁶² Fair wages for performance was a recommendation made by the Hamilton Music Advisory Team (HMAT) during the development of Hamilton’s Music Mondays series. The recommendation was endorsed again in the 2020 Mayor’s Task Force for Economic Recovery Report.⁶³ The policy was enacted by Hamilton City Council and applies to City staff responsible for organizing and managing internal or external City-led events or staff who oversee contracts for third-party vendors where musicians are hired for in-person or virtual performances.⁶⁴

What It Has Done: Hamilton is the first city in North America to enact a fair wage policy specifically targeted towards musicians. In addition to codifying the respectable payment for musicians, the policy has been a means of raising general public awareness around the importance of fair compensation for musicians. The policy has also garnered public recognition for the value of the work musicians do, especially with respect to live performances.

Rates can vary based on the type of performance and venue, however, the guidelines establish a minimum of \$200 and above per musician per performance.⁶⁵

Relevance for Delaware: By establishing minimum wage standards and formalizing respectable payment practices for musicians and creatives in general, Delaware can create a fairer and more equitable compensation structure for those that work within its

⁶¹ "Our Network", South East Local Enterprise Partnership, accessed November 24, 2023,

<https://www.southeastlep.com/our-network/working-groups/south-east-creative-economy-network/>.

⁶² Jeff Mahoney, "New policy ensures fair wage for musicians at city of Hamilton-led events," *The Hamilton Spectator*, July 7, 2021,

<https://www.thespec.com/news/hamilton-region/2021/07/06/new-policy-ensures-fair-wage-for-musicians-at-city-of-hamilton-led-events.html>.

⁶³ City of Hamilton, "Fair Payment of Musicians for City-Led Events Staff Policy (Policy) Rates of Pay and Factors for Consideration," accessed December 19, 2023,

<https://pub-hamilton.escrimeetings.com/FileStream.ashx?DocumentId=275905>.

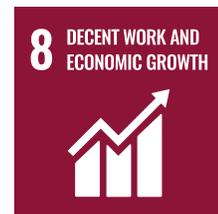
⁶⁴ Ibid.

⁶⁵ Ibid.

creative economy. Hamilton is a model to follow as it ensures that remuneration is in accordance with annual minimum pay rates and therefore can adapt with inflation. Ultimately, the implementation of fair payment guidelines and awareness campaigns can lead to a more sustainable and thriving creative ecosystem in the state, benefiting musicians, artists and audiences alike. In addition, the implementation of a standard for minimum payment will help make the performance and other creative sectors a more sustainable, feasible career choice, thereby making Delaware a more attractive place to live and work.

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.8: Protect labor rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment.



SUSTAINABLE DEVELOPMENT GOAL 10: Reduce Inequality Within and Among Countries

- Target 10.3: Ensure equal opportunity and reduce inequalities of outcome, including by eliminating discriminatory laws, policies and practices and promoting appropriate legislation, policies and action in this regard.
- Target 10.4: Adopt policies, especially fiscal, wage and social protection policies, and progressively achieve greater equality.



3.1.2.4. Recommendation 8: Modernize Delaware’s Film & Media-production Industry

Policy

Supporting Stakeholders: State of Delaware, Motion Picture and Television Development Commission, Delaware Division of the Arts, Reel Families for Change, Delaware Collective for the Creative Economy, Delaware Economic Development Authority, Delaware Prosperity Partnership, County and Town/City councils

Goals:

- Stimulate economic activity
- Improve governance and strategic thinking
- Increase transparency and accountability
- Address topics related to DEA&I
- Raise awareness of the creative economy and share knowledge across creative sectors
- Expand opportunities for professional development

Timeframe: Medium term (24-48 months)

Description: Delaware’s approach to its film & media sector needs significant modernization. Looking to the success of nearby jurisdictions that have developed a comprehensive approach to the industry, Delaware should refresh media production-related legislation, permits, and policy, especially related to film permits and tax incentives. To address the limited opportunities for local and international film companies working in Delaware, efforts should be focused towards the establishment of an enticing tax incentive program that competes with regional and national competition. Tax incentives are only the first step towards a competitive film industry, and Delaware should look to best case states like Utah (discussed below in case study) who also 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 conflict resolution, sustainability, and diversity.

The current Delaware Motion Picture and Television Development Commission should update its purview to be inclusive of the wider film and media industries (including TV and other digital formats: podcasts, documentary, streaming, and video games) and increase advocacy for both

local and international productions and projects. We recommend that the Commission change its name to be inclusive of Film and New Media/Audiovisual output, and also seek to make sure it is given the ability to represent this sector properly at a legislative level. The name change should come with a revision of the focus and the goals of the Commission. In addition to these more cosmetic changes, the Commission should advocate for increased funding and staffing. Increased input from Delaware's film, television & audiovisual production community, who have provided input to this research and can be identified via Sound Diplomacy's mapping, is needed towards these ends.

Modernizing the Commission to be inclusive of TV, streaming, and audiovisual productions more broadly will help bolster the already strong digital broadcasting sector that exists within the state. Furthermore, it will be a starting point for Delaware to be competitive and collaborative in relation to its neighbors such as Georgia and New York State, which already have developed film and television industries.

The Commission should also be subject to increased transparency in terms of decision making and ongoing activities, with information from meetings and decisions around budgeting made available on a public platform.

These initiatives have the potential to significantly improve Delaware's creative economy.

Implementation Considerations:

- As a starting point, the Delaware Motion Picture and Television Development Commission should advocate for a new model of support for the audiovisual industry in the state, leading to the drafting of a new Film & Entertainment Bill for Delaware.
- This renewed model of support should take into consideration:
 - A cap for the general film incentive based on the sector's needs and fiscal capacity.
 - Tailored criteria for local and (inter)national productions, considering different production sizes.
 - Different criteria for various audiovisual formats, including podcasts, documentary, and video games.
 - Inclusive criteria, considering funding quotas for gender and under-represented communities.
 - Extensive guidelines for media production in the state, including guidance on sustainability.
 - A comprehensive database of film-ready locations around the state. (The asset map could be used to identify audiovisual assets currently active in the state.)

- Once the new model is designed, the Commission, in collaboration with key stakeholders, should:
 - Schedule meetings with key decision-makers, including government officials and legislators, to present the case for an incentive program.
 - Provide data-backed arguments and showcase successful examples from incentive programs in Louisiana and Utah (see benchmarks).
- The Commission, the State, and economic development offices should assess application processes to streamline them, based on best cases in the US such as the Louisiana incentive. They should be accessible in the proposed One-Stop Shop.
- Once implemented, the Commission should:
 - Conduct or authorize assessments of the impact of the incentives, and publish reports to make the framework transparent.
 - Assist the government agency in charge with evaluating the impact of the initiative and adjusting it according to its success or challenges.
 - Encourage municipalities to review and update their film permit policies and processes regarding filming in public spaces, such as streets or parks. These should be available via the proposed One-Stop Shop (see [Recommendation 4](#)).

Diversity, Equity, Accessibility & Inclusion Imperatives:

- Any proposed funding structures should be tied to quotas related to increased and robust representation across the industry.
- New productions should be encouraged to follow equity, diversity, and ethical working guidelines, and fair pay as determined by the State.
- The Commission needs to work to be more representative and inclusive of Delaware’s film community. Towards these ends, any new guiding documentation or charter should specifically articulate how representation on the Commission and access to it might be expanded in a meaningful way.
- As part of the efforts to refresh the state’s approach to attracting film and audiovisual production, Delaware should seek to produce equity guidance that productions that take place within the state should be required to follow. These would need to be in line with any guidance provided by any of the unions related to the industry in the state.

Regional Considerations:

- Each County and City/Town’s film permit situation should be revised and clearly explained on the proposed One Stop Shop.

- If a tax credit is available, a condition could be that productions are more likely to be selected for that credit if they shoot in rural communities and use local suppliers for things such as catering, extras, etc.

Further Considerations:

- Efforts should be made to make the distinction between the Commission and private enterprises such as Film Delaware explicit and easily understandable to an outsider. A dedicated webpage explaining the role and activities of the Commission, tied in with the proposed One-Stop Shop (see [Recommendation 4](#)), would help with this.
- Given the uncertainty surrounding major Hollywood productions in recent years, the Commission may want to undertake research to find out how to attract productions being undertaken by the streaming services, and also by the independent media companies such as A24 and Annapurna Pictures.

Benchmark: Utah’s Motion Picture Incentive Program, US⁶⁶

What It Is: The Utah Film Commission markets the entire state of Utah for film, television and commercial production. It supports the development of its local talent and crew, promotes the state’s locations, industry businesses and the Motion Picture Incentive Program.

Utah’s original Motion Picture Incentive Program was introduced in 2011. It was revised in 2022 with an amendment to add additional tax credits available for productions that shoot at least 75% of their production days in a rural county. The standard incentive is a 20-25% tax credit for projects that spend a minimum of \$500,000 in Utah, with \$6.79 million available annually from the State legislature for this program. The additional credit is \$12 million made available for a 25% credit awarded to productions that shoot at least 75% of their production days in Utah’s rural communities.⁶⁷

In addition to this incentive program, the Utah Film Commission provides:⁶⁸

- Assistance with finding locally based crew.
- Facilities and vendors for production support.

⁶⁶ Utah Film Commission, “Homepage,” accessed January 5, 2024, <https://film.utah.gov/>.

⁶⁷ Utah Film Commission, “What’s Next For Utah’s Film Incentive Program?,” April 18, 2022, <https://film.utah.gov/utah-film-incentive-program-2-0/>.

⁶⁸ Utah Film Commission, “Production,” January 5, 2024, <https://film.utah.gov/production/>.

- Options for viable locations throughout the state. This includes a list of “Film Ready Communities.”⁶⁹
- Guidance on conflict resolution, including dealing with workplace harassment⁷⁰
- Guidelines for making productions more sustainable and greener.⁷¹

Who Is Responsible: Founded in 1974, the Utah Film Commission is part of the Utah Governor’s Office of Economic Opportunity and the Utah Office of Tourism.

What It Has Done: According to the Film Commission, between 2018 and 2022 Utah’s film incentive program generated:

- \$614 million in net output.
- \$301 million in direct spend from the industry.
- \$313 million created in the supply chain and subsequent wage effects.
- And, for every \$1 spent on film incentives, \$7 enters Utah’s economy through direct, indirect, and induced spending.

In 2021, the Motion Picture Association of Utah released an economic impact study that revealed that 86% of all films produced in Utah reported they would not have done so without the incentive. This number rises to 100% for out-of-state producers.

Between 2011 and 2021, the total impact of film production in Utah was:⁷²

- A total spend of \$604 million, \$268 of which took place in rural Utah.
- More than 32,000 days of production.
- The creation of more than 36,000 jobs.
- 237 projects supported by the tax incentive.
- And an estimated \$6 billion in film tourism (people coming to see locations where their favorite movies were shot).

Relevance for Delaware: Utah demonstrates how a well rounded legislative program can be the basis for a strong and economically impactful audiovisual sector. It also provides an example of how economic impact research can be used to market and brand a state as being friendly and able to accommodate film and TV productions, as well as highlights the sort of tax credit incentives that Delaware should be seeking to implement into its legislation.

⁶⁹ Utah Film Commission, “Film Ready Utah,” accessed January 5, 2024, <https://film.utah.gov/film-ready-utah/>.

⁷⁰ Utah Film Commission, “Workplace Conflict,” August 2, 2022, <https://film.utah.gov/workplace-conflict/>.

⁷¹ Utah Film Commission, “Guideline to Green Production,” accessed January 5, 2024, <https://film.utah.gov/guideline-to-green-production/>.

⁷² Utah Film Commission, “About,” accessed January 5, 2024, <https://film.utah.gov/about/>.

Benchmark: Motion Picture Production Program in Louisiana, US⁷³

What It Is: The Motion Picture Production Program in Louisiana offers a tax credit of up to 40% on total qualified in-state production expenditures, encompassing both resident and non-resident labor for motion picture productions. Additionally, for productions choosing to work on Visual Effects (VFX) in Louisiana, there is an extra 5% credit on VFX expenses.⁷⁴

A minimum of \$50,000 of in-state expenditures are required for Louisiana screenplay productions; \$300,000 is required on all other eligible productions. The maximum amount of credits that can be issued is \$150 million per fiscal year. Tax credits may be used to offset personal or corporate income tax liability in Louisiana, and may be transferred back to the State for 90% of face value (this requires a 2% transfer fee).

10% of the \$150 million issuance cap (\$15 million) is reserved for independent film productions, while 5% of the \$150 million issuance cap (\$7.5 million) is reserved for Louisiana screenplay productions. For State-certified productions with a total base investment greater than \$300,000, or for Louisiana screenplay State-certified productions with a total base investment equal to or greater than \$50,000, a tax credit of 25% of the base investment may be allowed.

State-certified productions with expenditures equal to or greater than \$50,000, but no greater than \$5 million, based upon a screenplay created by a Louisiana resident, may be eligible for an increased 10% credit of the base investment (35% total). State-certified productions that have their production office and at least 60% of principal photography based and occurring outside of the New Orleans Metropolitan Statistical Area (NOLA-MSA) may be eligible for an increased 5% credit of base investment (30% total or 40% total for a Louisiana screenplay shot outside of the zone).

The application form is completely online, increasing accessibility and avoiding bureaucracy. The Louisiana Economic Development office (LED) issues an initial certification after this process, which allows it to track a production project's expenses and submit a cost report to the office online. An expenditure verification report is performed by an independent Certified Public Accountant selected by the Office of

⁷³ Louisiana Entertainment, "Incentives," accessed November 20, 2023, <https://www.louisianaentertainment.gov/film/incentives>.

⁷⁴ This is applicable if at least 50% of the VFX budget is spent on services performed in Louisiana by an approved Qualified Entertainment Company (QEC), or if a minimum of \$1 million in qualified VFX expenditures is incurred in Louisiana. Ibid.

Entertainment Industry Development. If approved, LED issues Final Certification for the amount of the tax credit.

The program is open to all motion picture production companies headquartered and domiciled in Louisiana producing nationally or internationally distributed motion pictures.

Who Is Responsible: Louisiana Entertainment, part of the Louisiana Economic Development office.

What It Has Done: Louisiana’s Motion Picture Production Program was the first of its kind when it debuted in the early 1990s (it was subsequently expanded in 2002). It has attracted film productions, led to the creation of state-of-the-art studio spaces, and built an ecosystem that supports jobs. Since the inception of the Motion Picture Production Program, the State has certified over \$9 billion in direct in-state spending. According to the most recent analysis from 2022, \$6.12 is generated for every \$1 in credit issued.⁷⁵

The analysis also shows that the program has created or supported:

- Nearly 10,000 jobs.
- Over \$800 million in sales to Louisiana businesses.
- Over \$338 million in earnings for Louisiana residents.
- \$2.3 billion in resident payroll.

Relevance for Delaware: Delaware can take from Louisiana the strategy to encourage through tax credits a range of work associated with the audiovisual industry, not just a focus on productions. This includes the pre-production and creation stages, as well as post-production such as VFX. It also offers another benchmark for the % tax credit and the amount of budget set aside for this credit that Delaware should seek to emulate in its own legislation.

⁷⁵ Louisiana Economic Development, “LED Annual Report 2022,” accessed December 5, 2023, <https://www.ledannualreport.com/sections/entertainment-thrives-in-louisiana>.

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

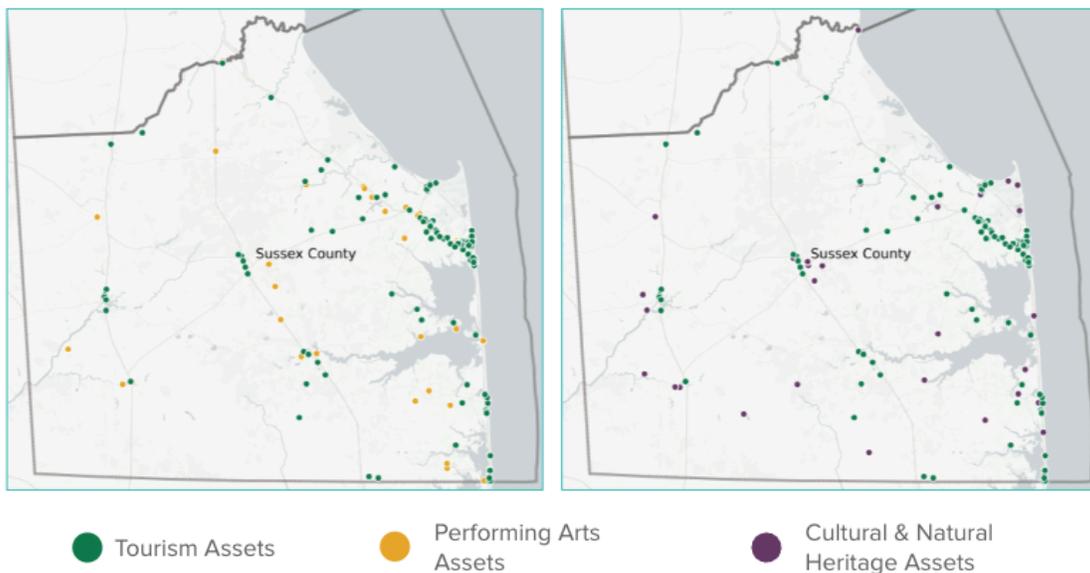


- Target 8.2: Achieve higher levels of economic productivity through diversification, technological upgrading and innovation, including through a focus on high-value added and labor-intensive sectors.
- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.

3.1.3. Tourism

Delaware is home to a significant tourism industry that is, at present, not fully integrated with the creative economy. Sound Diplomacy’s economic impact assessment found 260 tourism assets in the state, with the highest concentration in Sussex County (53%). Mapping identified a geospatial correlation between tourism, performing arts, and natural and cultural heritage in Sussex County, suggesting an opportunity for further integration of these sectors towards the benefit of cultural tourism in the state.

Figure 19. Tourism and Cultural Assets’ Geospatial Correlation in Sussex County



As can be observed, assets from each of these sectors are geospatially located alongside tourism assets in Sussex County, and are sectors that typically drive and attract cultural tourism. Additionally, Sound Diplomacy's mapping found that Sussex County has significant accommodation assets (representing 18% of all assets in the cultural economy, versus 9% in Kent County and 6% in New Castle County).⁷⁶ The combination of cultural and accommodation assets places Sussex County as well-poised for the development of cultural tourism clusters.

The regional nature of tourism in the state does pose some challenges. The majority of cultural activities in the state are centered in the northern New Castle County, but the area does not have much in the way of tourist activities as it is overshadowed by Philadelphia. Conversely, there is significant tourism activity in southern Sussex County, but again more could be done to link tourism with cultural economic activity. Kent County is frequently missing from conversations around the creative economy and tourism generally, even though there is a concentration of assets around Dover.

The tourism sector in Delaware at present does not play a significant role in the income of creatives or cultural sector organizations. 78% of creatives and 75% of organizations rated the reliance on tourism between 1 and 3 (out of 5, with 1 indicating very little or no dependence). Relatedly, neither creatives nor creative organizations consider Delaware to be a cultural tourism destination. These findings align with Delaware's tourism industry data, which ranks it among the five least-visited states in the United States.⁷⁷ That said, a 2021 Value of Tourism report produced by Visit Delaware shows 45% of visitors to Delaware participate in some cultural activity and 65% in some entertainment activity.⁷⁸ In addition, the Arts & Economic Prosperity 6 report from Americans for the Arts says that 25.3% of attendees to events by nonprofit organizations in Delaware in 2022 were visitors who traveled from outside Delaware. The report goes on to say that they spent an average of \$67.47.⁷⁹ This shows that while there are low perceptions of the impact of tourism on the creative economy, there is already a base there to build upon.

These findings reveal that the state is well positioned to grow its tourism sector significantly, and can do so with the creative economy at the center of any new developments. Recent activity points towards the actualization of this new focus, with the project precipitating a new marketing campaign for the Creative Economy generally. Additionally, our literature review shows that the

⁷⁶ Classed under "tourism assets."

⁷⁷ Carla Vianna, "US tourism top states stats round-up post," *XOLA*, December 5, 2022, <https://www.xola.com/articles/us-tourism-top-states-stats-round-up-post/>.

⁷⁸ Visit Delaware, "The Value of Tourism 2021," [visitdelaware.com](https://www.visitdelaware.com/sites/default/files/2023-05/The%20Value%20of%20Tourism%202021%20FINAL.pdf), accessed February 21, 2024, <https://www.visitdelaware.com/sites/default/files/2023-05/The%20Value%20of%20Tourism%202021%20FINAL.pdf>

⁷⁹ Americans for the Arts, "Arts & Economic Prosperity 6: The Economic & Social Impact Study of Nonprofit Arts & Culture Organizations & Their Audiences in Delaware." (Washington, DC, 2023), 4.

Delaware Tourism Office is preparing a new strategic plan for 2024 that will place a renewed emphasis on arts and culture. Support for the creative economy in connection to tourism will also align with Delaware Tourism Office’s mission to:

- Attract large volumes of out-of-state visitors to Delaware.
- Assist existing tourism businesses to grow and prosper.
- Market Delaware as a preferred tourist destination.

Conclusion

It is estimated that by 2033, the global cultural tourism market will be worth US\$22,772 million.⁸⁰ Stakeholders noted a desire for State tourism to amplify the arts but that, in terms of branding, Delaware is seen as a “pass-through” state. Delaware is located close to established hubs of activity, such as Philadelphia and New York City, which are connected by regular train service. This proximity poses a challenge but also an opportunity. While it encourages people to leave the state for activities rather than engage locally, it also provides Delaware with the opportunity to clearly distinguish its creative economy from that of its closest neighbors. That said, while some synergies between tourism and the arts may exist, they are not sufficient enough to define Delaware as a prominent destination for cultural tourism. Delaware needs to reconsider its tourism strategy to highlight the unique benefits of the state, rather than its geographical proximity to others, and the arts have the potential to drive this reconsideration. At present, stakeholders in the creative industries have a strong desire to be more fully integrated with tourism, and the positioning of existing tourism assets in the south of the state are already well-poised to integrate culture into the tourism industry. Improving cultural tourism will be important to growing Delaware’s creative economy. This is because tourists are increasingly looking to combine leisure with “authentic” experiences, learning about history, engaging with art, etc. Special events and festivals that feature music, performances, etc., are also major “pull” factors.

3.1.3.1. Recommendation 9: Develop a Statewide Cultural Economy Brand to Benefit Tourism, Economic Development, Export, and Audience Development

Action

Supporting Stakeholders: Visit Delaware, Delaware Division of the Arts, Delaware Prosperity Partnership, Southern Delaware Tourism Office, Kent County Convention and Visitor Bureau,

⁸⁰ Future Markets Insights, Inc., “Cultural Tourism Market Anticipating a 14.4% CAGR Surge & to reach US\$ 22,772.0 Million by 2033 | FMI,” *EIN Presswire*, December 18, 2023, <https://www.einpresswire.com/article/675800982/cultural-tourism-market-anticipating-a-14-4-cagr-surge-to-reach-us-22-772-0-million-by-2033-fmj>.

Greater Wilmington Convention and Visitors Bureau, proposed Task Force & working groups,
Delaware Arts Alliance

Goals:

- Stimulate economic activity
- Improve governance and strategic thinking
- Raise awareness of the creative economy and share knowledge across creative sectors
- Create opportunities for a richer tourism offering

Timeframe: Short term (1-24 months)

Description: A statewide brand for Delaware’s creative economy would consist of a distinctive image, identity, and reputation that is strategically crafted and communicated to emphasize the state’s cultural, artistic, and creative assets. A cohesive, statewide cultural economy brand can be used by tourism, export, economic development and arts agencies. This will give Delaware a distinctive, 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.

The brand would highlight Delaware’s cultural and creative strengths as a core element of its identity and therefore an attraction. This narrative will acknowledge, protect, and promote the role of the creative industries in Delaware’s long history as the 1st state, and their impact on the state in the present day. This brand should encompass all creative industry sectors, but in the first instance draw on the sectors that already have high levels of activity in the state, in particular visual arts & crafts. This brand will need to be distinct from the outdoors and sports activity focus of the statewide tourism brand that is currently prominent, although there will be opportunities to combine the two (i.e. in outdoor art works). It also needs to be partnered with an improvement in how arts & culture is featured in tourism communications (see [Recommendation 11](#)).

Sound Diplomacy recommends Visit Delaware, with key stakeholders such as the Prosperity Partnership and the Delaware Division of the Arts, works with a cultural branding agency, preferably one based locally, to develop an identity and strategy that can be used in any channels and materials that discuss and promote Delaware’s creative economy. This agency can also work to prepare an action plan Visit Delaware can use to launch Delaware’s refreshed cultural tourism brand, how economic development and export agencies can integrate this branding into their own work, and make suggestions on actions that could be made in the future to sustain Delaware’s new identity as an arts & culture hub. The brand should be informed by local individuals and organizations from diverse backgrounds and professional roles to ensure that it is representative of all. The asset map can serve as a useful tool in the development of the

brand in identifying geospatial correlations between the creative economy and tourism, as in Sussex County.

The resulting branding should be used on any digital platforms related to Delaware's creative economy, especially the proposed One-Stop Shop, and Delaware Scene.

Benchmark: ProColombia, Colombia⁸¹

What It Is: ProColombia is an entity supported by the Colombian government that is in charge of promoting the Colombian creative economy and highlighting Colombia as a destination for business, foreign investment and tourism. ProColombia's activities include:

- Identifying market opportunities.
- Becoming a liaison between entrepreneurs and businesses through commercial promotion, investment and international tourism activities.
- Design market penetration strategies.
- Internationalization of Colombian companies.
- Support businesses in the design of business action plans.
- Offer specialized services to foreign investors that are interested in acquiring Colombian goods and services and investing in the country.
- Foster the alliance between international, public and private entities to collaborate towards boosting the local economy.

ProColombia led the creation of the country brand with the slogan of Marca Colombia, "Colombia: El país más acogedor del mundo" (*Colombia: The most welcoming country in the world* in English), and created a visual identity for the country, highlighting its biodiversity, cultural diversity, and its potential to become a business leader in Latin America. Since its launch in 2021, Marca Colombia has been displayed in every event with ProColombia's participation, and has also become a quality seal that is displayed on export products, Colombian businesses and brands abroad, and tourism venues supported by ProColombia.

Who Is Responsible: Colombia's Ministry for Commerce, Industry and Tourism

⁸¹ PROCOLOMBIA, "¿Qué es PROCOLOMBIA?," accessed November 16, 2023, <https://procolombia.co/nosotros/que-es-procolombia>.

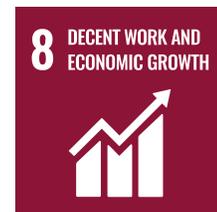
What It Has Done: Marca Colombia was conceived as a tool to promote the country, bringing over 11 billion dollars in foreign investment, and attracting over 5.5 million tourists annually.⁸² [Marca País Website](#) includes specific sections on tourism and Colombian CCI, working to create a narrative on Colombia as a country that not only thrives in terms of business, but that it is also a country where tourism and culture play a significant role in strengthening the country's identity.

In 2022, Brand Finance analyzed over 120 country brands and Colombia was rated as the second best brand in the region, with Brazil coming first. This recognition was obtained due to the increase in the positive perception of the country's brand, as well as the positive results obtained in all lines of work promoted by ProColombia, including the attraction of 67 billion dollars in foreign investment, exports of non-mining related goods, and international tourism.⁸³

Relevance for Delaware: ProColombia is a relevant example of a unified country brand that includes tourism and the creative economy. It is important to highlight that ProColombia understands the creative economy as a vital asset for exporting and investment attraction efforts, and conceives Marca País as a resource that is nurtured by the promotion of local assets from tourism, arts, and gastronomy. Furthermore, the brand promotes the creation of alliances between other entities related to the industry so they are equipped to amplify the country's marketing efforts.

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.9: By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products.



⁸² Valentina Acosta Fonseca, "Tras nueve años, Marca País de ProColombia estrenará su tercer lema", *LaRepública*, April 5, 2021, <https://www.larepublica.co/economia/luego-de-nueve-anos-marca-pais-de-procolombia-estrenara-su-tercer-lema-de-la-historia-3147499>.

⁸³ PROCOLOMBIA, "Colombia subió 4 puestos en el ranking mundial de marcas país," June 24, 2022, <https://prensa.procolombia.co/colombia-subio-4-puestos-en-el-ranking-mundial-de-marcas-pais>.

SUSTAINABLE DEVELOPMENT GOAL 12: Ensure Sustainable Consumption and Production Patterns

- Target 12.A: Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products.



3.1.3.2. Recommendation 10: Increase Cultural Tourism Offerings

Action

Supporting Stakeholders: Visit Delaware, Delaware Division of the Arts, Southern Delaware Tourism Office, Kent County Convention and Visitor Bureau, Greater Wilmington Convention and Visitors Bureau

Goals:

- Stimulate economic activity
- Raise awareness of the creative economy and share knowledge across creative sectors
- Create opportunities for richer tourism offerings
- Promote and celebrate the cultural diversity of Delaware
- Foster cross-cultural exchanges and artistic collaborations
- Engage local communities
- Build new audiences

Timeframe: Medium term (24-48 months)

Description: In order to grow Delaware's cultural tourism, there needs to be a specific focus on increasing the cultural activities and events available and marketed to tourists and residents alike. The promotion of cultural tourism offerings in the state should reflect a deliberate and planned approach to attracting visitors by showcasing the cultural heritage, traditions, arts, entertainment, and creative expressions of the destination. It has been well established that the

interconnection of culture and tourism contributes significantly to the expansion of the tourism industry.⁸⁴

The number of tourists visiting Delaware specifically for cultural tourism can be increased by providing unique and authentic cultural encounters while simultaneously contributing to the economic and social development of the local community. In Delaware, such a strategy has the potential to simultaneously enhance tourism through cultural activities and boost the creative economy through tourism.

Referring to the target personas that Visit Delaware has developed as part of its broader tourism strategy, the state's various tourism offices should work to support an expansion of arts programs and events that attract tourists year-round. Examples include:

- Public art installations by local artists in key locations, rotated and updated yearly.
- Arts fairs that are located in spots easily accessible to tourists in the busy seasons.
- Collaborate with artists to host open studio days.
- Include museums and galleries in tourist passes and maps covering regional attractions. The asset map can function as a tool to identify interesting attractions that may otherwise fall below the radar of tourists.
- Provide pop-up opportunities to cultural organizations and individuals to trial their business in vacant storefronts and other meanwhile spaces.
- Trial crafts and open air arts markets in downtown areas.
- Create a curated culture package that bundles admission to theaters and museums.
- Assuming the loss of Firefly, develop similar music festivals that position Delaware as a festival destination along the lines of Coachella or Bonnaroo.
- Showcase themed cultural routes in cities like Wilmington and Dover that guide tourists through historical sites, film/tv locations, music venues, art galleries, museums, and traditional craft markets, offering immersive cultural experiences. These routes should be conveniently accessible to every tourist at key points throughout their journey, from the airport to hotels and restaurants, and may incorporate elements of pedal pub/arts and wine tours.
- Develop interactive exhibitions and shows in local airports that show tourists Delaware's history and arts through multimedia exhibits and immersive experiences.

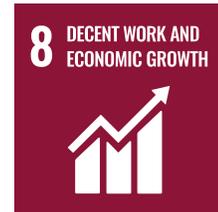
Regional Considerations:

⁸⁴ Data from the World Tourism Organization (UNWTO) indicates that approximately 40% of tourism is associated with cultural tourism. "UNWTO Global Conference on Linking Tourism, Culture and Creative Industries: Pathways to Recovery and Inclusive Development," *UNWTO*, November 14, 2022, <https://www.unwto.org/event/unwto-conference-on-linking-tourism-culture-industries>.

- This recommendation should have specific merit for Sussex County. Stakeholders noted that, while there are cultural activities ongoing in the area during tourist season, they are not fully integrated to benefit from the high numbers of coastal tourists. As our mapping found a correlation between tourism, performing arts, and cultural heritage assets in the county, multi-sector cultural packages should be developed for the already present tourists. This may include a pass for a cultural itinerary that visits a museum or heritage site in the morning and ends with a performing arts show in the evening, with included stops at notable restaurants, bars, and venues throughout the day.

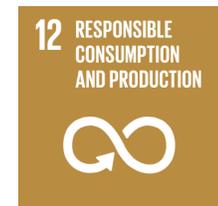
SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.9: By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products.



SUSTAINABLE DEVELOPMENT GOAL 12: Ensure Sustainable Consumption and Production Patterns

- Target 12.A: Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products.



3.1.3.3. Recommendation 11: Emphasize Arts & Culture in Delaware’s Tourism Communications

Action

Supporting Stakeholders: Visit Delaware, Southern Delaware Tourism Office, Kent County Convention and Visitor Bureau, Greater Wilmington Convention and Visitors Bureau, Delaware Division of the Arts, DAA Project Lead, proposed Task Force and working groups

Goals:

- Stimulate economic activity
- Improve governance and strategic thinking
- Foster cross-sector collaboration and interdisciplinary dialogues
- Tackle issues related to geographic inequality
- Create opportunities for a richer tourism offering

Timeframe: Short term (1-24 months)

Description: Visit Delaware should work to improve the prominence that the creative economy and creative industries have in tourism communications and platforms. Delaware should continue its current efforts to align its creative ecosystem with its broader tourism efforts, and work to highlight activities and vendors from the creative economy whenever possible. Increasing cultural tourism has the potential to attract visitors and stimulate economic activity.

As the benchmark case study included below demonstrates, there are numerous ways that arts and culture can be implemented into tourism communications, for example:

- Add a “Culture & Arts” subsection to the core Visit Delaware website in line with best practices.
- Provide a cultural inventory, as an interactive map, for example, on all the tourism websites (this can be done using and based on the Carto map completed as part of Sound Diplomacy’s mapping analysis).
- Make sure that any webpages related to Arts & Culture on tourism platforms are SEO optimized.
- Place physical advertising materials in hotels, holiday lets, etc.
- Partner with influencers that appeal to target audiences to share cultural and arts offerings to their audiences.
- A map of galleries and arts fairs, including opening times.

Diversity, Equity, Accessibility & Inclusion Imperatives:

- Promote BIPOC and women-owned retailers, galleries, artists, etc. to visitors whenever possible on websites and social media channels.
- Ensure that Delaware’s brand and ambassadors of it are representative of Delawareans.

Regional Considerations:

- While regional identities will remain important, it is also beneficial for there to be as much uniformity and statewide thinking and alignment when it comes to promoting the state's arts and cultural scene. Each county will benefit from discussing each others' offerings and also pushing visitors towards a centralized resource (see [Recommendation 25](#)).
- Southern Delaware has an app called SouthDelSidekick which helps people navigate through the southern part of the state and also provides them with listings of events and activities. A medium term plan should be to investigate the potential of expanding this app to be applicable statewide.

Benchmark: New Mexico's Arts, History & Culture Website⁸⁵

What It Is: New Mexico's Tourism Department's website has a page extensively detailing all of the assets and activities relating to the state's arts and creative economy. This is in addition to the activities, things to do and places to visit portals it also hosts.

Who Is Responsible: The New Mexico Tourism Department is a State agency of New Mexico. It publishes New Mexico Magazine and distributes New Mexico True Television.

What It Has Done: The arts, history and culture page foregrounds the state's diversity and Native American heritage. It presents visitors with a number of ways to engage with its creative economy by allowing them to browse:

- Art Galleries and Studios
- Meow Wolf
- Museums & Historic Sites
- Performing Arts
- Native American Art
- Studio Tours
- Arts & Cultural Districts
- Historical Cathedrals

Each page dedicated to these topics tends to come with a map of assets, a calendar of events, and external links for more information.

⁸⁵ New Mexico True, "Arts, History & Culture," accessed January 4, 2024, <https://www.newmexico.org/things-to-do/arts-culture/>.

Furthermore, the page sends visitors towards the state’s museums, tour operators and annual events of all types.

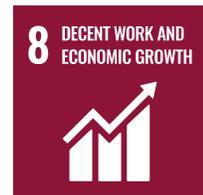
Finally, there is an interactive map/index of events, locations, etc., from the state’s creative economy, that can be filtered by category, region and city.

Regarding tourism generally speaking, a study conducted by the New Mexico Tourism Department revealed that the state recorded an unprecedented \$8.3 billion in direct visitor spending in 2022, marking an increase of \$1.1 billion compared to 2021. The study also found in the same year tourism made a total economic impact of \$11.2 billion and that 48% of all visitor spending occurred in rural communities. Recreation accounted for \$345.7 million of the total visitor expenditure.⁸⁶

Relevance for Delaware: New Mexico demonstrates how arts & culture can be a core part of a holistic tourism communications strategy that makes an impressive economic impact upon a state. While the scale and context is very different to Delaware, the New Mexico tourism site shows how arts and culture can be showcased and promoted in a dynamic and interactive fashion, making it easy and appealing for tourists to engage with the related offering.

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.2: Achieve higher levels of economic productivity through diversification, technological upgrading and innovation, including through a focus on high-value added and labor-intensive sectors.
- Target 8.9: By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products.



⁸⁶ New Mexico True, “Research, Plans & Reports,” accessed January 4, 2024, <https://www.newmexico.org/industry/resources/research/>.

SUSTAINABLE DEVELOPMENT GOAL 11: Make Cities and Human Settlements Inclusive, Safe, Resilient and Sustainable

- Target 11.4: Strengthen efforts to protect and safeguard the world’s cultural and natural heritage.



SUSTAINABLE DEVELOPMENT GOAL 12: Ensure Sustainable Consumption and Production Patterns

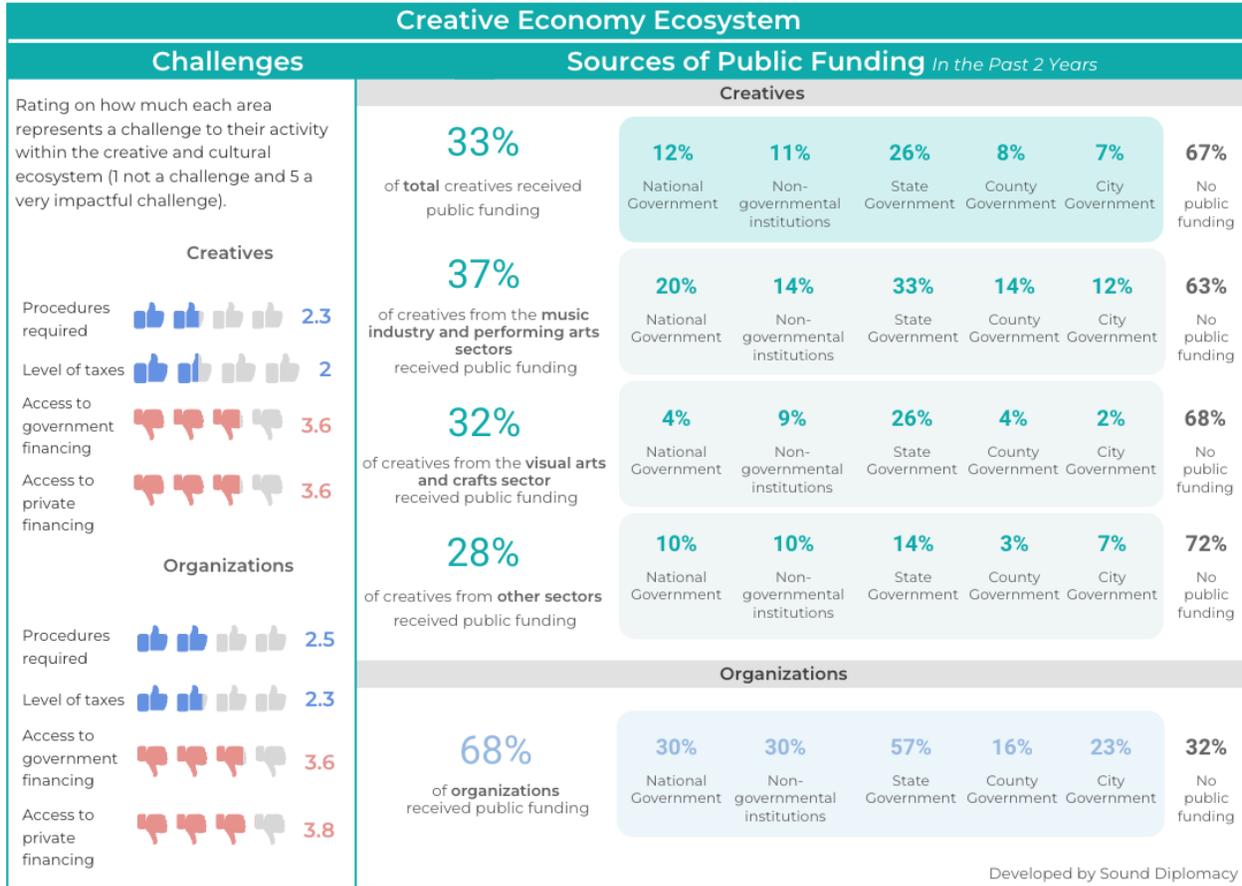
- Target 12.10: Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products.



3.1.4. Funding

Adequate funding for the arts is a perennial issue in the United States, but the need in Delaware for additional funding and funding structures is particularly acute. Sound Diplomacy’s survey analysis found that access to public and private financing poses a significant challenge for both individual creatives and creative organizations in Delaware. The majority of creatives (67%) responded that they have not received any grants in the last two years from State or Federal governments. The majority of creative organizations (68%), however, have received funding in the last two years. Nonetheless, these organizations still face significant challenges in meeting their operating costs, and the data explored in the above Industry Support section underscore the fact that funding is, at present, insufficient. Added to this is the prevalence of small and independently-owned businesses, meaning that while creative organizations may receive funding, most individual artists and creatives do not.

Figure 20. Creative and Cultural Ecosystem Challenges: Key Findings, Survey⁸⁷



When asked to rank the ways they believed Delaware State government support could be most impactful to them, survey respondents highlighted a desire for increased co-financing of exhibition and production infrastructure. Conversely, respondents dismissed the need for increased funding for international cooperation and export, signaling that localized increases to arts funding and better promotion of said funding should make a significant difference to arts financing realities in Delaware.

Available Funding

⁸⁷ Percentages on the far right side and percentages on the left side add up 100%, as they show the proportion of creatives by group/sector that did or did not receive public funding. In the middle, percentages on the green boxes show the sources of public funding for those creatives that claimed to have received it. Percentages in green aren't meant to add up to the value on the left or 100%, as one creative could have received public funding from more than one source.

Despite the above discussed realities, it must be noted that funding structures that support the arts and creative economy do exist in Delaware. The primary funding body for arts in the state, the Delaware Division of the Arts, provides a number of yearly grants, and there are funds available from a number of private charitable organizations. Though funding streams offered by the DDOA need to continue to be sustainably supported and expanded, they should not bear the full burden of arts funding in the state, and new streams are needed in related agencies such as those representing education, tourism, health & wellness, small businesses, and from county governments. Additionally, knowledge of current funding streams across the creative economy is uneven, and a centralized resource of all available funding opportunities and tools for effective application does not exist.

Funding Uncertainties & Inequities

Sound Diplomacy’s desk research underscores the issue of funding uncertainty in the state. In 2024, the State budget will provide an increase of over \$1 million in additional funding grants for the Delaware Division of the Arts, but this comes after a full decade of stagnant funding. Additionally, the earmarked line item funding for the DDOA represents 0.001% of the State’s overall budget for 2024.⁸⁸ There is State funding for the arts in Delaware, but this infinitesimal percentage, coupled with inefficient bureaucratic structures and minimal taxation (such as a sales tax), creates a major barrier to sustained, consistent support for the arts.

Beyond stagnant and slowly growing State funding, stakeholders noted that funding from private philanthropic individuals and organizations is inconsistent year-to-year, meaning that multi-year projects and businesses are difficult to design and sustain under a feast-or-famine model. Support from both private and public entities focus exclusively on not-for-profit creative endeavors, and so for-profit creative businesses have a difficult time securing funding specifically earmarked for the arts.

Equity is a pervasive issue in terms of arts funding, though some progress has been made. The DDOA, for example, includes providing opportunities for “expanding diversity, equity, and inclusion in arts programming and participation” as the top item in their project support guidelines, and “exemplary” scored applications must include “detailed plans” to engage “historically under-resourced geographic and/or underrepresented communities, and people with disabilities.”⁸⁹ Nonetheless, stakeholders from a variety of sectors related that previous funding and granting schemes have not always cultivated diversity, and that what funds are available are not evenly distributed across the creative economy. Well-known funding structures such as the

⁸⁸ National Assembly for State Arts Agencies, “State Arts Agency Legislative Appropriations Preview, Fiscal Year 2024,” accessed December 8, 2023,

<https://nasaa-arts.org/wp-content/uploads/2023/07/FY2024-SAA-Legislative-Appropriations-Preview.pdf>.

⁸⁹ Delaware Division of the Arts, “Project Support Application Guidelines - Fiscal Year 2025,” delaware.gov, accessed February 23, 2024, <https://artsfiles.delaware.gov/grants/project-support-guidelines.pdf>.

EDGE grants have not been as accessible to BIPOC, women, and nonbinary artists and creative businesses because of systemic racism, sexism, and Queerphobia. Added to this is an awareness and communications issue when it comes to arts funding in Delaware, especially in more rural areas.

Stakeholder Perception

Funding was a regular subject of conversation during Sound Diplomacy's stakeholder engagement process. Stakeholders identified the example of Maryland, which provides a fixed yearly increase to arts funding, while funding in Delaware is dependent on organizational advocating for insufficient line item increases to funding. Additional sources of funding from related industries such as health and education have not been adequately explored, and there is a perception that the business community in Delaware does not feel any particular responsibility for the arts community in the state. Overall, funding in the state is geared towards small businesses and, while this includes many creative entities, others are unable to secure funding. Some entities, such as The Delaware Motion Picture and Television Development Commission have received recent funding, but there is a lack of transparency about how said funds are being utilized.

Conclusion

While private and public funding streams for the creative economy exist in Delaware, the overall funding context is perceived by stakeholders to be inconsistent, unreliable, and insufficient. Although significant and sustained funding increases from the government cannot be guaranteed at this stage, additional revenue streams from a variety of sources need to be identified and available funding needs to be made more accessible and equitable. DDOA funding structures need to be shored up and made sustainable, and the responsibility of funding needs to be distributed to other agencies and bodies.

3.1.4.1. Recommendation 12: Identify Additional Revenue Streams to Support Delaware's Creative Economy

Policy

Supporting Stakeholders: Delaware Arts Alliance, Delaware Division of the Arts, Proposed Task Force & working groups, Delaware Collective for the Creative Economy, Businesses based in Delaware, Delaware Division of Small Business

Goals:

- Stimulate economic activity
- Address topics related to DEA&I
- Tackle issues related to geographic inequality

Timeframe: Short term (1-24 months)

Description: Identifying additional sources of funding is crucial for the sustainability and growth of a creative economy. Given the legislative reality of the Division of the Arts, and funding which comes from bodies such as the National Endowment of the Arts, this recommendation is devised for identifying funding sources and investment opportunities for the for-profit arts and creative sectors.

Business leaders in the region can be lobbied for support of the state's creatives and creative economy. DAA's Communications Partner can be brought on board to brainstorm ideas for targeting this audience. The asset map can be deployed to convey the broad reach of the creative economy across the state to these stakeholders.

Implementation Considerations: Delaware's various arts advocacy groups and organizations will need to continuously work with the government to ensure that arts funding remains stable, and that financial support for for-profit development increases. At the same time as the creative economy is better integrated into economic development plans (see [Recommendation 5](#)), the proposed working groups and Task Force can work to identify additional sources of funding for Delaware's nonprofit arts. Suggestions relevant to Delaware include:

- The introduction of an LLC/Incorporation surcharge that could be earmarked specifically for the arts. Additional revenue generated from the potential legalization of marijuana could be partially or fully earmarked for the arts (especially work such as arts therapy for people affected by addiction).
- A replication of the EDGE Grants currently available via the Division of Small Business, targeted specifically at creative economy sectors.
 - Where possible, any already existing relevance of these grants to creative industry businesses should be made explicit.
- A portion of revenues derived from lottery sales should be earmarked to support the arts and the creative economy.
 - This is already the case in other parts of the US, such as Ohio.

- Currently, the Delaware Lottery funds public and higher education; health and social services; public safety; judicial and corrections; child, youth and family services; natural resources and environmental control.⁹⁰
- Delaware’s arts ecosystem should support Visit Delaware’s efforts for the State to amend the lodging tax as it relates to short term rentals. At the time of writing, this is currently drafted as House Bill 168: An Act to Amend Titles 9 and 30 of the Delaware Code relating to Lodging Tax to include Short-Term Rentals.
 - This Bill seeks to address the fact that Delaware is one of only two states that doesn’t collect lobby tax on short term rentals.
 - In the Bill, 5/8s of the revenue is proposed to go to the State’s general fund. This general fund can be tapped to support the arts, and could, for example, be earmarked in the first instance to partly fund the development of creative hubs (see [Recommendation 2](#)).
 - The proposed Task Force and working groups should advocate for an additional \$0.25 tourist tax (added per night of a stay in a hotel or rental property) to be earmarked 50/50 between arts education and further support for the creative economy and creative hubs.

The DAA’s Project Lead, the proposed Task Force and the working groups can highlight the social and communal benefits of supporting Delaware’s creative ecosystem, and the economic and business benefits that can result from it. Businesses and business leaders need guidance on exactly how they can support the creative economy on a philanthropic basis. Ideas include:

- Source creative services, such as graphic design, marketing, photography and content creation, from local creative businesses.
 - This can be facilitated with a well functioning index of regional talent (see [Recommendation 25](#)).
- Provide financial support through sponsorships of local arts events, festivals, and exhibitions. Microgrant programs can be initiated in collaboration with the Division of the Arts.
- Company events may include a creative or cultural element, supplied by a Delawarean practitioner or arts organization.
- Businesses with offices can invite local artists to install exhibitions in lobbies or elsewhere in offices on a rotating basis.
- Highlight the region's cultural assets and creative events to employees, and incentivize them to attend an event listed on DelawareScene (through subsidized ticketing, organized staff activities to events, corporate memberships at arts and cultural spaces etc.).

⁹⁰ Delaware Lottery, “Where The Money Goes,” accessed January 26, 2024, <https://www.delottery.com/Financials/Where-The-Money-Goes>.

- Incorporate arts and culture into employee engagement programs, such as organizing art classes, workshops, or visits to local galleries.
- Artists working in different mediums can be employed on a freelance basis to provide “creative training” to staff.
- Sponsor art supplies, instruments, equipment, workshops, or mentorship programs for students interested in the arts.
- Participate in advocacy efforts to promote policies that support the creative economy (such as those in [Recommendation 3](#)).
- Support initiatives that leverage technology for creative expression and business development.
- **Diversity, Equity, Accessibility & Inclusion Imperatives:**
 - A majority proportion of additional future funds should be earmarked for projects led by BIPOC and projects that provide arts access to under-resourced communities, such as the disability community.

Benchmark: Maryland’s State Arts Budget Provision and Support

What It Is: The State Arts budget is supported by the Governor's Office, and is distributed by the Maryland State Arts Council, an agency of the State of Maryland Department of Commerce Division of Tourism, Film and the Art.

Section 7-325 of the Maryland code covers the Maryland State Arts Council appropriation.⁹¹ Introduced in 2013, promises that year on year, MASC shall not receive fund appropriations which are less than what was granted to the Council the year before, and also has a provision for increasing the budget when the general budget is itself increased. This in effect ring-fences arts funding and also means that it increases when the State’s expenditure increases.

Who Is Responsible: The Maryland State Arts Council (MASC) has the tagline “Advancing the Arts Across Maryland.”⁹² Their program includes supporting arts & entertainment districts throughout the state, an arts relief fund, creativity grants, Maryland traditions, public art, and much more.

What It Has Done: In 2023, Governor Wes Moore announced an investment in Maryland arts organizations through the State’s Arts Relief initiative. This equated to a \$40 million

⁹¹ Case Text, “Md. Code, State Fin. & Proc. § 7-325,” accessed December 20, 2023, <https://casetext.com/statute/code-of-maryland/article-state-finance-and-procurement/division-i-state-finance/title-7-appropriations/subtitle-3-unspent-balances/section-7-325-maryland-state-arts-council-appropriation>.

⁹² Maryland State Arts Council, “Homepage,” accessed December 20, 2023, <https://msac.org/>.

supplement to the Maryland State Arts Council’s annual appropriation, which in 2023 was \$28.9 million.

This led to:

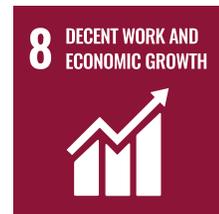
- 282% more operating grants
- 209% more grants to artists
- 164% more grants to organizations
- 55% more project grants⁹³

As of 2023, Maryland is second in the nation when it comes to per capita spending on the arts.

Relevance for Delaware: Maryland borders Delaware, and, due to its enthusiastic support of the arts, in one way represents a threat to Delaware’s ability to grow its own creative economy. However, it also presents an opportunity, as it demonstrates how a state in the same region of the country has successfully ring-fenced its arts budget and also encouraged political support of additional funding.

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.
- Target 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value.



⁹³ Office of Governor Wes Moore, “Governor Moore Announces Record Investment in Maryland Arts Organizations Through Arts Relief Initiative,” accessed December 20, 2023, <https://governor.maryland.gov/news/press/pages/governor-moore-announces-record-investment-in-maryland-arts-organizations-through-arts-relief-initiative.aspx>.

3.1.4.2. Recommendation 13: Expand Equitable Arts Funding

Action

Supporting Stakeholders: DAA Project Lead, Delaware Division of the Arts, Delaware Tourism, Delaware Division of Public Health, Delaware Department of Education, Delaware Division of Small Business, Municipal Governments

Goals:

- Increase transparency and accountability
- Address topics related to DEA&I
- Raise awareness of the creative economy and share knowledge across creative sectors
- Tackle issues related to geographic inequality

Timeframe: Short term (1-24 months)

Description: Future funding and support focused on creative economy development need to be guided by DEA&I principles and guidelines as outlined at the beginning of this action plan. Inspiration can be provided by the DDOA's existing guidelines concerning diversity and equity, but should extend across the creative economy, not solely to the arts. This is for the equitable development of the creative economy and an equitable arts & culture ecosystem. These guidelines should encourage them to consider aspects such as:

- Whether an applicant or project is based in a typically underserved community.
- Whether a project is being led (predominantly) by BIPOC or women.
- Whether a project is aimed towards young people in school districts with little or no arts education.
- Whether a project involves people engaging people living with disabilities in the arts and creative processes.

Based on these guidelines, a scoring system for institutions applying for public arts funding could include:

- Whether institutions pay a living wage to their staff.
- Whether they have sustainability plans in place, such as the reduction of single use plastics and the use of renewable energy.

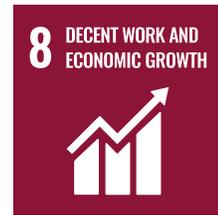
- Whether they have programs designed to engage people from underserved communities.

The DDOA's current efforts to ensure geographic parity in funding should be modeled.

Additionally, the Division of the Arts should initiate a new grant aimed specifically at BIPOC artists and practitioners working in various media. Further research can be undertaken to identify BIPOC-oriented grants which are available elsewhere. One such example is the [Black Pay Matters](#) program in Memphis, TN, whereby the Memphis Music Initiative has created a funding pool that supports 13 leaders with restricted grants (that they can only use to pay themselves) to meet a baseline salary of \$41,128 (the median Memphis metro area income for a single adult, per the U.S. Census Bureau).⁹⁴

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.



SUSTAINABLE DEVELOPMENT GOAL 9: Build Resilient Infrastructure, Promote Inclusive and Sustainable Industrialization and Foster Innovation

- Target 9.3: Increase the access of small-scale industrial and other enterprises, in particular in developing countries, to financial services, including affordable credit, and their integration into value chains and markets.



⁹⁴ Memphis Music Initiative, “Black Pay Matters,” *Call & Response*, accessed January 25, 2024, https://assets.website-files.com/62255744d123ca97812d7eb0/6238992fd746f2a945d8e3ce_MMI-CallandResponse.pdf, n.p.

SUSTAINABLE DEVELOPMENT GOAL 10: Reduce Inequality Within and Among Countries

- Target 10.3: Ensure equal opportunity and reduce inequalities of outcome, including by eliminating discriminatory laws, policies and practices and promoting appropriate legislation, policies and action in this regard.
- Target 10.4: Adopt policies, especially fiscal, wage and social protection policies, and progressively achieve greater equality.



3.1.5. Education

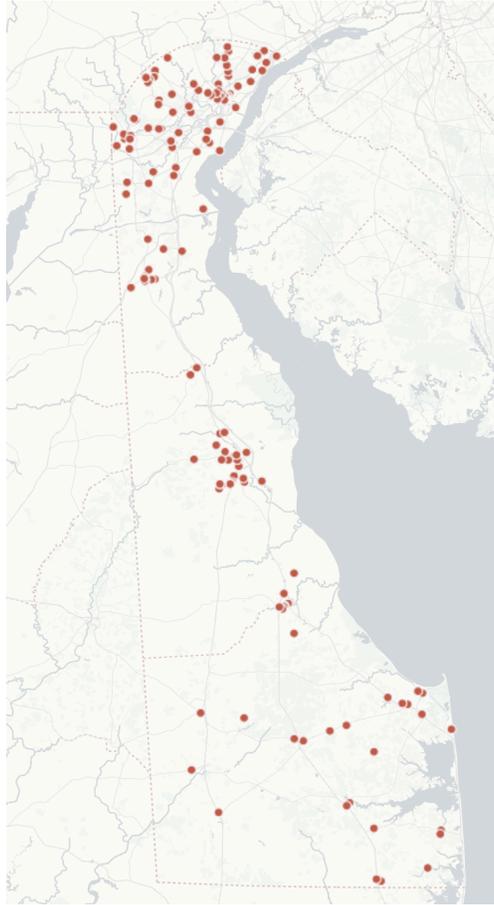
Many of the limitations in Delaware’s wider creative economy stem from an overall lack of prioritization given to the arts in primary and secondary education in the state, and improved arts education is needed in order to establish a thriving creative ecosystem. Robust arts education has many benefits for the wider creative economy and society at large: it creates the artists and audiences of the future, and provides general developmental cognitive and language skills. While arts education at the primary level follows national guidelines for public schools generally speaking, Sound Diplomacy’s stakeholder engagement and desk research found that arts education is not prioritized in schools and is not valued in the education system. This issue of valuation is reflected in the Delaware Arts Alliance educator survey, which highlights the importance of increased arts awareness and appreciation, and an increased connection between schools and industry/artists.⁹⁵

Cultural Education accounts for a significant contribution to Delaware’s creative economy overall.⁹⁶ There are many arts education institutions in the state, with Sound Diplomacy’s mapping finding that cultural education accounted for the fourth most present cultural subsector in the state, with a representation of 6% of the overall total assets. New Castle and Kent Counties, in particular, are well represented by cultural education institutions. Cultural education is the second largest cultural employer in the state (after Audiovisual & Interactive Media) with 1,681 jobs, an overall contribution of 16% to the creative economy and US\$193 million dollar output. Cultural education accounts for a location quotient of 1.07, indicating a local specialization in this industry.

⁹⁵ Neil Kirschling, email message to Sound Diplomacy, October 23, 2023.

⁹⁶ Sound Diplomacy’s asset mapping defines “Cultural Education” assets as those encompassing: conservatories and universities with cultural & creative programs or business programs for the cultural & creative industries; organizations that provide traineeships programs in the cultural & creative field; public and private schools with cultural & creative programs.

Figure 21. Cultural Education Assets, Mapping



Nonetheless, the employment LQ is considerably lower, suggesting that though there is a higher number of educational institutions, they employ fewer people than the national average. Sound Diplomacy’s economic impact analysis found that the majority of workers in the creative and cultural sector have obtained a higher education (55%) than the rest of the economy (50.6%). This combination of local specialization, below average employment, and heightened educational attainment, coupled with the contribution that cultural education makes to the creative economy, suggests a well-established sector that nonetheless needs more funding to shore up educational initiatives and increase the pool of arts educators in the state.

Funding

Perennial cuts to arts funding in schools significantly affect the quality and availability of arts education. Stakeholder engagement with educators in the state found that funding is a persistent challenge for arts education in schools, where even arts-integrated schools have to consistently deal with decreasing budgets and difficult austerity decisions over which services to offer

students. According to stakeholders, this issue with funding is tied to a larger problem with engaging the broader community to support arts education. Without a broad coalition of support for arts education in the state, it quickly becomes the subject that is first eliminated when purse strings need to be tightened.

Compensation for educators is also an issue. As highlighted by the Delaware Arts Alliance educator survey shared with Sound Diplomacy, 64% of respondents noted that they are expected to stay after contracted time for arts related events, concerts, rehearsals, clubs, etc., and 43% of those respondents indicated that they are not compensated at all for these activities. Additionally, the survey found that educators require increased access to resources like shared curriculum, financial resources, and classroom materials.

Standards and Access

Sound Diplomacy's survey analysis found that cultural and creative education was one of the lowest-rated sectors in terms of availability, though not in terms of quality. This suggests that while there are educational institutions of quality in the state, access is limited for myriad reasons. Stakeholder engagement indicated that there is less than equitable access to arts education in rural and traditionally marginalized communities and that geographic disparity of arts education access at the primary level in the state is a central issue. While major centers such as Wilmington offer many opportunities for integrated arts curriculum, field trips, etc., students in rural and remote areas across the state have a harder time accessing meaningful exposure to the arts both within and without the classroom. These findings are confirmed by Sound Diplomacy's asset mapping, which shows a dense concentration of educational assets in New Castle County, and fewer in Kent and Sussex counties. Additionally, the vast majority of these assets are not publicly accessible, further contributing to inequities in the state. All told, 84% of respondents found that education and diversity, equity, and inclusion would be positively impacted by an improved cultural economy. Respondents consistently highlighted the need for more arts-based education across all levels, and geographic concerns are exacerbated by a lack of clear standards for the arts in schools.

In 2016, the Delaware Board of Education adopted new standards for Visual and Performing Arts with emphasis on disciplines of focus such as music, media arts, theater, and visual arts. The standards focus on the creative process and highlight learning that includes creating, performing, responding, and connecting across disciplines. Despite these standards, however, in practice many of these disciplines (theater and dance in particular) are absent from school curricula. The Delaware Arts Alliance's Arts Education Data Project dashboard notes that, while music and the

visual arts have higher enrollment at 63% representing schools included in the project, every other discipline has 2% or less.⁹⁷

Not every school has a full-time arts educator on staff, and many schools do not have the space, budget, nor operational capacity to dedicate to arts education. Disciplines that are prioritized, such as music, are not done so out of an insistence on equitable exposure to the arts for all students, but because it serves an area that receives priority treatment in the state, namely football and sports education. This overall neglect of well-rounded arts education is tied to the primary mode of assessment in schools, as an emphasis on standardized testing outcomes squeezes the arts out of the picture and leaves very little room for approaches looking to integrate the arts with other subjects.

Arts Education Support

Sound Diplomacy's stakeholder engagement identified some organizations in the state working towards the betterment of equitable arts access for students. According to stakeholders from the education sector, efforts have been made recently to integrate literacy pedagogy into every aspect of primary education. The Delaware Institute for the Arts in Education delivers arts-integrated, multicultural experiences to students of all ages. The Delaware Arts Alliance supports a range of educational initiatives, including advocacy training to educators, and hosts the Delaware Arts Education Dashboard. The Delaware Division of the Arts offers professional development for art teachers, in-school artist residency grants, education resource grants for school programming and employs an Arts in Education Program Officer. The Red Clay Arts Alliance is a collaborative effort among six arts organizations in Wilmington that works towards enhancing the arts education access across the Red Clay School District. The Christiana Cultural Arts Center also serves as an important resource for the students of Delaware, offering them access to a diverse range of artists and art styles. Similarly, the Delaware Division of Historical and Cultural Affairs has a Curator of Education who develops programs related to this sector for K-12 students. The Curator is in charge of cultivating relationships between educators, school districts, State agencies, professionals, and organizations within the sector. The Delaware Art Education Association represents and serves the needs of Delaware's visual art educators by promoting arts education as an essential component of overall educational attainment. Regionally, the Joshua M. Freeman Foundation partners with schools in Delmarva to deliver arts programming at their Arts Pavilion in Selbyville. The Music School of Delaware is the only accredited, statewide music school, with locations in Wilmington and Milford.

⁹⁷ Delaware Arts Alliance, "Arts Education Dashboard," accessed January 12, 2023, <https://www.delawareartsalliance.org/resources/arts-education-dashboard/>.

Secondary Education

Though arts education is required at the primary level in Delaware, there is a lack of arts education access and meaningful guidelines for students at the secondary level, and especially those students from lower income backgrounds. As described above, this lack of equitable access is intimately connected with issues of geographic accessibility to arts education in the state. The emphasis upon standardized testing scores also described above is particularly pronounced in secondary education, where efforts to educate the “whole child” can be easily lost in favor of prioritizing SAT outcomes. There have been positive developments recently, with the Department of Education developing an idea to introduce a statewide Arts Seal to be awarded to secondary school students who participate in arts education and are looking to make a career in the creative economy.

Post-secondary Education

Post-secondary education poses an altogether different challenge in Delaware. There are institutions in the state offering programs related to the cultural industries, but there is an increased need for synergies between the programs and local employers/employment opportunities and increased mentorship. Over recent years, the amount of creative economy-relevant University level degrees available has fluctuated. While this is starting to improve again, these students are not closely tied with the local creative ecosystem. Focused support on the sector will work towards the Vision Coalition of Delaware’s (composed of Delaware-based educators, business and community leaders, and public officials) goal for 65% of Delawareans aged 18-24 attaining education greater than a high school diploma by 2025.⁹⁸

Nonetheless, a number of higher-education institutions in the state offer a variety of well regarded art-based programs. The University of Delaware has various arts and culture related programs, including an 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 (DSU), a historically Black university, offers various courses related to the cultural industries. This includes art education, digital media production, new media in arts, music, theater arts, and writing. DSU is currently expanding their creative economy adjacent courses, and have recently purchased the Schwartz Center Theater to support their arts programs. Overall, there is an increasing emphasis on associate degrees in the state, with the Delaware College of Art and Design leading the charge. Associate degree programs last two-to-three years and often include an experiential component, so they are less of a strain on time and resources as undergraduate degrees. These degree programs may offer avenues of

⁹⁸ Vision Coalition of Delaware, “Student Success 2025” (Newark, DE. 2015), 1-52:
<https://visioncoalitionde.org/wp-content/uploads/2016/12/StudentSuccess-2025.pdf>

increased mentoring, guidance, and internships for young creatives, elements that are, at present, organized on a mostly ad hoc basis.

Delaware Pathway Programs are provided by Delaware Pathways, which connects Delaware residents to educational and employment opportunities. At the time of writing, the only pathway with crossover into the creative economy is the Digital Communication Technology course. There is difficulty getting arts and culture adjacent topics and courses into the Pathways program, but would ultimately serve the development of more post-secondary arts education in the state. The DAA's survey confirmed the need for additional pathways programs, finding that 95% of educators surveyed agreed that "Delaware should place additional emphasis on career pathways in the arts to help students develop the academic, technical, and employability skills, and to gain the real-world experience needed for successful, in-demand creative sector jobs."⁹⁹

Conclusion

Arts education in Delaware is unevenly distributed and does not sufficiently support all students. Comprehensive arts education is essential for a robust and healthy creative economy, and is to the benefit of various other sectors and the Delawarean economy writ large. Secondary education students are particularly underserved in the state. Delaware is clearly home to a strong community of talented arts educators, however, and there is energy to support what arts education does exist and to improve opportunities and access across the board. Primary school aged students are provided for by national standards, and there are some opportunities at higher education for those wanting to further develop their interest in creative economy-adjacent fields. There is, however, a lack of a "pipeline" between students and careers/higher education, which results in the creative economy not being perceived as a worthwhile pursuit when it comes to professional development and higher education.

3.1.5.1. Recommendation 14: Secure Arts Funding for Every Student in Public Education

Policy

Supporting Stakeholders: Delaware Department of Education, Delaware Institute for the Arts in Education, Delaware Art Education Association, Delaware Division of the Arts, DAA Project Lead, Delaware Division of Libraries

Goals:

⁹⁹ Neil Kirschling, email message to Sound Diplomacy, October 23, 2023.

- Provide a more equitable public education system
- Address topics related to DEA&I
- Tackle issues related to geographic inequality
- Raise awareness of the creative economy and share knowledge across creative sectors

Timeframe: Long term (48+ months)

Description: The State should earmark a yearly budget for arts education, covering primary and secondary schooling. Inspired by California’s Prop 28 (see the benchmark case study provided below), such legislation should be weighted towards supporting schools in low income neighborhoods and also help schools cover administrative costs of implementing the budget. In the context of Delaware, an arts education budget should be targeted towards supporting:

- Students in public secondary education, i.e. aged 12-17
- Schools in underserved rural communities
- Multimedia arts, with a focus on audiovisual and digital arts
- Theater & music

This budget should be earmarked specifically for arts education, and should not be used to support the integration of arts techniques into other classes. While arts integration across the curriculum is critical, it will be important to not undermine the necessity of specialized, standalone arts education for the sake of increasing interdisciplinary education.

Schools would be able to use this additional funding to either support a full-time arts teacher, and/or, depending on the situation, use it to bring in freelancers or nonprofit arts education program providers to supplement the arts education they are already providing.

A secured arts education budget from primary through to secondary education will be necessary to ensure that all students are able to fulfill future arts education requirements for graduation (see [Recommendation 15](#)). Having stable and well distributed arts education throughout the state will engage many more people in the arts over a long term period, provide people with the skills they need to enter the creative economy, and therefore act as a strong foundation for an active and growing creative economy.

Implementation Considerations: An arts education working group could be developed by the Task Force (see [Recommendation 1](#)) to be in charge of designing the advocacy campaign for secure arts education funding, and decide where the additional finances will eventually go. Wherever possible and relevant, this should embrace arts education advocacy groups which are

already active in the state. What follows here is a sketch of how an advocacy campaign could be performed:

- Collate data collected via the Arts Education Data Project, the regulatory assessment and stakeholder engagement in this report, and the recent arts education survey conducted by Delaware Arts Alliance to create a document that outlines the state of arts education in Delaware, and the importance of improving it.
 - Continue to gather data on arts education, assess it annually, and communicate findings to the education community (including parents).
- Organize a campaign to secure equitable arts funding for Delaware’s public schools, including:
 - Propose a draft bill for an arts education policy in collaboration with key stakeholders and specialists.
 - Engage key stakeholders - from legislators, community leaders, educators, education advocates, parents, and students - to build a coalition that can support advocacy campaigns and share and input information from the broader Delaware community.
 - Create a compelling message that explains how improving arts education benefits students and the creative economy, how it improves cognitive and social skills, learning in other subjects, etc.¹⁰⁰
 - Action a public awareness campaign that encourages people to write to their legislators in support of securing funding for arts education.
- Whenever possible, mention these efforts to improve arts education to the wider creative ecosystem.
- **Diversity, Equity, Accessibility & Inclusion Imperatives.** When drafting and writing the proposed bill, include provisions that ensure:
 - Schools in deprived urban and rural school districts receive specific and ring-fenced funding. The Arts Education Data Project map which Delaware already participates in can be used to identify which districts require attention.
 - A wide array of artistic pursuits are allowed within the funding remit, so different mediums and genres of art and arts education are made available to students.

¹⁰⁰ Based on research such as e.g. Cristina Pacheco, "How Arts Education Fuels the Creative Economy," *PB Social*, March 6, 2015, <https://www.pbssocal.org/shows/artbound/how-arts-education-fuels-the-creative-economy>; Sarah Gonzales Triplett, "Arts Education is Essential to Cultivating the Creative Economy," *Americans for the Arts*, September 18, 2015, <https://blog.americansforthearts.org/2019/05/15/arts-education-is-essential-to-cultivating-the-creative-economy>.

Benchmark: California's Prop 28, US¹⁰¹

What It Is: On November 8, 2022, California voters approved Proposition 28: The Arts and Music in Schools Funding Guarantee and Accountability Act.

Proposition 28 requires the State, starting in 2023-24, to provide additional funding to increase arts instruction and/or arts programs in public schools. The amount required each year would equal 1% of the constitutionally required State and local funding that public schools received the year before. This funding will be considered a payment above the constitutionally required amount of funding for public schools and community colleges.

Proposition 28 distributes the additional funding to public schools based on enrollment in preschool and K-12. Of the total amount, 70% will go to schools based on their share of statewide enrollment. The remaining 30% will go to schools based on their share of low-income students enrolled statewide. Local governing boards may use up to 1% of this new funding for administrative expenses.

Austin Beutner, former Superintendent of Los Angeles Unified School District, and Arne Duncan, former U.S. Secretary of Education and former CEO of Chicago Public Schools, made this joint statement in relation to the proposition: "Only 1 in 5 public schools in California has a dedicated teacher for traditional arts programs like music, dance, theater and art, or newer forms of creative expression like computer graphics, animation, coding, costume design and filmmaking."

He went on to say that: "This initiative is timely as our country seeks to create a more just and equitable future for all children. A boost in arts and music education will help ensure the future workforce in media and technology properly reflect the diversity of the children in our public schools."¹⁰²

Who Is Responsible: Austin Beutner, former Superintendent of Los Angeles Unified School District, is the Proposition's author. The California Department of Education is in

¹⁰¹ California Department of Education, "Proposition 28—Arts and Music in Schools Funding," November 3, 2023, <https://www.cde.ca.gov/eo/in/prop28artsandmusicdfunding.asp>.

¹⁰² Ballotpedia, "California Proposition 28, Art and Music K-12 Education Funding Initiative (2022)," accessed November 6, 2023, [https://ballotpedia.org/California_Proposition_28_Art_and_Music_K-12_Education_Funding_Initiative_\(2022\)](https://ballotpedia.org/California_Proposition_28_Art_and_Music_K-12_Education_Funding_Initiative_(2022)).

charge of distributing funds. The Proposition passed in part due to the support from key stakeholders from the state's creative economy.¹⁰³

What It Has Done: As media has reported,¹⁰⁴ all the money must go to arts and music education, but that is broadly defined. The disciplines include (but are not limited to) dance, media arts, music, theater, and visual arts including folk art, painting, sculpture, photography, craft arts, creative expression including graphic arts and design, computer coding, animation, music composition, ensembles, script writing, costume design, film, and video. Each school community is invited to tailor the program to the needs of its students.

Schools with more than 500 students must use 80% of the funds on staff. This money must also be used to supplement existing funds, not supplant them. For example, if a school spends \$100 this year, they are expected to spend \$100 plus their new allocation in the following one.

Relevance for Delaware: While Delaware and California are very different in many ways, the situation in California regarding arts education provisions has many similarities with Delaware. Although the scale of the problem and solution may also be very different, Proposition 28 provides an example of how economy-wide support of arts education can lead to significant material changes. Additionally, the fact that this new funding has equity measures built into it, and also supports a very broad range of arts education and its disciplines, should be taken as a reference. What this Proposition does not deal with is insufficiencies in arts education at the secondary level, something that Delaware would want to include as part of any arts funding improvements.

SUSTAINABLE DEVELOPMENT GOAL 4: Ensure Inclusive and Equitable Quality Education and Promote Lifelong Learning Opportunities for All

- Target 4.7: By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including,



¹⁰³ Shawn Hubler, "How Hollywood Got Behind California's Prop. 28," *the New York Times*, November 2, 2022, <https://www.nytimes.com/2022/11/02/us/california-prop-28.html>.

¹⁰⁴ Karen D'Souza, "Proposition 28 a windfall for arts education, but implementation poses challenges," *Edsource*, June 26, 2023, <https://edsource.org/2023/prop-28-a-windfall-for-arts-education-but-implementation-poses-challenges/692858>.

among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture's contribution to sustainable development.

SUSTAINABLE DEVELOPMENT GOAL 10: Reduce Inequality Within and Among Countries

- Target 10.4: Adopt policies, especially fiscal, wage and social protection policies, and progressively achieve greater equality.



3.1.5.2. Recommendation 15: Make Arts Education Mandatory in Secondary Education

Policy

Supporting Stakeholders: Delaware Department of Education, Delaware Division of the Arts

Goals:

- Expand opportunities for professional development
- Raise awareness of the creative economy and share knowledge across creative sectors
- Provide a more equitable public education

Timeframe: Long term (48+ months)

Description: Some participation in arts education should be a requirement for graduation from secondary education in Delaware. This requirement will necessitate the introduction of secure arts education funding (see [Recommendation 14](#)) and will ensure that all students in public schools in Delaware have access to arts education of some kind throughout their school career.

This requirement would follow the lead from states such as New York, where students grades 9-12 are required to partake in a unit of visual arts and/or music, dance, or theater. In New York City, one unit of credit is the equivalent of approximately 108 hours of instruction by a licensed

arts teacher.¹⁰⁵ To achieve this change in graduation requirements at the statewide level, stakeholders from across the creative economy (not just arts education specialists, such as the proposed Task Force, see [Recommendation 1](#)) will need to be part of advocacy efforts, following a similar process as outlined in the previous recommendation.

As a short term precursor to this requirement, the Department of Education is already looking to introduce a State Arts Seal for students in secondary education. This will be a way to recognise those students who engage with the various disciplines associated with the arts. Sound Diplomacy recommends that the Seal could be called a Creative & Arts Skills Seal, to demonstrate the applicability of arts skills outside of the arts classroom.

Inspired by Arizona’s State Seal of Arts Proficiency (see the benchmark case study provided below), the Seal would be especially valuable if it is not only associated with the fine arts and crafts but also disciplines such as video editing, game design, web and UX design, photography, music production and engineering, etc. In addition, extracurricular activities such as volunteering at local community events, museums, and galleries and workshops, etc., should be taken into account. The Seal can lead the way for mandatory arts education in secondary education by demonstrating that students are interested in participating in arts education, and, when combined with improved career development opportunities (see [Recommendation 16](#)) and improved routes to internship programs (see [Recommendation 20](#)), that arts education is directly linked to professional development opportunities.

Diversity, Equity, Accessibility & Inclusion Imperatives:

- As stated in the previous recommendation, any efforts to require arts education at the secondary level (including the introduction of an arts seal) must remain cognizant of the fact that access to arts education will remain segregated based on regional, class, and racial lines, and that renewed efforts concerning secondary arts education should prioritize access for underserved communities first and foremost.

Benchmark: Arizona’s State Seal of Arts Proficiency¹⁰⁶

¹⁰⁵ NYC Public Schools, “Annual Arts in Schools Reports,” accessed January 24, 2024, <https://infohub.nyced.org/reports/academics/annual-arts-in-schools-reports>.

¹⁰⁶ New School for the Arts & Academics, “Arizona State Seal of Arts Proficiency,” accessed December 14, 2023, <https://www.aznsaa.com/azartsseal>.

What It Is: Active since 2019, the State Seal of Arts Proficiency is awarded to graduates in Arizona who complete minimum arts pathway requirements throughout their high school career.

To qualify, students must complete a Seal of Arts Proficiency Pathway and successfully graduate from an Arizona district public or charter school. Students' grades are reviewed periodically by the schools.

The requirements for qualification are:

- Meet with the designated Art Coordinator every quarter.
- All Visual Art students are required to participate in the national Portfolio Day.
- All Performing Arts students must participate in at least one community production.
- A final GPA of 3.0 or 4.0 in each qualifying arts/career and technical education (CTE) course.
- Obtain 4 minimum credit requirements in one of the following ways:
 - A minimum of 4 credits in one artistic discipline: (dance, music, theater, visual arts or media arts).
 - 3 credits in one artistic discipline, and 1 qualifying creative industries CTE credit or separate artistic discipline.
 - 2 credits in one artistic discipline and 2 credits in a qualifying creative industries CTE class or a separate artistic discipline.
- 80 hours of arts related extracurricular activities.
- Complete a student capstone project.

The five recognized artistic disciplines are music, dance, media arts, theater, and visual arts. Regardless of the discipline, the creative process is assessed across four metrics:

1. Creating
2. Performing/Presenting/Producing
3. Responding
4. Connecting

In regards to the extracurricular activities, students are required to participate in a minimum 80 hours of arts-related extracurricular activities.

The Pathway concludes with a Capstone Project, an Artist Statement, and a series of Senior Events, such as a graduation showcase or performance.

Who Is Responsible: Senator Paul Boyer sponsored the bill and Arizona Arts Education Advocates campaigned for it. The Seal is administered by the Arizona Department of Education’s Office of Arts Education, and has oversight from the State Board of Education. Schools are approved to award students the Seal.

What It Has Done: According to its goals,¹⁰⁷ the Seal:

- Celebrates students who demonstrate high levels of proficiency in the Arizona Arts Education Standards.
- Identifies pathways of artistic literacy that cultivate skills for success.
- Prepares students for college and career readiness, including active participation in the creative industries sector.
- Promotes increased access to well-rounded, high-quality arts education across the state.

Based on the map of participating schools provided by the Arizona Department of Education, more than 100 schools across the state are involved in the scheme, with students in Tucson, Phoenix and Yuma having the highest access to schools that award the Seal. The Arts Seal does not necessarily improve arts education access (Delaware boasts a higher overall arts enrollment rate than Arizona, though Arizona performs better at the high school level), what it does do is tie arts education to the broader educational conversation and higher education and professional opportunities.

Relevance for Delaware: Arizona’s Seal of Arts Proficiency is an exhaustive example of how students can be engaged more with arts education at the secondary level, and how arts and arts subjects can be celebrated and students can be driven to obtain additional skills throughout their high school careers. Delaware still needs to secure students’ arts education at the secondary level (see [Recommendation 14](#)) and also provide equitable arts education access for rural areas. In the meantime, and moving forwards, this program provides an effective example of how formal schooling and extracurricular activities can be recognized together and support student development.

¹⁰⁷ Arizona Department of Education, “Arizona State Seal of Arts Proficiency,” accessed December 14, 2023, <https://www.azed.gov/artseducation/arizona-state-seal-of-arts-proficiency>.

SUSTAINABLE DEVELOPMENT GOAL 4: Ensure Inclusive and Equitable Quality Education and Promote Lifelong Learning Opportunities for All



- Target 4.4: By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship.
- Target 4.7: By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture's contribution to sustainable development.

3.1.5.3. Recommendation 16: Improve Career Development Opportunities for Secondary Education Students

Action

Supporting Stakeholders: Department of Education, Delaware Division of the Arts, DAA Project Lead, proposed Task Force

Goals:

- Address topics related to DEA&I
- Raise awareness of the creative economy and share knowledge across creative sectors
- Provide a more equitable public education
- Tackle issues related to geographic inequality

Timeframe: Medium term (24-48 months)

Description: Students in secondary and non-university higher education require more opportunities to see the creative economy as a place for career development, see how their academic and technical education can tie in with these sectors, and be given the chance to network with stakeholders in the creative economy. In the context of Delaware, this situation can be improved by the introduction of annual career days for 15-24 year olds, and the founding of a mentorship program (for students for whom formal internships are not an option).

Career Fairs are a great way for students to not only learn about the different jobs and fields available to them, but also to speak to representatives about their experiences and have specific questions answered. Often, the creative arts are underrepresented at these events, and it is important that students learn about the different careers they can build within industries across the creative economy, from audiovisual to the books & press sector. Gaining insights into the intermediary roles that exist within these sectors (management, lawyers, booking agents, etc.) is also valuable both to the young people seeking opportunities but also to Delaware's creative economy in general, which will benefit from having more professionals and expertise. Inspired by the likes of [Seattle's City of Music Career Day](#),¹⁰⁸ Delaware's Creative Economy Career Day can be established for young people aged 15 years and older. There, young adults will be able to learn about different sectors and meet regional stakeholders.

A mentorship program for students in secondary education could be tied in with the State's Creativity & Arts Seal (see detail covered in [Recommendation 15](#)), and give students the opportunity to meet with individuals from different sectors in small groups, once or twice a year, during their last two years at school, with sessions overseen by a professional educator. Mentorship opportunities will provide students with:

- Insights into various creative industries, helping them explore potential career paths within the creative economy.
- Acquiring practical skills, knowledge, and real-world insights from experienced professionals in the creative economy.
- Networking opportunities that can open doors to internships, job shadowing, and other valuable experiences.
- Insights into experiences as entrepreneurs in the creative sector, providing practical advice on starting and sustaining creative ventures.

Initial steps to implement a mentorship program include:

- Defining the objectives of the mentorship program, including how it will be recognized by the State's school system and creative economy community.
- Work with stakeholders from across the creative economy to identify individuals to become mentors and develop a plan of action that they would be able to implement. The asset map may be deployed here to identify creative businesses that may have an interest in participating in the mentorship program.
- Meet with school leaders from various districts and conduct one on one interviews to ensure that there is the capacity to support such a mentorship program.
- Match mentors with mentees based on interests, career goals, and other relevant factors.

¹⁰⁸ City of Seattle, "City of Music Programs," accessed January 24, 2024, <https://www.seattle.gov/filmandmusic/music/city-of-music-programs>.

- Establish a system for monitoring and evaluating the effectiveness of the mentorship program.

Diversity, Equity, Accessibility & Inclusion Imperatives:

- Identify schools in underprivileged areas and ensure that students in these locations are targeted for mentorship programs and support. Ensure that mentors are representative of the wider community.

SUSTAINABLE DEVELOPMENT GOAL 4: Ensure Inclusive and Equitable Quality Education and Promote Lifelong Learning Opportunities for All



- Target 4.7: By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture’s contribution to sustainable development.

3.1.5.4. Recommendation 17: Advocate for More Pathway Courses and Associate Degrees Related to the Creative Economy

Policy

Supporting Stakeholders: Delaware Arts Alliance, Delaware Division of the Arts, the proposed Task Force. Department of Education, Delaware Pathways, University of Delaware, Delaware State University

Goals:

- Provide a more equitable public education system
- Expand opportunities for professional development
- Address topics related to DEA&I

Timeframe: Long term (48 months +)

Description: Delaware should 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. Pathway courses and associate degrees are two options for diversifying the higher education offering beyond standard university degrees and MAs.

Given that University graduates are currently over-represented in the creative economy, it should be a long term priority of those within the creative economy and the education sector to diversify the pool from which the economy draws from. This would also have the benefit of diversifying the makeup of the creative ecosystem itself, getting more people from low income backgrounds into work and careers. This is another positive from creating more options at the level of higher education.

Advocate for access for children, young people and adults to:

- **Associate degrees:** An undergraduate academic degree typically awarded by community colleges, technical colleges, and some four-year colleges and universities. They are designed to provide students with a foundation in a specific field of study or discipline and generally require about two years of full-time study to complete. Associate degree types that are relevant to the creative economy include Associate of Arts and Associate of Fine Arts. Associate degrees prepare students for careers, function as a transfer pathway for further higher education in the future, enhance skills, and also offer individuals flexibility when it comes to the time they have to dedicate to further schooling.
- **Professional pathways:** Often associated with career and technical education (CTE) programs. These pathways often incorporate a combination of education, training, and hands-on experience. Common career pathways that are aligned with the creative economy include the arts and humanities, social sciences, education, and media and communication. There are also multidisciplinary studies that can be tailored depending on the outcome the institution wants to achieve. Within this stream, there would be potential to develop a STEAM course for students who want to combine the “hard sciences” with creative practices, and vice versa.

This recommendation is complimented by others in this document. For example, such alternative higher education options could feed from the career advice and skills development that would result from the mentorship program (see [Recommendation 16](#)), and should be advocated for not just by stakeholders in the creative economy but also the wider business and economic development community.

As well as supporting producers, it will be important for these courses to also support the development of a stronger ecosystem of intermediaries in Delaware's creative economy. For example:

- Marketing and communication specialists with expertise in the creative industries.
- Artist and small business management.
- Event management and promotion.
- Audio and lighting technicians.
- Archives, cultural heritage, and the arts.
- Editing and publishing, both in print and digital.

There is already some provision of associate degree and pathway programs that are either fully related or adjacent to the creative economy in Delaware; this foundation can be the starting point for advocacy and developing a strategy for expanding access to creative economy education.

The business community also needs to be educated in the value that students from these courses would provide to their operations, and also be partners of programs, in order for students to be able to access internship and work experience opportunities. It can also be done formally, via targeted awareness campaigns distributed through these same networks, and also promoted via the Department of Education and other education bodies in the state.

Diversity, Equity, Accessibility & Inclusion Imperatives:

- These courses should be designed to match the needs of industry and the creative economy with the career goals and aspirations of students and adults looking to re-enter education. To that end, courses should be designed based on further stakeholder research that engages people, specifically women and BIPOC, who are currently underrepresented in Delaware's creative economy.
- Drawing from additional funding sources (see [Recommendation 12](#)), stipends could be provided to BIPOC and students from low income contexts who otherwise would not be able to afford to attend higher education.

Regional Considerations:

- Investigations should be made into the regional inequality that exists when it comes to higher education and accessing courses that prepare people for careers in the creative ecosystem.

- Drawing from additional funding sources (see [Recommendation 12](#)), stipends could be made available to support students who need travel funds to reach centers of education.

SUSTAINABLE DEVELOPMENT GOAL 4: Ensure Inclusive and Equitable Quality Education and Promote Lifelong Learning Opportunities for All



- Target 4.4: By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship.
- Target 4.7: By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture’s contribution to sustainable development.

3.1.6. Professional Development

There is an acknowledged need for more accessible and formalized professional development in Delaware’s creative economy. Professional development featured prominently in Sound Diplomacy’s survey analysis. Selecting the top three skills they would like to improve, respondents representing individual creatives and creative organizations identified marketing, social media, fundraising, business, and financial management as of primary importance for increased professionalization.

The survey analysis notes that the emphasis on business, financial management, and fundraising is significant in that it is typically provided by intermediaries working within the creative economy. This may indicate that there are not enough such intermediaries in the state, that they are not of sufficient quality, or that creatives would like to become more independent of the need for intermediary services. In terms of quality, certain cultural intermediary stakeholders, such as digital and physical distributors and producers, managers, booking agents, and local promoters all received low ratings in terms of reliance from individuals and organizations. Beyond reliance, it is most likely that this need speaks to both a lack of intermediary services and a desire on the part of creatives to facilitate the work themselves. Indeed, Sound Diplomacy’s mapping found that “Other Professional & Business Support” accounts for only 1% of the total cultural assets in the state. The mapping shows that these intermediary businesses are few and far between across the state, but with an unsurprising clustering in New Castle County. Overall, there is not enough awareness of industry standards in a wide variety of sectors, and creative business

services are lacking. Though this data does not provide a complete picture, it does confirm the need for increased professionalization in Delaware’s creative economy.

Spaces & Mentorship

The state’s arts community is passionate about championing arts in Delaware, maximizes every opportunity to do so, and there are various arts centers and groups located throughout the state. These tend to focus on a mix of providing extracurricular education, performances and events, creating a more equitable creative economy, and increasing public engagement with the arts. Amongst these centers are the Art Studio in New Castle County, the Sankofa Cultural Arts Center, the Inner City Cultural League and the Delaware Contemporary. Delaware is home to a wealth of talent and experience in a variety of cultural industries, and creators are willing and eager to share knowledge and experience, as evidenced by the Delaware Arts Alliance’s Arts Summit, and stakeholder engagement events and sessions.

This said, there are few organizations in the state that could facilitate regular professional development workshops, and there is a lack of formal mentoring or guidance programs available for young creatives. Similarly, internships are organized on an ad hoc basis. This reality reflects many observations collected during stakeholder engagement, where it was noted that a lack of professional development pipelines contributes to brain drain in the state. Stakeholders noted, for example, that there is a lack of spaces to learn about the business side of creative production, leading individuals to look out of state to develop these skills. Increased durational and professional mentorship and internship programs are needed to give creatives the opportunity to grow professionally in a sustainable and financially supported environment.

Conclusion

Though a number of stakeholders reflected positively on the role mentorship has had in their professional creative careers, and still others provided examples of extant internships programs in the state, Sound Diplomacy’s research shows that the need for developed professional development opportunities are well known throughout the creative ecosystem.

3.1.6.1. Recommendation 18: Host Professional Development Workshops and Lectures

Action

Supporting Stakeholders: Delaware State Chamber of Commerce, Delaware Black Chamber of Commerce, Delaware Arts Alliance, Delaware Division of the Arts, Proposed Task Force

Goals:

- Stimulate economic activity
- Address topics related to DEA&I
- Raise awareness of the creative economy and share knowledge across creative sectors

Timeframe: Short term (1-24 months)

Description: Organize a regular series of workshops and lectures featuring stakeholders located within and outside of the state. Consider engagement with stakeholders from nearby urban and cultural centers such as Philadelphia and Washington D.C. to promote Delaware as a state with an active cultural scene.

Workshops can be in-person, but streamed/recorded for greater access, or fully online. In all instances, accessibility considerations should be taken into account. The proposed Task Force and working groups should be utilized to supply ideas and speakers. Related to various sectors, local branches and representatives of organizations such as the American Federation of Musicians, ASCAP, International Alliance of Theatrical Stage Employees, Producers Guild of America, etc., should be points of contact.

Based on our research, key themes to focus on in the immediate future include:

- Marketing and “branding” of artists, especially in relation to social and new media.
- Online advertising and SEO.
- Tutorials on applying for arts grants, both regionally and nationally.
- Diversifying income streams, i.e. from crowdfunding, Patreon model, etc.
- Industry standards across all sectors, with a focus on when artists work with businesses on marketing campaigns, etc.
- For the music performance sector, lessons around the work of intermediaries such as booking agents and managers.

As well as skill and knowledge enhancement, other benefits to supporting professional development in this way include:

- Creating networking opportunities
- Motivating and engaging residents involved in the creative economy
- Ensuring that the local creative community is aware of trends and best practices
- Talent attraction and retention

Diversity, Equity, Accessibility & Inclusion Imperatives:

- Wherever possible, English/Spanish bilingualism should be accounted for, i.e. with Spanish subtitles added to videos and Spanish-language versions of documents made available.
- A sign language interpreter should be provided whenever necessary.
- Workshop venues should be accessible to everyone.
- Speakers and guests should represent the whole community, and special attention should be paid to female and BIPOC representation.
- Host at least one workshop that focuses specifically on DEA&I within the creative economy and the arts.

Regional Considerations:

- Rotate the location of in person workshops between the three counties. The asset map may be used to identify novel and appropriate spaces for these workshops.

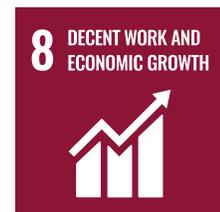
SUSTAINABLE DEVELOPMENT GOAL 4: Ensure Inclusive and Equitable Quality Education and Promote Lifelong Learning Opportunities for All

- Target 4.4: By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship.
- Target 4.7: By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture's contribution to sustainable development.



SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity



and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.

3.1.6.2. Recommendation 19: Improve Professionalization Related to Copyright and IP with the Support of Legal Professionals

Action

Supporting Stakeholders: Delaware Arts Alliance, Regional experts in copyright law and IP, Proposed Task Force, Regional creative economy stakeholders with expertise in copyright law, Widener University Delaware Law School

Goals:

- Expand opportunities for professional development
- Provide a more equitable public education

Timeframe: Short Term (1-24 months)

Description: Increased professionalization efforts related to copyright and IP are needed across the creative economy in Delaware. Copyright and IP is central to the creative industries; it is where a large amount of the monetary value produced across all sectors in the creative economy arises from. Understanding copyright and IP is important for stakeholders to be able to protect their work and also know what rights they have. In some sectors, such as music, the licensing of rights can be long term sources of passive income that can support an artist and intermediaries throughout the sector.

Because of this, it will be important for Delawareans to be educated in copyright law and IP. Such education will need to be provided by specialists and could be delivered via a special annual conference/event on the topic. In addition, more direct support in the form of pro bono work, such as that supplied by the Ella Project (see the below benchmark case study), would also increase the maturity of knowledge when it comes to industry standards and exploring innovative business opportunities. Partnering with a regional law school such as Widener University could be mutually beneficial, in that it provides local artists and aspiring professionals pro bono legal advice, and students opportunities to apply their education.

Given their specificities, each of the sectors covered in the creative economy will need to be treated individually. A resource summarizing the basics of copyright and IP law for each sector should be written by a professional and made available via DelawareScene (see [Recommendation 25](#)), and should also be available in Spanish.

Diversity, Equity, Accessibility & Inclusion Imperatives:

Access to pro-bono legal work concerning this topic should prioritize individuals early in their careers who may not have otherwise had access to someone practicing entertainment/culture law. In order to ensure the accessibility of the annual conference/event described above, a concurrent livestream should be produced with permanent access provided to those who are unable to attend. Similarly, pro-bono advising sessions should also be offered online for those unable to attend in person.

Benchmark: The Ella Project, USA¹⁰⁹

What It Is: The Ella Project is an independent nonprofit organization, founded in 2004, that aims to support the arts and culture of New Orleans and Louisiana by providing pro bono legal support, business assistance, and advocacy for the cultural community.¹¹⁰

The Ella Project offers pro bono legal services to low- to moderate-income artists and musicians. These legal services are provided by the project's co-founder Ashlye Keaton and a team of Tulane Law students. They provide weekly legal clinics by appointment and direct, one-on-one assistance on issues such as copyright, trademark, business formation, contract preparation, negotiation and review, licensing, and estate planning.¹¹¹ Appointments can be booked easily online through an online form on the website.

For individual artists, there is a one-time application fee of \$25 which can be paid at the end of the application. Alternatively, artists can join as a member for \$60 and receive access to legal services for 12 months. For organizations, there is a one-time \$50 application fee for legal services.

In addition, the Ella Project “seeks to advance proactive, progressive ideas where culture and creativity intersects with public policy.”¹¹² The Ella Project advocates for the City and State to:

¹⁰⁹ Ella Project, “Homepage,” accessed March 6, 2023, <https://ellanola.org/>.

¹¹⁰ Ella Project, “About,” accessed March 3, 2023, <https://ellanola.org/our-mission>.

¹¹¹ Ella Project, “Services,” accessed June 12, 2023, <https://ellanola.org/services>.

¹¹² Ella Project, “Advocacy,” accessed June 12, 2023, <https://ellanola.org/advocacy>.

- Facilitate public performance and reduce the need for performance spaces to justify their existence to regulators.
- Create a Night-time Management Office and de-emphasize police in all areas of regulation.
- Increase arts funding.
- Ensure creatives are able to exercise their copyrights in a clear and equitable way.

In order to accomplish these ideas, as well as support creatives and arts businesses, the Ella Project works to bring New Orleans politicians and policymakers together with national leaders of progressive cultural policy and hosts candidate forums and policy briefings on cultural policy.

Who Is Responsible: The project was co-founded by lawyers Ashlye Keaton and Gene Meneray, and is partnered with the local Tulane Law School, where Keaton is an adjunct professor.

What It Has Done: The Ella Project serves 250+ pro bono legal clients a year in matters of copyright, trademark, patent, contract negotiation, licensing, and for and nonprofit incorporation.¹¹³

In 2019, to encourage more artists to take advantage of its copyright services, the Ella Project collaborated with the New Orleans Business Alliance to supply \$55 mini-grants to artists who wanted to attend a copyright workshop. The Ella Project then handled filing the registration pro bono, so the artists received their copyright without having to pay legal fees or registration fees.¹¹⁴

The Ella Project also runs Tête-à-Tête, a peer-to-peer consultancy network designed to provide valuable, personalized business development resources to early- and mid-career artists.¹¹⁵ Tête-à-Tête facilitates mentoring sessions with experienced, well-established artists equipped to provide guidance and share their expertise. Tête-à-Tête features an online drop-down menu with categories of advice such as arts administration, music, media, visual arts, and theater, and all available consultants, their qualifications and fees. Consultants set their own rates and keep 100% of the fees.

In 2022, the Ella Project presented an eight-week, intensive music business course in partnership with the New Orleans Jazz Museum and the Arts & Business Council of

¹¹³ Ella Project, "About," accessed January 25, 2024, <https://ellanola.org/our-mission>.

¹¹⁴ Copyright Alliance, "Five Questions With The Ella Project," accessed January 25, 2024, <https://copyrightalliance.org/five-questions-with-the-ella-project/>.

¹¹⁵ The Ella Project, "The Ella Project's Tête-à-Tête," accessed June 12, 2023, <https://www.ellateteatete.org/>.

Greater Boston called Crescendo. All sessions were presented live at the New Orleans Jazz Museum and ran consecutive Tuesdays at 5:30 p.m. Artists could pick and choose sessions and there was no attendance fee. Topics included copyright, publishing, royalties, labels, contracts, etc. The course was partially funded by the National Endowment for the Arts (NEA) which awarded the Project with \$25,000 from the Grants for Arts Projects.¹¹⁶

The Ella Project also provides information on other legal resources in the region and provides occasional professional development workshops, forums and webinars.

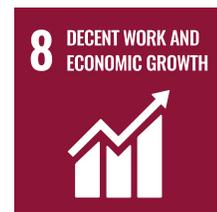
Relevance for Delaware: The Ella Project shows how Delaware could create more connections between its legal community and the creative economy, in order to foster greater application and knowledge of copyright and IP issues related to every sector of the creative economy.

SUSTAINABLE DEVELOPMENT GOAL 4: Ensure Inclusive and Equitable Quality Education and Promote Lifelong Learning Opportunities for All

- Target 4.4: By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship.
- Target 4.5: By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations.



SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All



¹¹⁶ Off Beat, “The Ella Project Receives Grant Funds From National Endowment For The Arts,” 2022, <https://www.offbeat.com/news/the-ella-project-receives-grant-funds-from-national-endowment-for-the-arts/>.

- Target 8.2: Achieve higher levels of economic productivity through diversification, technological upgrading and innovation, including through a focus on high-value added and labour-intensive sectors.
- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.
- Target 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value.
- Target 8.6: By 2020, substantially reduce the proportion of youth not in employment, education or training.

SUSTAINABLE DEVELOPMENT GOAL 10: Reduce Inequality
Within and Among Countries

- Target 10.5: Improve the regulation and monitoring of global financial markets and institutions and strengthen the implementation of such regulations.



3.1.6.3. Recommendation 20: Formalize Creative Economy Internships

Action

Supporting Stakeholders: Delaware Technical Community College, Delaware State University, University of Delaware, Proposed Task Force, Delaware Division of the Arts, Delaware Arts Alliance, Arts organizations from throughout the state

Goals:

- Expand opportunities for professional development
- Address topics related to DEA&I
- Provide a more equitable public education

Timeframe: Medium term (24-48 months)

Description: Internships are a typical feature of early career development in the creative industries. Formalize the internship process in a manner similar to how job opportunities are currently listed on DelawareScene to help make internship opportunities more equitable and accessible, and encourage students and recent graduates to pursue professional opportunities within the state.¹¹⁷ This recommendation should be seen as a natural development from increased professional development support in secondary education (see [Recommendation 16](#)).

A possible internship structure could be:

- 3-6 months in length
- Up to part-time hours

Paid/remunerated internships within the state would have numerous benefits. These include providing people entering an industry or sector with their first extended experience in a professional setting, help to retain talent, give Delawareans opportunities to develop new skills and gain experiences, increase employability, and create a more productive and innovative economy.

Implementation Considerations:

- Using Sound Diplomacy’s mapping and local knowledge, identify businesses based in the state and in neighboring cities that have the capacity to offer internship programs.
- Partner with Delaware’s universities to make sure internship opportunities are aligned with courses and academic programs.
 - Identify where internships are already required and how these are usually managed.
 - Develop standards, protocols, monitoring processes, etc., for managing creative economy internships. Standards can probably be borrowed from existing internship programs running for other parts of the economy.
 - Generate a streamlined method for assessing internship programs, so that they are valuable both to the business and the student.
- Gather feedback specifically from young people about what they seek and need from extended work experience, and what barriers they have to gaining professional experience.
- Create a portal as part of DelawareScene that lists internship opportunities by region, sector, length, etc.

¹¹⁷ DelawareScene, “Arts Jobs,” accessed January 2, 2024, <https://delawarescene.com/jobs/>.

- Create a “Golden Opportunity” seal of approval, or something similar, provided by the Department of Education, which marks participating organizations that pay a minimum wage to their interns as being good employers for interns (this could be tied in with the fair pay guidelines, see [Recommendation 7](#)).
- Make sure that these internship opportunities are brought to the attention of students on career days (see [Recommendation 16](#)).
- Utilize the proposed Task Force and working groups to make sure that the platform is populated, and also that stakeholders from across the economy are aware that the platform exists.
- Host a yearly alumni meet-up to keep people in contact and facilitate ecosystem development opportunities in an informal manner.
- **Diversity, Equity, Accessibility & Inclusion Imperatives:**
 - Provide a stipend that supports people from low income backgrounds to partake in an internship.
 - Monitor the accessibility of these programs for people with different educational or accessibility needs and requirements.
 - Monitor how well-distributed internships are between women and different ethnicities. Candidates should not be discriminated against based on their gender or race. Assess regularly, and if inequalities are shown, propose solutions
- **Regional Considerations:**
 - The aforementioned stipend should include support for travel expenses, including that involving the use of a personal automobile.

SUSTAINABLE DEVELOPMENT GOAL 4: Ensure Inclusive and Equitable Quality Education and Promote Lifelong Learning Opportunities for All

- Target 4.4: By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship.
- Target 4.7: By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture’s contribution to sustainable development.



SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All



- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.

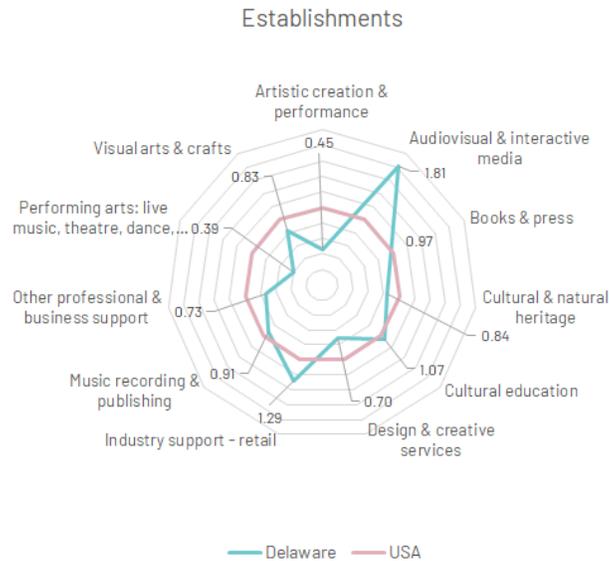
3.1.7. Infrastructure Development

Sound Diplomacy’s mapping showed that artistic creation & performance assets account for only 9% of all creative economy assets in the state, while books & press and performing arts both account for only 8%. Such low figures suggest that many Delawareans will simply not be in comfortable distance to assets in these sectors. In addition, a majority (51%) of assets are concentrated in New Castle County. Sussex County has 31%, and Kent County 18%. So, not only is access limited, it is also geographically unbalanced.

When we look at the location quotient for establishments, Sound Diplomacy found that Delaware performs below the national average for assets across numerous sectors (see Figure 22):

- Artistic creation & performance
- Books & press
- Cultural & natural heritage
- Design & creative services
- Music recording & publishing
- Other professional & business support
- Performing arts
- Visual arts & crafts

Figure 22. Location Quotients Delaware, Economic Impact Assessment



This lack of physical infrastructure is recognised by stakeholders within the state. During roundtables, stakeholders involved in the performing arts and music highlighted a lack of spaces for rehearsal or workshops. This perception was reinforced via the survey, where, amongst respondents, 41% of creatives and 43% of organizations expressed a desire to see government co-finance or support the development of infrastructure for exhibition.

Public Transport

Alongside building, transportation is a major foundational type of infrastructure which impacts not only the creative economy but the broader economy in general. The increased provision of public and multimodal transport options (such as bikes) is a common topic in cities across the world. However, our research found that public transport limitations are restricting Delaware’s potential. There is a lack of evening public transport and, in some places, no links at the weekend. While there are plans to implement bike lanes and more pedestrian areas in places such as Wilmington, at present downtown areas are continuing to decline in popularity and footfall. And while public transport is limited, not everyone has constant access to a car. The result is that generally speaking, as stakeholders said, it is challenging to get people to travel to different parts of the state for events and programs.

As our economic impact assessment found, there is a significant income disparity between white individuals and their Black peers. Meanwhile, we found that women are underrepresented in Delaware’s creative economy (there is 49.4% female representation in the general workforce but only 35.0% in the creative economy). Furthermore, 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, where men earn 25.2% more. As we know from research conducted elsewhere, infrastructure such as public transportation disproportionately impact Black people and women,¹¹⁸ and transportation inequalities reinforce structural racism and keep minorities and historically marginalized people excluded from economic opportunities.¹¹⁹

Integrating Arts Infrastructure

We know from our literature review that, at present, beyond a handful of small scale public art concepts, Downtown Development Plans are not seeking to secure people sufficient access to cultural activities, and that arts and culture are largely missing from these plans. Stakeholders report that what cultural activities have been planned for at new developments have not materialized, and also that developers have even been antagonistic towards arts projects that assist disadvantaged people, such as the unhoused.

There is, however, interest at the governmental level to see how the creative sector and artists could be part of holistic efforts to generate solutions to housing shortages and decreased activity in downtown areas. And while the Downtown Development Plans do not promote the creative economy as fully as they could or should, their existence does at least reflect an appetite to think strategically about urban development and also to upgrade infrastructure and opportunities for economic growth in historic downtown areas.

There are various previously discussed arts centers and groups located throughout the state that are already providing access to arts infrastructure to people throughout Delaware. These tend to focus on a mix of providing extracurricular education, performances and events, creating a more equitable creative economy, and increasing public engagement with the arts. As far as Sound Diplomacy understands it, there is not much formal communication or collaboration between organizations and major institutions (this is why discussions around urban regeneration and great statewide collaboration are essential, see [Recommendation 1](#)).

Despite complaints about the “Delaware way” leading to opportunities being missed, Delaware’s manageable size should be an advantage, and encourage engagement with its urban centers and transit across its length and breadth throughout the year. Improving physical and transit infrastructure will be imperative for cultivating a creative economy that can attract and retain talented professionals, and is also vital for establishing a more equitable ecosystem.

¹¹⁸ Mouchka Heller, "Why the next step for antiracism is transportation," *World Economic Forum*, April 22, 2021, <https://www.weforum.org/agenda/2021/04/transport-us-antiracism/>.

¹¹⁹ Jackie Powder, "For Blacks and Other Minorities, Transportation Inequities Often Keep Opportunities Out of Reach," *Hopkins Bloomberg Public Health*, September 8, 2020, <https://magazine.jhsph.edu/2020/blacks-and-other-minorities-transportation-inequities-often-keep-opportunities-out-reach>.

Conclusion

Delaware underperforms in terms of employment of various sectors when compared to the national average. That is why a vast majority of the recommendations throughout this action plan are oriented towards stimulating job growth and professionalization. However, as the above information shows, Delaware also has an issue with underdeveloped civic infrastructure which will act as the foundation for any improvements or growth in quality employment, target sectors, and its mission to become a place that attracts cultural tourists. While building new infrastructure presents many challenges, and Delaware might not be in a position right now to embark on such tasks, it should be possible to seek to repurpose underused and abandoned spaces, especially in downtown areas while rejuvenation in those spaces is a prominent part of the conversation in the state. In addition, tackling the equitable transportation crisis will be vital for expanding a fair and accessible creative economy in Delaware.

3.1.7.1. Recommendation 21: Identify and Promote Spaces for the Creative Economy

Policy

Supporting Stakeholders: Office of State Planning Coordination, regional Departments of Land Use and Planning, Proposed Task Force and working groups, Delaware Division of the Arts, DAA Project Lead

Goals:

- Stimulate economic activity
- Address topics related to DEA&I
- Tackle issues related to geographic inequality

Timeframe: Long term (48 months +)

Description: In Downtowns, deindustrialized areas and rural communities, there are unused or underused spaces that could be repurposed and used as workshops, pop-up retail units and office space for individuals, organizations and businesses in the creative economy. For the arts and creativity to thrive, and for innovative and engaging creative economy businesses to succeed, those in the creative ecosystem must have equitable access to space and equipment. 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.

This would benefit long term placemaking efforts, make the local creative economy more inclusive and more inviting for out-of-state residents to engage with. Although this topic is raised in connection to Creative Hubs (see [Recommendation 2](#)), this recommendation is tailored towards supporting both for- and nonprofit private enterprises, rather than a space more dedicated to networking, professionalization and education

Implementation Considerations:

A collaborative effort involving the Task Force (see [Recommendation 1](#)), the proposed working groups, Downtown Development groups, and statewide and regional offices that are responsible for land use and planning, should:

- Using Sound Diplomacy’s mapping and other research, identify the types of individuals and organizations which are lacking access to space.
 - Create a wishlist of the types and locations of spaces which would meet these needs.
- Investigate different models for repurposing un- and underused spaces, those that involve private organizations (such as the Community Arts Stabilization Trust, detailed in the benchmark case study below), and those which are driven by public bodies (such as Seattle’s Cultural Space Program, detailed in the benchmark case study below).
- Create a set of achievable KPIs which the program will aim to achieve.
- Collaborate with municipalities and landlords to ascertain which approaches could work best, and the potential vacant properties in downtown, suburban and rural areas have the potential to be repurposed.
- Identify a potential area/location and perform a pilot program.
- In partnership with regional councils, address any zoning laws or restrictions which may hinder any such plans.
- Give a statewide office responsibility to introduce and manage the agreed upon program, and to engage any local and national organizations which can assist with its implementation.
- Monitor and periodically assess the program, to make sure it works and see how it can be improved.
- **Diversity, Equity, Accessibility & Inclusion Imperatives:**
 - Urban development and regeneration projects are often accused of displacing local communities, especially those from historically marginalized communities. Future development schemes with a cultural aspect should have a quota for community engagement and access which is enforceable, and permanent or long-term vacant space should also, in the first instance, be made affordable and available to women and BIPOC-led organizations and businesses.

Benchmark: Community Arts Stabilization Trust, US¹²⁰

What It Is: The Community Arts Stabilization Trust (CAST) describes itself as a real estate organization that centers around community and helps to ensure the stability of the arts and artists in the neighborhoods where they live and work. Based in San Francisco, CAST models new ways to secure and steward affordable, inclusive spaces that are oriented around cultural and creative expression. It was founded in 2013 as a response to the issue of nonprofits and artists no longer being able to afford to stay in the Bay Area.

CAST helps people and organizations based in their local communities in two major ways:

- It provides experience, financial resources, and partnership to achieve goals that would otherwise be more challenging, particularly real estate outcomes, for its community-based partners.
- It supports building teams to ensure that cultural and community facilities are embedded in real estate developments.

There is no formal application process for acquiring CAST's help, but it does focus on arts organizations and artists facing immediate displacement, as well as also considering how community-embedded a project is, how innovative it is, and if it is women and BIPOC-led.

To ensure a space remains an arts and culture asset in perpetuity, CAST maintains a 1% asset management interest in the operating agreement of a building purchased using its help and resources. This allows CAST to preserve and enforce the ongoing arts and cultural use so the building can not be sold to anyone other than a nonprofit arts organization in the future.

Who Is Responsible: CAST has 13 members of staff, 3 consultants and 6 board members, whose experiences span the cultural, investment and real estate development industries. Funding for projects has come from Chase, the San Francisco Community Investment Fund, and the Kenneth Rainin Foundation, amongst others. It can also act as a manager of properties owned by Bay Area-based cultural groups.

What It Has Done: CAST's programs and services have helped arts organizations build pathways to ownership, enabled artists to secure long-term affordable leases, and created dedicated spaces for cultural activity.

¹²⁰ CAST, "About Us," accessed January 2, 2024, <https://cast-sf.org/about-us/>.

In 2022, CAST opened the historic Dempster Building at 447 Minna Street in San Francisco to the local creative community, with a focus on Filipino arts and community-based organizations. The building offers affordable workspace (performance, exhibition, meeting and office spaces) to arts and culture groups ranging from youth arts and music education. It has been working to support the growth and development of Black owned cultural businesses in the city.¹²¹

The organization has also conducted research. In July 2020, it released a COVID-19 Impact Survey, which collected data on the early economic and physical space impacts on the local Bay Area arts sector resulting from the pandemic. The research was used to encourage further support for the area's creative economy.

Relevance for Delaware: CAST provides an example of how a group combining the cultural and development sectors can work to secure space for cultural exchange and creative economy expansion and innovation. It shows how the creative economy can become a core part of downtown and urban redevelopment, utilizing empty spaces and empowering members of the local community to sustain and grow the local economy and creative scene. This is the sort of project that could be cultivated from increased interdisciplinary work and engagement with the broader business community.

Benchmark: Cultural Space Program, US¹²²

What It Is: The City of Seattle has created a special division to work with artists, arts organizations, developers and builders to manage and support cultural spaces, allocate grants and activate unused or underused spaces. The website hosts links to resources across other city departments, such as information on building codes, noise codes, fire safety codes, financing, administrative services and incentives. There is also a comprehensive and clearly written handbook available for artists and arts administrators to use to help them navigate how to lease, purchase or operate a cultural space in the city.

Who Is Responsible: The Cultural Space program is headed up by the city's Office of Arts and Culture, which has a dedicated 'cultural space liaison' with the office to work

¹²¹ CAST, "Big Win for Black Owned Real Estate & Black Artists in Oakland," May 11, 2023, <https://cast-sf.org/big-win-for-black-owned-real-estate-black-artists-in-oakland/>.

¹²² City of Seattle, "Cultural Space," accessed January 25, 2024, <https://www.seattle.gov/arts/programs/cultural-space>.

alongside the ‘arts permit liaison’ at the city’s Department of Construction and Inspections.

What It Has Done: One of its biggest accomplishments to date was the introduction of SpaceFinderSeattle.org.¹²³ Launched in 2015 and free to use, this website is a database compiling 443 rental space listings in the region (as of January 2024) that are available for artists, community organizations and cultural entities to use for meetings, events, workshops, rehearsals, performances and presentations.

Relevance for Delaware: Creating an online database and program similar to Seattle’s Cultural Space Program is one way to expand the amount of dedicated spaces available for creative economy participants while also increasing the access that marginalized communities have to these spaces and beginning the process of creating healthier environments founded on sustainable principles for these same communities.

SUSTAINABLE DEVELOPMENT GOAL 11: Make Cities and Human Settlements Inclusive, Safe, Resilient and Sustainable

- Target 11.3: By 2030, enhance inclusive and sustainable urbanization and capacity for participatory, integrated and sustainable human settlement planning and management in all countries.
- Target 11.4: Strengthen efforts to protect and safeguard the world’s cultural and natural heritage.



3.1.7.2. Recommendation 22: Support Access to Increased Public Transportation in Delaware

Policy

Supporting Stakeholders: State of Delaware, Delaware Department of Transportation

¹²³ Spacefinder Seattle, “Home,” accessed January 24, 2024, <https://www.spacefinderseattle.org>.

Goals:

- Stimulate economic activity
- Address topics related to DEA&I
- Tackle issues related to geographic inequality
- Create opportunities for a richer tourism offering
- Work toward a sustainable future

Timeframe: Long term (48 months +)

Description: Public transport plays a crucial role in urban and regional transportation systems, offering a wide range of benefits for individuals, communities, and the environment. The State of Delaware, regional and city/town councils, and the Department of Transportation should conduct research into the current state and impact of public transport, collecting data on what residents would like to see from public and multimodal transport infrastructure, and from there put a strategic plan in place for improving public transport across the state. If research is already underway or being planned, then it should be expanded to include input from those in the creative economy, especially those in the performance and event sectors.

Research should pay special attention to how cultural institutions and cultural tourism would like to see the state's transport provisions improved, the proposed working groups and stakeholders from key institutions from across the state should be engaged in roundtable sessions to get their thoughts on this issue.

Consideration of this topic could see the following benefits (both general and specific to the creative economy):

- Reduction in traffic congestion.
- Reduction in pollution.
- Reduction in the need for parking infrastructure.
- Facilitates cultural exchange and collaboration amongst people through increased options to reach each other.
- Accessible and affordable travel to make the creative economy more equitable and accessible, connecting regions within the state.
- Increased audience engagement through easier access to cultural events.
- Reduction in drink & drive incidents.
- Increased footfall in downtown areas, and urban regeneration, particularly at weekends.
- Enhanced appeal for areas in the state as creative tourism destinations through well-connected transport systems.

- Transit stations and vehicles provide spaces for public art installations and advertisements about local cultural activities and resources, creating opportunities for artists to showcase their work to a diverse audience.

Public transport has become a significant topic nationally recently in relation to the creative economy and urban regeneration more broadly. A recent strategic plan from the City of Memphis places emphasis on increasing multimodal transport as part of the holistic strategy towards transforming the city as it approaches its 300th birthday.¹²⁴ Elsewhere, researchers in Miami have identified increased public transportation as being key to the city growing its creative economy and continuing to attract business conferences, creatives and audiences from all over the world and the country.¹²⁵

Diversity, Equity, Accessibility & Inclusion Imperatives:

- Any improvements or changes to public transportation should be assessed using a framework, such as the Urban Mobility Scorecards Initiative, which is a tool for evaluating a cities’ progress on sustainable and inclusive mobility.¹²⁶

Regional Considerations:

- Public transportation should be designed to better connect those that live within the south and also the south to the north of the state. Rural alienation from urban centers and the disconnect between the south and the north of the state should be addressed in any changes to the public transportation system.

SUSTAINABLE DEVELOPMENT GOAL 9: Build Resilient Infrastructure, Promote Inclusive and Sustainable Industrialization and Foster Innovation

- Target 9.1: Develop quality, reliable, sustainable and resilient infrastructure, including regional and transborder infrastructure, to



¹²⁴ The City of Memphis Memphis and Shelby County Division of Planning and Development, “Memphis 3.0 Comprehensive Plan,” April 20, 2021,

https://100a0d59-51a0-4e58-a4fe-68ac607f7fbc.usrfiles.com/ugd/100a0d_7b357dc2d7764d988d9c5a3c58b3b0f4.pdf

¹²⁵ Richard Florida and Steven Pedigo, "Stuck in Traffic: For Greater Miami to Become a Leading Startup Hub, Better Mobility Is a Must," Florida International University, 2019,

<https://digitalcommons.fiu.edu/cgi/viewcontent.cgi?article=1001&context=mufi-reports>.

¹²⁶ World Economic Forum, "Urban Mobility Scorecards Initiative," accessed January 15, 2024,

<https://sustainable-infrastructure-tools.org/tools/urban-mobility-scorecards-initiative/>.

support economic development and human well-being, with a focus on affordable and equitable access for all.

SUSTAINABLE DEVELOPMENT GOAL 11: Make Cities and Human Settlements Inclusive, Safe, Resilient and Sustainable



- Target 11.2: By 2030, provide access to safe, affordable, accessible and sustainable transport systems for all, improving road safety, notably by expanding public transport, with special attention to the needs of those in vulnerable situations, women, children, persons with disabilities and older persons.
- Target 11.3: By 2030, enhance inclusive and sustainable urbanization and capacity for participatory, integrated and sustainable human settlement planning and management in all countries.
- Target 11.8: Support positive economic, social and environmental links between urban, peri-urban and rural areas by strengthening national and regional development planning.

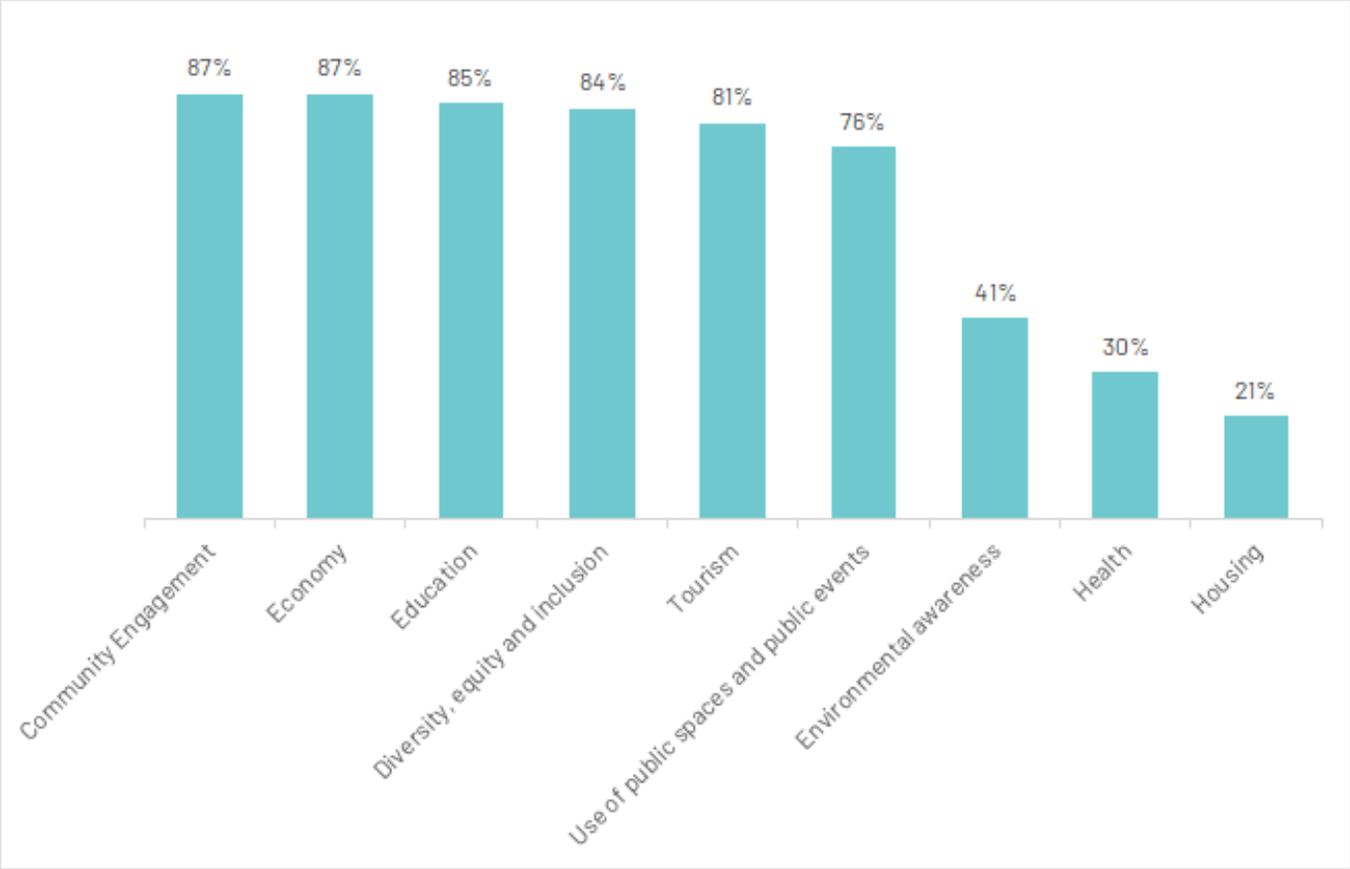
3.1.8. Marketing and Audience Development

Delaware is home to engaged audiences eager for new cultural experiences, but creatives have struggled to effectively market their work to attract the broadest possible audience. Sound Diplomacy’s survey analysis found that local audiences have a high interest in Delaware’s cultural activities, with 69% responding that they want to see more cultural events. A number of creative sectors ranked highly among audience respondents' preferences, including music (76%), theater, opera, dance, and circus (75%), cultural and natural heritage (64%), and visual arts (64%). The quality of bookstores, libraries, museums, and music venues in the state was also ranked highly by audience respondents.

Audience survey respondents also noted the positive impacts of the creative sector across various facets of community life, including community engagement (87%), the economy (87%), education (84%), and diversity, equity, and inclusion (84%), displaying a high regard for the creative economy and the value in its promotion and development to the larger social and economic life of Delaware as a community. The Arts & Economic Prosperity 6 report by Americans for the Arts shows that there is a strong engagement with the arts and culture

community in Delaware, as demonstrated through the fact that the research identified a large number of volunteers based in the state.¹²⁷

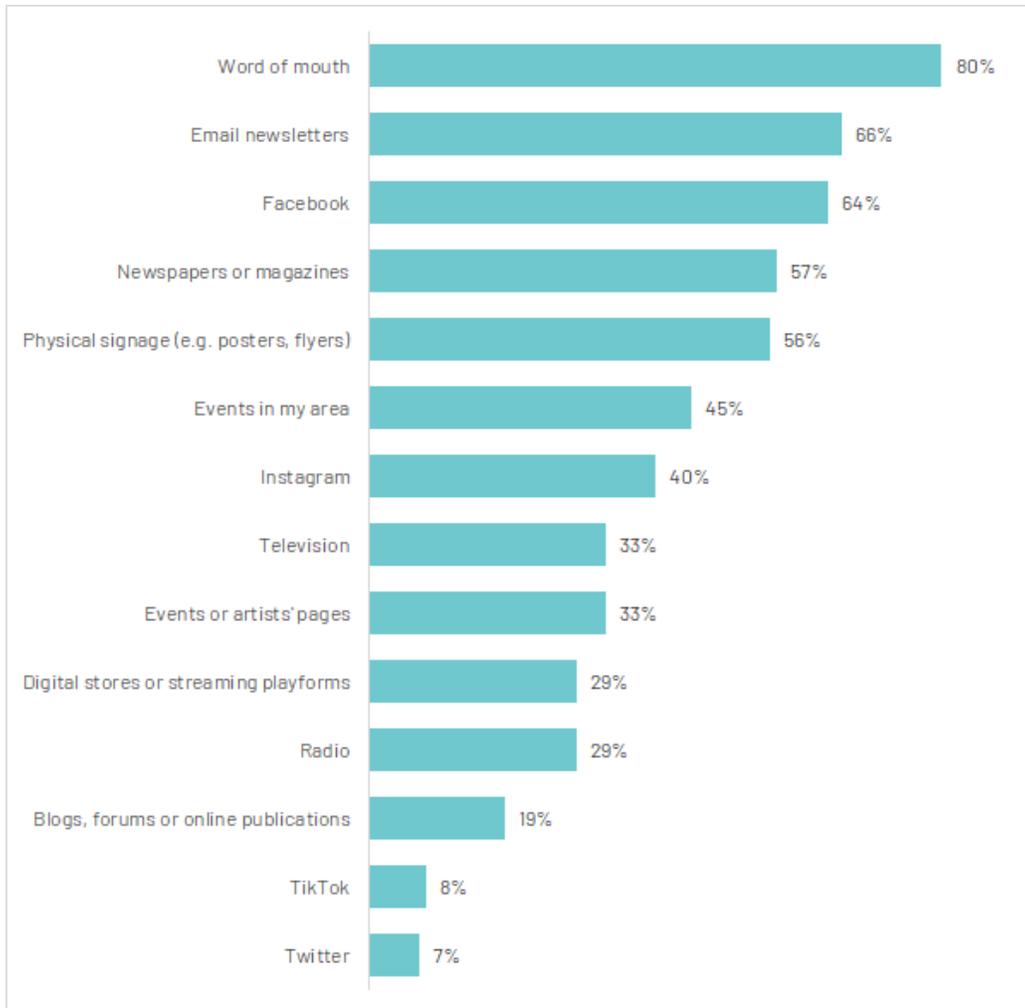
Figure 23. Cultural Local Audiences: Perceived positive impacts, Survey



¹²⁷ Americans for the Arts, “Arts & Economic Prosperity 6: The Economic & Social Impact Study of Nonprofit Arts & Culture Organizations & Their Audiences in Delaware.” (Washington, DC, 2023), 4.

However, overall audience interest in the creative economy is hampered by outdated marketing efforts. Sound Diplomacy's survey analysis found a diminished emphasis on social media/internet marketing in the state, indicating an overall lack of digital maturity.

Figure 24. Cultural Local Audiences: Preferred channels



As indicated by the above chart, audiences suggested a preference for traditional word of mouth marketing and promotion far and above digital platforms such as Facebook, Instagram, TikTok, and Twitter. Though word of mouth marketing have had noted local results, with innovative efforts having particular effect in rural areas, the lack of engagement with prominent digital platforms speaks to the greater issue of developing a larger audience base across localities in the state and further afield.

Professionalization, statewide marketing efforts, and lack of support

Research has revealed a lack of support for and knowledge of marketing cultural events and activities. As outlined in the above professional development section, survey respondents in the

creative industries noted that marketing, social media, and audience insights rank highly as skills they would like to develop.

In addition to professionalization, stakeholders suggested the lack of support is a pervasive perception shared by creatives in a variety of sectors across the creative ecosystem. Engagement found that potential audiences do not know where to go for information regarding activities, and that regionalisation means that people are split off from information regarding activities elsewhere. Added to this, stakeholders say that traditional media coverage is limited and advertising is often prohibitively expensive.

On the point of a perceived lack of support, stakeholders revealed that, while grants provided by the DDOA allow funds to be used for marketing creative projects, others do not. This limits the overall effectiveness of cultural events, products, and artworks produced with these funds.

Delaware does have a comprehensive platform for the promotion of cultural activities, DelawareScene, which covers the entire state and allows anyone to submit events and activities for inclusion. It is searchable using different filters and has been developed thanks to support from DDOA. The calendar aims to provide an overview of all cultural activities taking place in the state. It is also home to an artist roster, an arts jobs board, and an arts opportunities board (listing art competitions and open calls, etc.). A recent marketing campaign to promote DelawareScene on television, online, and outdoor billboards increased site visitorship by 88%.¹²⁸ In addition to DelawareScene, each regional tourism office has its own calendar of events, often populated by those uploaded to DelawareScene, as do individual county and city councils, although to various quality and upkeep. The DDOA also has its own Artist Index, which has the potential to cause confusion with the more expanded and engaging artist roster function on DelawareScene.¹²⁹ Finally, Southern Delaware Tourism has SouthDel Sidekick, an app that visitors can use to browse activities and events in the region. The state is clearly maturing when it comes to marketing its creative economy, although there is still quite some distance to go to promote arts and culture throughout the state and to visitors.

Conclusion

Delaware is home to diverse audiences keen to engage further with the state's creative economy. Marketing efforts to reach these audiences have fallen behind, however, and additional support, funding, and professionalization are needed to develop said audiences further.

¹²⁸ Kristin Pleasanton, email message to Sound Diplomacy, February 23, 2024.

¹²⁹ Delaware Division of the Arts, "Artist Index," accessed February 29, 2024, <https://delaware.gov/artistorster/artistByName.php>.

3.1.8.1. Recommendation 23: Offer Transit Shelter and Outdoor Advertising Space to Nonprofits

Policy

Supporting Stakeholders: Delaware Division of the Arts, Delaware Department of Transportation, DART First State, Downtown Development groups, Delaware Arts Alliance

Goals:

- Stimulate economic activity
- Raise awareness of the creative economy and share knowledge across creative sectors
- Create opportunities for a richer tourism offering

Timeframe: Short term (1-24 months)

Description: Offer nonprofit and cultural organizations free advertising opportunities in transit shelters, public buildings, and on street advertising implemented as part of downtown development plans.

Work with organizations that own advertising assets in downtown areas, transit shelters and billboards to allow cultural organizations to advertise upcoming exhibitions or events for free for two to four week periods. The cost of design, printing and delivery of the posters will be covered by the organizations. Private businesses that own advertising assets in public or semi-public areas can be required to run a percentage of free adverts by local groups as part of their contract for utilizing these spaces for for-profit activities at other times. Vancouver's Transit Shelter Advertising Program (see the benchmark case study provided below) provides an example of how this type of program can work in practice. The foyers of public buildings provide spaces to initiate advertising opportunities for local groups, as these are controlled by the State and could be made available to nonprofit groups. One period a year should be earmarked for promoting DelawareScene (see [Recommendation 25](#)).

Benchmark: Transit Shelter Advertising Program, Vancouver, CA

What Is It: The City of Vancouver offers free access to transit shelter advertising space for nonprofit arts and culture organizations through the Transit Shelter Advertising Program. The program provides free space on a basis determined by the City and

Outfront Media. Organizations are responsible for the costs associated with the design, production and delivery of the posters that will be advertised.¹³⁰

Who Is Responsible: The program is jointly managed by the City of Vancouver’s Cultural Services staff and Outfront Media, a private media company. Outfront Media provides the advertising space and schedules transit advertising campaigns as part of its contract with the City of Vancouver.¹³¹

What Has It Done: The program provides qualifying organizations with advertising space on transit shelters located within the City of Vancouver twice each calendar year. Subsequent applications will be considered only if space is available. The advertising spaces are not dedicated spaces, they are allocated throughout the City on a continually changing basis, which ensures that beneficiaries of the Transit Shelter Advertising Program are not limited to specific locations or neighborhoods.¹³²

Relevance for Delaware: Though the City of Vancouver has a more robust public transit system than Wilmington, transit shelters are no doubt prevalent throughout the state and this idea can be easily applied to other underutilized public spaces. The organization of this example as a public/private partnership has particular relevance to the contextual realities of Delaware, especially with renewed emphasis on such working relationships for the benefit of the creative economy.

SUSTAINABLE DEVELOPMENT GOAL 9: Build Resilient Infrastructure, Promote Inclusive and Sustainable Industrialization and Foster Innovation

- Target 9.8: Significantly increase access to information and communications technology and strive to provide universal and affordable access to the Internet in least developed countries by 2020.



¹³⁰ City of Vancouver, “Transit Shelter Advertising Program. City of Vancouver,” accessed January 26, 2024, <https://vancouver.ca/people-programs/transit-shelter-advertising-program.aspx>.

¹³¹ Ibid.

¹³² Ibid.

3.1.8.2. Recommendation 24: Improve the Maturity of Creative Industries-specific Marketing Practices and Knowledge with Work-Study Placements and Grants

Action

Supporting Stakeholders: Delaware Division of the Arts, Delaware Arts Alliance, Delaware State University, University of Delaware, Delaware Technical Community College, Local Marketing Agencies

Goals:

- Raise awareness of the creative economy and share knowledge across creative sectors
- Expand opportunities for professional development
- Stimulate economic activity
- Create opportunities for a richer tourism offering

Timeframe: Short Term (1-24 months)

Description: Supporting stakeholders should work to increase the professional pool of creative industry-minded marketing professionals and create more connections between specialists in this area with others in the creative economy. This can happen by establishing more synergy between those studying marketing and communications, those who are already working in this field, and other actors within the broader creative economy, such as artists, event producers, venues, etc. Specializations in marketing and PR for the creative industries should be introduced to existing marketing and communications majors at higher education institutions in the state. Furthermore, microgrants could also be introduced specifically designed to support arts professionals engaging Delaware-based specialists in marketing campaigns. Overall, this will be mutually-beneficial for young marketing professionals and creatives, as it provides the latter with local and professional experience and opportunities, and the former with expertise and assistance in an area by and large they are not trained in.

A two-pronged approach should include:

- Post-secondary marketing specializations: working with local universities and colleges, the DAA and DDOA should advocate for the creation of creative-industry minded specializations in marketing within established communications programs. Partnerships with prominent arts and creative industry organizations and businesses in the state should be forged to allow for work-study placements that are part of these specializations.

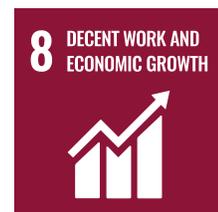
- These placements, supervised by course instructors and/or university mentors, will allow students to get real-world experience providing marketing expertise within the creative industry context while contributing to their portfolio and being the basis for coursework. Aspiring marketing professionals and organizations will be brought together, providing much needed marketing work and consultation at a discount, with the aim to grow the domestic engagement between these two sectors, and eventually slowing marketing brain drain in the state..
- In the medium to long term, the DDOA should introduce a micro-grant available to artists and arts organizations specifically for marketing and audience development purposes. Guidelines and goals for this micro-grant should be authored by the DDOA with input from the proposed working groups. Though the DDOA already includes a marketing budget as an allowable expense within their granting structures, these microgrants will allow for the additional promotion of ongoing creative projects that extend beyond the initial funding window. DDOA should ensure that such funds are distributed more or less equally between the three counties, and create a geographic distribution quota for this purpose. A % of these funds could be required to be spent only on independently owned, local media outlets.

Supporting the growth of creative-minded marketing expertise and artists' and arts organizations' marketing activities would benefit Delaware's creative ecosystem in various ways, including:

- Developing the pool of professional marketing firms in the state.
- Establishing a workforce development pipeline geared towards supporting the creative economy.
- Making arts and culture more closely tied to the "Delaware brand" through marketing, and increasing tourism in the long term.

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services.



3.1.8.3. Recommendation 25: Perform an Annual Marketing Campaign Promoting DelawareScene

Action

Supporting Stakeholders: Delaware Division of the Arts, Visit Delaware, Southern Delaware Tourism Office, Kent County Convention and Visitor Bureau, Greater Wilmington Convention and Visitors Bureau, DAA Project Lead, proposed Task Force and working groups, Delaware Arts Alliance's Communications Partner

Goals:

- Improve governance and strategic thinking
- Increase transparency and accountability
- Raise awareness of the creative economy and share knowledge across creative sectors
- Tackle issues related to geographic inequality
- Create opportunities for a richer tourism offering

Timeframe: Short term (1-24 months)

Description: All relevant stakeholders should collaborate annually to perform an audience awareness campaign related to DelawareScene similar to that conducted in 2023, especially ahead of busy summer seasons, to ensure that the platform is populated and visited by residents and visitors alike. Online advertising, social media and billboards will be especially effective for promoting DelawareScene. The platform will also be able to take advantage of any advertising opportunities made available to arts organizations in public and semi-public spaces (see [Recommendation 23](#)). The asset map can be used to identify areas suited for promotion because of a significant preponderance of tourism and creative economy assets, and facilitate measurement of the creative economy year on year. A PR and marketing specialist should be engaged to help strategize and perform any such campaign.

All creative economy stakeholders within the state should be reminded to populate DelawareScene with any events they are promoting. This can be done through repeated dispersal and its name should be mentioned at every opportunity to the broader public so that people remember it is a statewide resource they can refer to. Visit Delaware is already drawing on DelawareScene to populate its native calendar of events, and other government agencies and regional offices should be encouraged to either do the same or refer people to the DelawareScene website. DAA's Communications Partner should also embed DelawareScene into

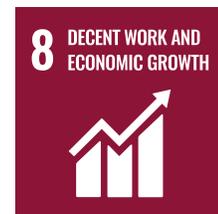
its marketing efforts in order to increase awareness of the platform. DelawareScene should also be linked to on the platforms and materials of statewide and regional tourism offices.

As well as being repeatedly promoted to audiences, the platform will also need to be kept up to date and populated with all relevant information regarding Delaware's creative economy. While it already boasts an events calendar, jobs board, an index of talent, and an index of grants opportunities, it could be further expanded by:

- Hosting resources directed towards artists and arts professionals written both by local organizations and ones that are freely available online. An index of materials regarding marketing and PR, including resources such as [Creative Capital's Social Media Guide](#), for example, would be useful.¹³³
- Guidelines describing best practices when it comes to applying for arts funding.
- Guidelines on regional and national economic development grants and tax rebates, how they relate to sectors in the creative economy, and best practices for applying.
- Add the ability for performance venues in the state to be listed on the platform. At present the types of venues listed on the search function are associated with artists.
- Being interlinked with the One-Stop Shop (see [Recommendation 4](#)).

SUSTAINABLE DEVELOPMENT GOAL 8: Promote Sustained, Inclusive and Sustainable Economic Growth, Full and Productive Employment and Decent Work for All

- Target 8.9: By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products.



3.2. Sector Snapshots

3.2.1. Audiovisual & Interactive Media

Audiovisual and Interactive Media contributes significantly as the primary driver of Delaware's creative economy, accounting for 32.6% of the state's total GVA where it is particularly robust in Dover, Middletown, and Wilmington. The sector comprises 11% of the state's total ecosystem

¹³³ Creative Capital, "Social Media Best Practices for Artists," March, 2023, <https://creative-capital.org/wp-content/uploads/2021/03/CC-Social-Media-Guide.pdf>.

assets, but possesses the highest direct output and employment generated. The sector's direct output of \$851.9 million accounts for 31% of the creative ecosystem's total, and employs 1,854 individuals (18% of direct employment in the ecosystem). Our economic research found that the AV sector has a high Location Quotient (LQ) of 1.81 but a low employment LQ of 0.54, signaling that the state has a higher number of businesses in this sector compared to the national average, but a lower number of employees per business, meaning that the businesses tend to be relatively small. The footprint of the sector, coupled with its small business size, indicate that the sector is in a period of growth and would benefit from additional funding to become more resilient and sustain said growth.

Regulation & Funding

For such a significant sector that has majorly transformed the creative economy in other states (such as Georgia and New Jersey), the regulatory standard practices and taxation in Delaware's film and television industry are lacking. The sector lacks industry standard permit practices, tax incentives, workforce development, and DE&I standards. While some stakeholders argued that this lack of policy results in a certain amount of freedom uncommon to well-developed film production hubs, Delaware's audiovisual sector needs a clear regulatory environment and licensing structures in order to grow to its full potential.

House Bill 465, the Delaware Entertainment Job Act, devised in 2021/22, was designed to "encourage jobs creation, artistic endeavors and investment in the film, television, esports, and video game industry in the State of Delaware, and the attendant benefits for the economy and job growth" with a proposed 30% production tax credit.¹³⁴ The bill failed to pass. Unlike the above-mentioned jurisdictions, Delaware does not presently have a comprehensive index or map of resources or important information for those working in film to utilize. Each of these issues speaks to an overall outdated view of the audiovisual sector in the state outlined by stakeholders. This is confirmed by an emphasis on traditional "motion picture" production when the sector includes major contributions from the related fields of advertising, radio, television, and digital media production and broadcasting.

Funding has been made available by the State to the Delaware Motion Picture and Television Development Commission, a public body, but stakeholders noted that the commission's activities are uncertain and that there is a lack of oversight concerning how funding has been allocated and spent by the Commission. There is therefore a need, as stakeholders have argued, for a fully operational film commission in the state that can foster local productions and attract larger

¹³⁴ Delaware General Assembly, "House Bill 465," accessed January 12, 2024, <https://legis.delaware.gov/BillDetail/119633>.

runaway projects. There is some additional confusion between the role of the Commission (a public body) and Film Delaware, a private enterprise.

Diversity, Equity, and Inclusion in Audiovisual and Interactive Media

Stakeholders noted that the AV industry in Delaware has been less than inclusive, with existing grants going to well-established individuals and entities, over new and diverse media makers. Many such media makers described having to go out of state to Philadelphia or elsewhere to find community, audience, and support for their projects. Delaware benefits, however, from a number of organizations specifically committed to improving equity within the AV industry whilst shoring up the sector. Reel Families for Change (RFC), for example, is “dedicated to generating meaningful and effective solutions for working families in the American screen industries,” and they strive to spotlight “those who have been traditionally underserved, overlooked, and silenced in the entertainment industry.”¹³⁵ Given RFC’s significant work in the sector to date, they should be prioritized as an essential partner in modernizing Delaware’s film and media policies.

3.2.2. Performance and Celebration

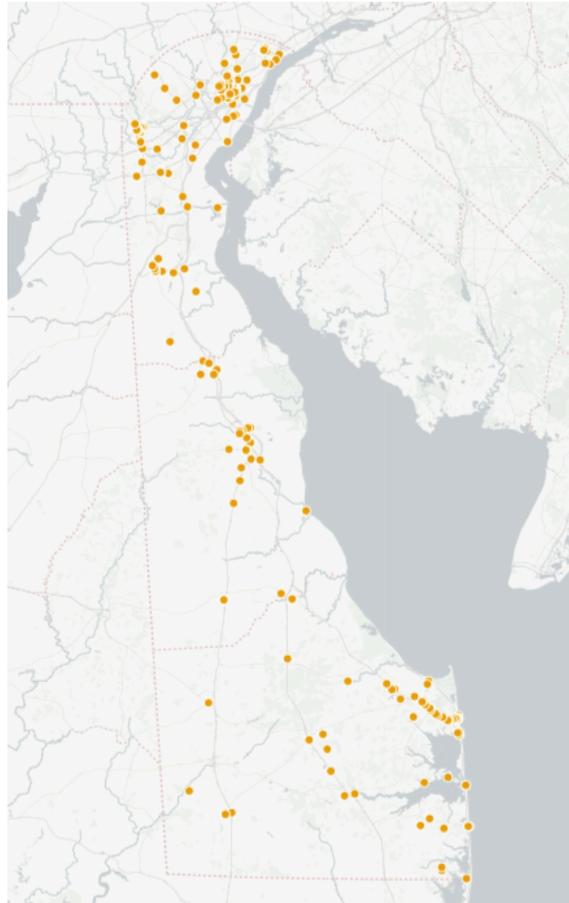
The performance & celebration sector, which includes live music, theater, dance, circus, and more, accounts for 8% of the total assets in Delaware’s creative economy. Performance & celebration employs 433 individuals, has an output of \$27.1 million dollars and a gross value added of \$16 million dollars. New Castle County boasts a particular strength in this sector, and it is in the top 5 most concentrated sectors in Sussex County as well. As noted in the Tourism section, there is a geospatial coordination of performance & celebration and tourism assets in Sussex County, suggesting the potential for increased synergies between these two sectors towards more robust cultural tourism.

While music, performance and celebration has a smaller number of total assets than other sectors (8%), the sector is still fundamentally important to Delaware’s creative economy as the most popular forms amongst the audiences surveyed in Sound Diplomacy’s analysis, where they noted a 76% interest in music, followed by a 75% interest in theater, opera, dance, and circus. This importance is not reflected in average incomes for the sector, as performing arts exhibited lower than average annual incomes (\$36,335) than the rest of the creative economy. This is a particular issue in these sectors, as our survey analysis found that a higher than average percentage of creatives (64%) in the performance field derive their income from their craft, but are struggling to meet basic financial needs. Performing arts organizations nonetheless exist in the state, and

¹³⁵ Reel Families For Change, “Homepage,” reelfamilies.org, accessed January 12, 2024, <https://reelfamilies.org/>.

these lower than average numbers likely speak to issues related to limited funding and infrastructure.

Figure 25. Regional Distribution of Assets in the Performance & Celebration Sector, Mapping



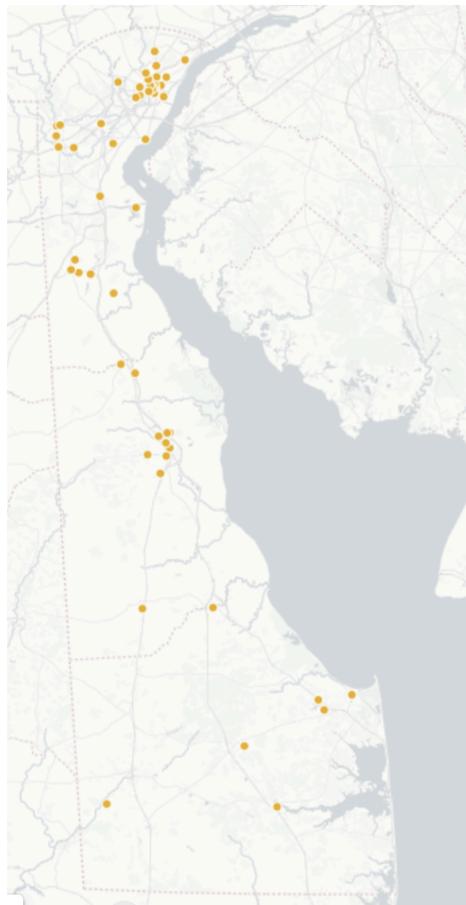
Sound Diplomacy’s mapping showed that there are regional inequalities when it comes to accessing performances, with the majority of performance venue infrastructure centered around Wilmington and the north of the state, with a few assets in this category clustered around Dover and the Rehoboth Beach area (see Figure 25). These inequities need to be addressed, given the overall popularity and importance of these sectors to the wider creative economy of Delaware.

Copyright registration is of particular importance to this sector and, while an average of 35% of respondents protect their work through the United States Copyright Office, there remains an issue with not fully understanding the value of copyright registration, or how to do it.

Lack of Spaces and Professional Opportunities

Of central importance to the performance sector is the lack of sufficient infrastructure, as the state is lacking in rehearsal or workshop space. The lack of rehearsal space, particularly for musicians, was confirmed by our mapping (see Figure 26), and what little there is is clustered in the north of the state with very little in the south. As outlined in the Professional Development section above, there is a dearth of well-trained intermediaries in the performance sector, and local creatives would like to develop their own marketing expertise.

Figure 26. Regional Distribution of Assets in Other Support Subsector of the Performance & Celebration Sector, Mapping



This overall lack of space is matched by some of the difficulties facing festivals in the region. While the Ladybug music festival continues to be a prominent and popular event, it has been

hampered by the outmoded regulatory environment described in the Creative Economy Development section above, and the noted Firefly Festival's future in Delaware is uncertain.

Stakeholders in the performance sector described a tight-knit and mutually cooperative community of performers, who are nonetheless held back by a lack of funding and infrastructure in the ecosystem. Additionally, many of the challenges described in this report, including an unclear and outmoded regulatory environment in the state and a lack of comprehensive marketing tools, can make performance activities difficult to sustain.

3.2.3. Music Recording & Publishing

As a sector, music recording & publishing has less prevalence in the state than any other sector, representing 1% of total state assets. Relatedly, music recording & publishing has a below-average concentration of businesses (0.91) and employment (0.46) in Delaware, with even less concentration for performing arts in terms of establishments (0.39) and employment (0.33). All told, Sound Diplomacy's economic impact analysis found that the sector employs some 50 people. Despite its relatively small size, the economic impact assessment shows that music recording & publishing contributes nearly the same GVA to Delaware's economy (1.1%) as the performing arts do (1.2) and \$18 million dollars in output. These results indicate a sector with a strong entrepreneurial spirit that is nonetheless underdeveloped with low professionalization and technical development.

Figure 27. Regional Distribution of Assets in the Music Recording & Publishing Sector



Copyright registration is of particular importance to this sector and, while an average of 35% of respondents protect their work through the United States Copyright Office, there remains an issue with not fully understanding the value of copyright registration, nor the proper professionalization to adequately address the issue.

Sound Diplomacy's desk research and literature review found a few active initiatives in this sector. The Delaware Symphony Orchestra players are members of the American Federation of Musicians (AFM) Local 21, and recently approved a three-year collective bargaining agreement that will be in effect until August 2025. Musicians in Delaware belong to the Philadelphia Chapter of the Recording Academy, which also includes the rest of Pennsylvania and South New Jersey. Delaware is also home to a state chapter of the National Independent Venue Association (NIVA). The Recording Conservatory, a decentralized school for audio engineering, music and video production and business, partners with studios in Wilmington to provide classes in music production, and has a map showing the location of their partners in the city. A site called Industry

Hackerz lists 10 recording studios that are based in Delaware, although this is a very informal list and not systematized.

Our regulatory assessment ranked each category (financial support & incentives; licensing & regulations; guilds, unions, and conferences; map of resources) as underdeveloped as we were unable to find evidence of any applicable regulations.

Stakeholder engagement identified a significant degree of untapped potential talent in this sector across the state. There are some networking opportunities in the sector, with the “Homey Awards” a noted local response to the Grammys. Unfortunately, there are not many organizations that emphasize professionalization in this field, with professionals seeking training and opportunities for growth out-of-state in Philadelphia or further afield. Stakeholders did note a strong spirit of collaboration amongst music professionals in the state, indicating an ecosystem poised to seize the benefits of an overall elevated creative economy in the state.

A majority of the recommendations are transversal, and should work to boost this sector. The following recommendations are particularly relevant to music recording & publishing: [2](#), [6](#), [18](#), and [19](#).

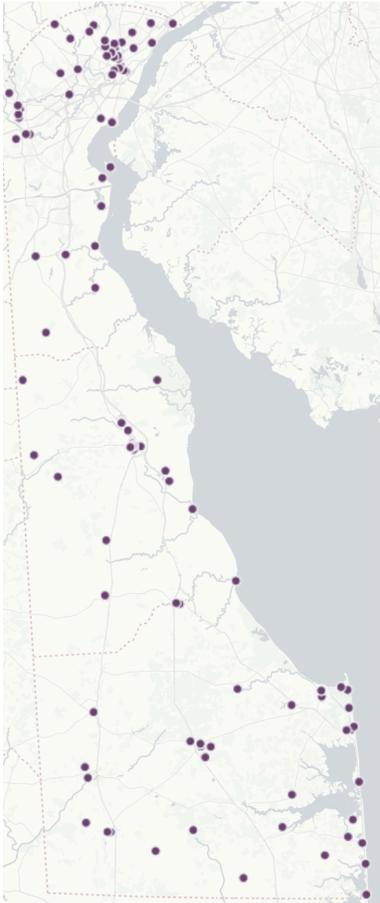
3.2.4. Cultural & Natural Heritage

Delaware is well developed in terms of Cultural and Natural Heritage with a wealth of historical sites and parks and long standing networks and institutions. Our survey analysis shows that audiences have high opinions of museums and cultural landscapes (rating 3.7/5 each). The sector, which includes museums, heritage sites, zoos, botanical gardens, and more, accounts for 5% of the total cultural assets in Delaware. As outlined in the above tourism section, there is a geospatial correlation between cultural & natural heritage and tourism assets in Sussex County, suggesting the potential for increased synergies between these two sectors towards more robust cultural tourism. The sector has a relatively low location quotient for establishments (0.84), but a relatively high location quotient for employment (2.81), which suggests a smaller number of larger institutions in the state that employ many people.

Sound Diplomacy’s desk research and literature review found a number of active initiatives and sectoral support organizations within the sector, including a Historic Preservation Tax Credit Program, the Delaware Historical Society, and the Delaware Division of Historical and Cultural Affairs, which boasts an education curator working to develop heritage pedagogy for K-12 students in the state. Additionally, there is an upcoming museums study that will explore the economics of the historical organizations that exist in the state.

Our regulatory assessment rated financial support & incentives; licensing & regulations; and guilds, unions & conferences in the sector as mature. There is room for growth in developing a comprehensive mapping tool for all assets in the sector.

Figure 28. Regional Distribution of Assets in the Cultural & Natural Heritage Sector



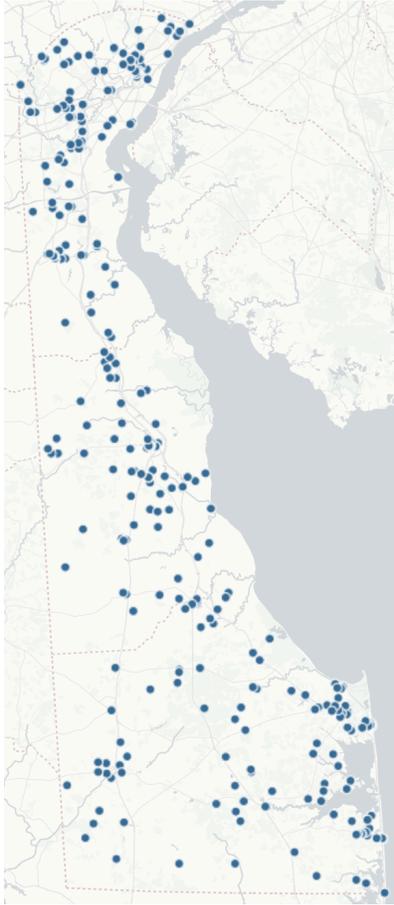
The largest concern related to the cultural & natural heritage, and reflected in Sound Diplomacy’s stakeholder engagement, is that the sector is largely siloed from the rest of the creative economy with very few established opportunities to collaborate with other sectors. With well-developed and robust institutional support structures and internal organization, the sector has much to teach the rest of the creative economy, and opportunities for increased collaboration with sectors such as performance & celebration, visual arts & crafts, and design & creative services would be to the benefit of the wider cultural ecosystem in the state.

A majority of the recommendations are transversal, and should work to boost this sector. The following recommendations are particularly relevant to cultural & natural heritage: [1](#), [2](#), [9](#), [12](#), [15](#), [17](#), and [22](#).

3.2.5. Visual Arts and Crafts

Visual arts and crafts accounts for 15% of the total cultural assets in Delaware, with visual arts creation representing the highest present sub sector in the state at 13%. Photographers, who are included in this sector, have a particularly robust presence. Audiences queried in our survey analysis expressed a strong interest in exploring the visual arts and crafts with 64%, exceeded only by music and theater. The sector exhibits a slightly below-average concentration in Delaware, indicating a moderate presence of businesses (0.83) and employment (0.57). This scenario might reflect a landscape with a mix of smaller art studios, galleries, and craft workshops. To strengthen this sector, targeted initiatives encouraging collaboration between artists, galleries, and local communities could foster a supportive ecosystem. Additionally, promoting art-related events and educational programs might enhance awareness and engagement, potentially leading to the growth and diversification of the visual arts & crafts industry in Delaware. 70% of creatives from this sector derive their income from sources related to their creative work. This sector has the benefit of being locally focused in a number of areas, with the survey analysis showing that a higher than average percentage of creatives in this sector rely upon clients (55%) and suppliers (69%) from within the state.

Figure 29. Regional Distribution of Assets in the Visual Arts and Crafts Sector



Sound Diplomacy’s desk research and literature review found a number of active initiatives and sectoral support organizations within the sector. This includes the Delaware Art Museum, which provides support to the local arts scene through an arts & wellness program, professional development courses, and professional services; the DDOA recognizes artists for their outstanding quality of work and provides funding through the Delaware Individual Artist Fellowship. Meanwhile, the Delaware State Employee Art Exhibition presents an opportunity for public employees to present their creative works and compete for cash prizes.

Our regulatory assessment rated financial support and incentives in the sector as having room for growth. While the DDOA provides a number of artist grants, these are reserved for nonprofit and non-commercial artistic endeavors which cuts off potential funding for for-profit businesses in this sector. The assessment rated guilds, unions, and conferences and map of resources both as underdeveloped, as neither appear to presently exist for the sector.

Stakeholder engagement focused on this sector yielded a particularly robust session. Participants revealed issues with an exclusionary atmosphere within the sector, with governing boards and funding opportunities going to predictable applicants within the sector whilst underrepresented voices struggle to find the support they need. This challenge is matched by a generational gap within the audience for this sector, who may not be sufficiently open to innovation. Nonetheless, the session revealed a critically engaged and proactive sector ready to seize opportunities, even while dealing with a need for increased communication and networking.

A majority of the recommendations are transversal, and should work to boost this sector. The following recommendations are particularly relevant to visual arts & crafts: [1](#), [2](#), [5](#), [6](#), [13](#), [14](#), [15](#) and [18](#).

3.2.6. Books & Press

The books & press sector, which includes newspapers, publishers, libraries, and more, accounts for 8% of the total assets in Delaware's creative economy. The sector employs some 1,355 individuals (the third largest employer in the creative economy) and is the second largest industry in terms of output (\$485.8 million; 21% of total creative economy) but with a slightly-below average concentration. Nonetheless, the sector is significant in terms of gross value added to the creative economy, ranking second only to the audiovisual sector (32.6%) at 21.1%. The sector appears to have a dominant concentration in Georgetown. Surveyed local audiences were particularly positive concerning the quality and availability of bookstores and libraries in the state. These high ratings may explain why the same audiences are not showing high interest in increased offerings from this sector. While Delaware's libraries account for many of these figures, there are also numerous small and independent publishers in the state as well as printers.

Sound Diplomacy's desk research and literature review found a number of positive initiatives and activities in this sector. There are ongoing efforts to revive local journalism, such as The Local Journalism Initiative, which provides an internship program and has founded the Delaware Journalism Collaborative. The state has dual Poets Laureate: Nnamdi O. Chukwuocha and Albert Mills, and the Delaware Division of the Arts hosts an annual Writers' Retreat. Despite these points, the sector is disconnected from others in the creative economy and the need for a local journalism initiative points to a nationwide crisis in the field.

Figure 30. Regional Distribution of Assets in the Books & Press Sector, Mapping



Our regulatory assessment found financial support & incentives and a map of resources to be underdeveloped in this sector, as there is an overall lack of both. There is room for growth in industry conferences, as certain book festivals have recently ceased operations. Delaware is home to a preponderance of libraries, many of which host arts & culture programming. The Delaware Division of Libraries (DDOL) is in the process of renovating and revitalizing the state's libraries, and has already renovated many in the state. In 2022, the DDOA and DDOL launched a creative aging program which has been well-received based on its frequent mention during stakeholder engagement. Delaware finds itself in a position to improve its literacy rates, as it sits roughly in the middle of per state rates nationwide at 79.7%.¹³⁶ Both Delaware libraries and Literacy Delaware are making a positive influence with literacy programs for children and adults, and there is a political effort being put into supporting a statewide literacy program, and integrating literacy into various disciplines within schools.

¹³⁶ Wise Voter, "Literacy Rates by State," wisevoter.com, accessed January 26, 2024, <https://wisevoter.com/state-rankings/literacy-rate-by-state/>

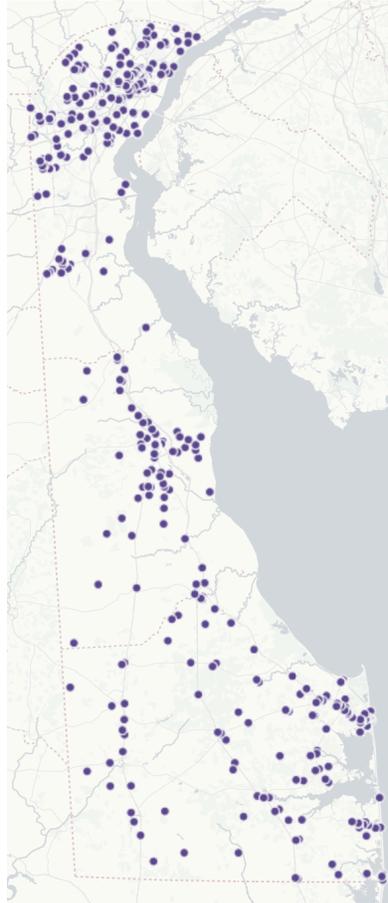
Though the stakeholder engagement process did not include a specific session for this sector, libraries were represented with particular positivity. Stakeholders identified the Wilmington Library as a noted hub of resources and cultural activities, and more than a few stakeholders noted that libraries fill a much needed gap in cultural education in the state. This is reflected by a governmental emphasis on the importance of libraries to the socio-cultural well being of Delaware. Stakeholders did note some issues with the local press as it pertains to arts and culture, suggesting that what local journalism does exist does not prioritize cultural activities in the state.

A majority of the recommendations are transversal, and should work to boost this sector. The following recommendations are particularly relevant to books & press: [1](#), [5](#), [6](#), [12](#), [16](#) and [18](#).

3.2.7. Design & Creative Services

The design & creative services sector, which includes graphic, interior, and industrial design, and more, has the highest concentration of assets across Delaware's creative economy (20% of total assets). The majority of these assets are located in and around Wilmington and Dover. The sector boasts the highest average income across the creative economy at \$93,177. This is matched by the sector representing the third largest in the state in terms of output (\$209.7 million, 9% of total creative economy output). The sector employs some 1,244 individuals and has a moderate presence in the state's economy. This likely suggests that the industry is mostly populated by small design firms and freelancers.

Figure 31. Regional Distribution of Assets in the Design & Creative Services Sector



The preponderance of smaller businesses may explain why design & creative services are lacking representation within the broader creative economy and not typically included in the programs and events hosted by various arts organizations. Our desk research and literature review identified very little data pertaining specifically to this industry, which confirms its underrepresentation within institutions concerned with supporting the creative economy in Delaware.

Our regulatory assessment rated each of financial support & incentives; licensing and regulations; guilds, unions, and conferences in the industry as underdeveloped, as Sound Diplomacy was unable to find any specific information regarding these topics related to design & creative services.

Participants from this sector in our stakeholder engagement sessions underscored a reality of inefficient and insufficient financial and infrastructural support in the state that is exacerbated by poor representation and a lack of equity across the board. Participants in this sector stressed the

obvious disparities between Wilmington and Philadelphia’s creative ecosystems noting that, while many design creatives join the “brain drain” to the latter city, that its creative community could serve as a model for further development in Delaware.

A majority of the recommendations are transversal, and should work to boost this sector. The following recommendations are particularly relevant to design & creative services: [1](#), [9](#), [16](#), [17](#), [18](#), and [25](#).

3.3. Implementation Timeline

Table 11. Implementation Timeline

RECOMMENDATIONS			
Creative Economy Development			
	Short term (1-24 months)	Medium term (24-48 months)	Long term (48+ months)
1: Establish a Creative Economy Task Force That Continues To Build Cross-Sectoral Collaboration and Engage Stakeholders			
2: Establish Creative Hubs in Each County			
3: Update Special Event and Performance-Related Permits and Licenses at the State, County, and City Level			
4: Develop a Statewide Digital “One-Stop Shop” for Permits and Licenses			
Industry Support			
5: Include the Creative Economy in Statewide Business and Economic Development Communications and Programs			
6: Create a Full-time Government Position to Represent the Interests of the Creative Economy’s Self-Employed and Small Businesses			

7: Create Fair Pay Guidelines for Artists, Creatives and Professionals in the Creative Industries			
8: Modernize Delaware's Film & Media-production Industry			
Tourism			
9: Develop a Statewide Cultural Economy Brand to Benefit Tourism, Economic Development, Export, and Audience Development			
10: Increase Cultural Tourism Offerings			
11: Emphasize Arts & Culture in Delaware's Tourism Communications			
Funding			
12: Identify Additional Revenue Streams to Support Delaware's Creative Economy			
13: Expand Equitable Arts Funding			
Education			
14: Secure Arts Funding for Every Student in Public Education			
15: Make Arts Education Mandatory in Secondary Education			
16: Improve Career Development Opportunities for Secondary Education Students			
17: Advocate for More Pathway Courses and Associate Degrees Related to the Creative Economy			
Professional Development			
18: Host Professional Development Workshops and Lectures			
19: Improve Professionalization Related to Copyright and IP with the Support of Legal Professionals			

20: Formalize Creative Economy Internships			
Infrastructure Development			
21: Identify and Promote Spaces for the Creative Economy			
22: Support Access to Increased Public Transportation in Delaware			
Marketing and Audience Development			
23: Offer Transit Shelter and Outdoor Advertising Space to Nonprofits			
24: Improve the Maturity of Creative Industries-specific Marketing Practices and Knowledge with Work-study Placements and Grants			
25: Perform an Annual Marketing Campaign Promoting DelawareScene			

4. 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 and 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 inequities exist within the creative economy; and legislative framework is 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.

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.

With more strategic focus, utilizing the existing and strong talent that already exists within Delaware, the state and its various agencies can position itself as a national leader when it comes to statewide creative economy development. This report provides the Delaware Arts Alliance and other key stakeholders with the data to demonstrate the value of the creative economy, and to advocate for and focus strategic planning to facilitate improvements and growth across all its sectors and throughout the state.

5. Detailed Methodology

5.1 Regulatory Assessment and Comparative Analysis

Coordinating with our partners in Delaware, Sound Diplomacy conducted thorough research into the regulations, laws and programs that are related to the creative ecosystem and cultural tourism. Sound Diplomacy has largely prioritized those regulations and programs which directly relate to our scope of work. When possible and necessary, in instances where there is less maturity in regards to a particular sector or topic, regulations and programs with only indirect or associative relationships have also been noted. The regulations have been broken down into:

1. **Cross-sector Regulations**

These are topics which are transversal to all creative sectors in nature and are also typically organized at the state level.

2. **Sector-specific Regulations**

These are topics which pertain specifically to the seven sectors we are studying, and which are typically organized at the state level.

3. **Regionally Managed Regulations**

Based on our conversations with Delawarean stakeholders, we have identified the topics which are typically managed at a regional and municipal level smaller than the state level.

The analysis of the regulations, laws and programs involves each topic being assigned one of the following three qualitative indicators:

- Underdeveloped: Nonexistent or no longer active.
- Room for growth: In place but outdated, limited, and/or producing uncertain results.

- Mature: Resembles a benchmark for this topic.

A brief explanation to justify these categorizations is also included. The “Miscellaneous” rows are not analyzed due to the fact that they do not contain standard elements. Where appropriate, benchmarks have been provided.

Benchmarks have been selected to represent a “best case” example of an activity related to this topic. They are not necessarily fully applicable to Delaware’s situation or context, but can instead be used as starting points for thinking about improvements or necessary programs for topics which are deemed underdeveloped or have room for growth. Case studies chosen due to their relevance to Delaware’s unique situation will be discussed at a later stage of this research.

Throughout the Regulatory Assessment financial support and grants related to the different sectors are noted. For the sake of ease, the most relevant grants are listed in full at the end of this section.

5.1.2 Literature Review

The Literature Review contains summaries and assessments of key strategic documents relevant to the scope of this research. It is divided between statewide and regional, and features literature that was supplied or recommended by the Delaware Arts Alliance and other key stakeholders. Where possible, it focuses on recent strategies related to the creative ecosystem & economy and/or cultural tourism. Where this is not possible, literature that is related and relevant to the scope of research has been reviewed.

5.2 Asset Mapping

5.2.1 Asset Definitions

Below is the classification of the **Artistic creation & performance** sector assets (see Table 12).

Table 12. Classification of Artistic Creation & Performance Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
Cultural & natural heritage	Restorers of works of art and museum collection objects	Independent (e.g. freelance) individuals that perform in artistic productions, in creating artistic and cultural works or productions, or in

		providing technical expertise necessary for these productions, such as art restorers.
Music creation	Musicians, artists and composers	Independent musicians, artists or composers.
	Bands, orchestras & choirs	Professional and community bands and orchestras, professional and community choirs and singing groups, including church choirs.
Performing arts creation	Independent performers (actors, dancers, and script writers)	Independent performers such as actors and dancers, and script writers.
	Independent performers (magicians, acrobats)	Independent performers such as magicians and acrobats.
	Performing arts companies (theatre, dance)	Includes companies, groups, or theaters primarily engaged in producing all types of live theatrical (e.g., ballet, contemporary dance, folk dance) presentations. The companies or groups may or may not operate their own theater or another facility for staging their shows.
Visual arts creation	Visual artists	Independent (e.g. freelance) individuals primarily engaged in performing in artistic productions, in creating artistic and cultural works or productions, or in providing technical expertise necessary for these productions, such as painters or sculptors.
Books & press creation	Books, newspapers & periodical writers	Independent (e.g. freelance) individuals primarily engaged in performing in artistic productions, in creating artistic and cultural works or productions, or in providing technical expertise necessary for these productions, such as journalists and book writers.
Film & video creation	Independent film & video creatives (movie directors)	Independent creatives such as movie directors.
Radio & TV creation	Independent radio & TV creatives (TV directors, radio DJs)	Independent creatives such as TV directors, radio DJs.

Below is the classification of the **Audiovisual & interactive media** sector assets (see Table 13).

Table 13. Classification of Audiovisual & Interactive Media Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
Film & video production and post-production	Film & video production companies	Establishments that produce, or produce and distribute motion pictures, videos, television programs, or television commercials.
	Film & video postproduction companies	Establishments that provide specialized motion picture or video postproduction services, such as editing, film/tape transfers, subtitling, credits, closed captioning, and animation and special effects.
	Other motion picture and video services organizations	Establishments that provide motion picture and video services such as film processing laboratories, film restoration, motion picture booking agencies, film preservation services, etc.
Film & video distribution	Film & video distribution companies	Establishments that acquire distribution rights and distribute film and video productions to motion picture theaters, television networks and stations, and exhibitors.
	Movie rental stores	Establishments that rent prerecorded video tapes and discs for home electronic equipment.
Film & video exhibition	Movie theatres	Establishments that operate motion picture theaters (except drive-ins) and/or exhibit motion pictures or videos at film festivals, and so forth.
	Drive-in movie theaters	Establishments that operate drive-in motion picture theaters.
Film & video production supplies	Motion picture film manufacturing organizations	Establishments engaged in manufacturing sensitized film, paper, toners and photographic chemicals amongst others.

Film additional support	Motion picture booking agencies & film restoration providers	Individual film companies ranging from film booking agencies, film restoration services, and film libraries.
Radio broadcasting	Radio networks	Public, community and commercial music radio networks.
	Radio stations	Public, community and commercial music radio stations.
Audiovisual production and broadcasting	Television broadcasting networks	An organization that distributes television program content (images together with sound), transmitting programs to the public.
	Cable television networks	Establishments engaged in operating studios and facilities for the broadcasting of programs on a subscription/fee basis.
Audiovisual reproduction	Mass reproducers of cassette tapes and prerecorded audio	Establishments that mass reproduce computer software or other prerecorded audio and video material on magnetic or optical media, like DVDs, tapes, or cartridges. It includes establishments that mass reproduce game CDs.
Audiovisual production supplies	Television transmitting antennas manufacturers	Establishments that manufacture television broadcast, wireless communications equipment, audio and video equipment, audiotapes, and cameras and television retailers.
	Home theater audio and video equipment manufacturers	Establishments that manufacture television broadcast, wireless communications equipment, audio and video equipment, audiotapes, and cameras and television retailers.
	Audiotape manufacturers	Establishments that manufacture television broadcast, wireless communications equipment, audio and video equipment, audiotapes, and cameras and television retailers.
	Cameras, and television merchant wholesalers	Establishments that manufacture television broadcast, wireless communications equipment, audio and video equipment, audiotapes, and cameras and television retailers.

	News reporters, picture gatherers and distributors	Establishments that supply information, such as news reports, articles, pictures, and features, to the news media.
Digital design, programming and publishing	Games and computer software publishers	Establishments that work on the activities necessary to produce and distribute computer software.
	Software programmers	Person (or organization) that writes, modifies, tests, and supports software in order to fit customers' requirements.
	Computer software consultants	Person (or organization) that plans and designs computer systems to integrate with hardware, software, and communication technologies.
Digital hosting and broadcasting	Web hosting, video and audio streaming organizations	Establishments that provide the infrastructure for hosting or the services for data processing.
	Internet broadcasting organizations	Establishments engaged in operating studios and facilities for internet broadcasting.

Below is the classification of the **Books & press** sector assets (see Table 14).

Table 14. Classification of Books & Press Related Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
Books & press publishing	Books publishers	Establishments that carry out design, editing, and marketing activities necessary for producing and distributing books. These establishments may publish books in print, electronic, or audio form.
	Newspapers publishers	Establishments that produce and distribute newspapers, including gathering news; writing news columns, feature stories, and editorials; and selling and preparing advertisements.

	Periodic publishers	Establishments known either as magazine publishers or periodical publishers. These establishments carry out the operations necessary for producing and distributing magazines and other periodicals, such as gathering, writing, and editing articles, and selling and preparing advertisements.
	Directory and mailing list publishers	Establishments that publish directories, mailing lists, and collections or compilations of fact.
	Greeting card publishers	Establishments primarily engaged in publishing greeting cards.
	Other publishers	Establishments that publish works in print or electronic form, such as calendars, catalogs, yearbooks, or posters.
	Books & press printing establishments	Establishments that print on apparel, paper and other materials.
	Libraries & archives	Establishments that provide library or archive services. They are engaged in maintaining collections of documents (e.g., books, journals, newspapers, and music) and facilitating the use of such documents (recorded information regardless of its physical form and characteristics) as required to meet the informational, research, educational, or recreational needs of their user.

Below is the classification of the **Cultural & natural heritage** sector assets (see Table 15).

Table 15. Classification of Cultural & Natural Heritage Related Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
Cultural & natural heritage	Museums	Establishments that preserve and exhibit objects of historical, cultural, and/or educational value.

	Zoos & botanical gardens	Establishments that preserve and exhibit live plant and animal life displays.
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Below is the classification of the **Cultural Education** sector assets (see Table 16).

Table 16. Classification of Cultural Education Related Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
Cultural education	Organizations that provide traineeship programs in the cultural & creative field	Traineeships programs in the Cultural & Creative field.
	Conservatories/ universities with cultural & creative programs or business programs for the cultural & creative industries	Conservatories/ Universities with Cultural & Creative Programs or Business Programs for the Cultural & Creative industries.
	Public and private schools with cultural & creative programs	Public and private schools with cultural & creative programs.
	Private instructors	People who operate independently of an organization, often offering cultural and creative-related skills tutoring services from their own studios or from home.

Below is the classification of the **Design & creative services** sector assets (see Table 17).

Table 17. Classification of Design & Creative Services Related Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
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Specialized design creation	Interior designers	Establishments that plan, design, and administer projects in interior spaces to meet the physical and aesthetic needs of people using them, taking into consideration building codes, health and safety regulations, traffic patterns and floor planning, mechanical and electrical needs, and interior fittings and furniture.
	Industrial design companies	Establishments that create and develop designs and specifications that optimize the use, value, and appearance of their products.
	Graphic designers	Establishments that plan, design, and manage the production of visual communication in order to convey specific messages or concepts, clarify complex information, or project visual identities.
	Costume, fashion and jewelry design companies	Establishments that provide professional design services such as costume design, jewelry design, fashion design, textile design, etc.
Architectural creation	Architect organizations	Establishments that plan and design residential, institutional, leisure, commercial, and industrial buildings and structures by applying knowledge of design, construction procedures, zoning regulations, building codes, and building materials.
Architectural creation	Landscape architect organizations	Establishments that plan and design the development of land areas for projects, such as parks and other recreational areas; airports; highways; hospitals; schools; land subdivisions; and commercial, industrial, and residential areas, by applying knowledge of land characteristics, location of buildings and structures, use of land areas, and design of landscape projects.
Advertising	Advertising agencies	Establishments that create advertising campaigns and place such advertising in periodicals, newspapers, radio, and television, or other media.

Below is the classification of the **Music recording & publishing** sector assets (see Table 18).

Table 18. Classification of Music Recording & Publishing Related Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
Recording & publishing	Music publishers	Person (or organization) responsible for licensing and administering the composition copyrights of songwriters.
	Recording studios & rehearsal rooms	Registered, music and audio studios offering music recording, mastering and rehearsal services.
	Record labels	Music labels with physical presence.
	Pre-recording producers & distributors	Establishments that provide sound recording services (except record production, distribution, music publishing, and sound recording in a studio), like produce and distribute pre-recorded music programs or radio shows.

Below is the classification of the **Performing arts: live music, theater, dance, circus** sector assets (see Table 19).

Table 19. Classification of Performing Arts: Live Music, Theatre, Dance, Circus Related Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
Venue infrastructure	Dedicated performing arts venues	Establishments where performing arts performance is the main focus and with dedicated performing arts programming.
	Multi-purpose venues	Venues for hire, corporate event spaces, smaller sports facilities that host performing arts at least two times a year.

	Occasional venues	Spaces different than venues that occasionally host performing arts (e.g. parks, churches).
	Art venues with music	Galleries, museums and other ‘art’ spaces that occasionally host performing arts.
	Arenas	Large capacity venues (over 2,000 seats) that primarily host sports and performing arts.
	Nightclubs	Nightlife establishments with regular DJ nights and occasional performing arts (e.g. live music) performances.
	Bars, cafés, restaurants with music	Establishments where performing arts (e.g. live music) is performed regularly although their prime function is the sale of food and beverages.
Other support for performing arts	Bookers & programmers	Registered, tax-paying businesses working in performing arts talent booking and event promotion.
	Live events producers	Organizations that present and/or produce artistic performances and events.
	Festivals	Ticketed or free to attend special events and concert series focusing on, or featuring live music programs and happening over one or multiple days.
	Performing arts managers	Person (or organization) who oversees the business affairs of a performing artist.

Below is the classification of the **Visual arts & crafts** sector assets (see Table 20).

Table 20. Classification of Visual Arts & Crafts Related Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
Visual arts creation	Photographers	Establishments known as portrait studios primarily engaged in providing still, video, or

		digital portrait photography services or providing commercial photography services, generally for advertising agencies, publishers, and other business and industrial users.
Crafts creation	Craftsmen	Establishments that manufacture jewelry or other crafts.
Visual arts distribution & exhibition	Art galleries, auctions & dealers	Establishments primarily engaged in retailing original and limited edition artworks created by others, such as art galleries.

Below is the classification of the **Industry support - retail** sector assets (see Table 21).

Table 21. Classification of Industry Support - Retail Related Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
Recording & publishing stores	Record stores	Retail outlet that sells recorded music.
Instruments and equipments	Instrument manufacturers	Establishments specialized in the manufacture of musical instruments.
	Musical instruments & equipment stores	Music instruments, equipment and record stores, including rentals.
Books & press distribution	Book stores	Establishments that retail new books, newspapers, magazines, and other periodicals (without publishing).
	Books & press wholesalers	Establishments engaged in the merchant wholesale distribution of books, periodicals, and newspapers.
Film & video distribution	Film and video stores	Retail outlet that sells film and video.

Below is the classification of the **Other professional & business support** sector assets (see Table 22).

Table 22. Classification of Other Professional & Business Support Related Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
Other professional & business support	Performing arts ticket offices	Agencies that resell tickets for theater, music, or other cultural events.
	Publications & news papers specialized in the cultural & creative sector	Publications, magazines and periodicals specialized in the cultural & creative sector.
	PR & marketers specialized in the cultural & creative sector	Registered, tax-paying businesses working in marketing and social media for the cultural & creative sector.
	Other commercial and administrative support organizations for the cultural & creative sector	Individual companies ranging from accounting or content creation, to photography, event production, sync, publishing and licensing, specialized in the cultural & creative sector.
	Associations and nonprofits for the cultural & creative sector	Associations and nonprofits - associations of artists and/or the cultural & creative sector, nonprofits and charities.

Below is the classification of the **Tourism** sector assets (see Table 23).

Table 23. Classification of Tourism Related Assets

SUB-SECTOR	CATEGORY	DESCRIPTION
Accommodation	Hotels and hostels	Accommodation establishments, such as hotels & hostels, including bed and breakfasts.

5.3 Economic Impact Assessment

The economic impact analysis is based on official secondary sources and statistics, complemented by primary research conducted by Sound Diplomacy. It provides a reliable measure of the economic importance of the Creative Economy in Delaware, on three scales: direct, indirect, and induced impact.

The results in this report correspond with data from 2021. This is due to most official data sources having a three-year delay. During the research process, the most up-to-date data available from the County Business Patterns and RIMS II multipliers was from 2021.

Important note: Due to the availability of official data at the time of the development of this report, the results correspond to the year 2021 and may be affected by COVID-19.

Table 24. Economic Impact Dimensions

ECONOMIC IMPACT	DEFINITION
Direct Economic Impact	The direct impact is the economic value and employment directly generated by the economic activity of the Creative economy.
Indirect Economic Impact	The indirect economic impact measures the ripple effects on the economy, focusing on value and job creation in sectors that form part of the Creative Economy's supply chain. It encapsulates the demand-driven benefits for supporting industries, such as advertising, legal services, and food and beverage suppliers, which are integral to the Creative Economy's operations.
Induced Economic Impact	Induced impact refers to the economic effects generated when the ecosystem's direct and indirect employees spend their wages on goods and services such as food, transportation, and entertainment in their daily lives. This spending stimulates further economic activity within the broader community.

The variables evaluated as part of the Economic Impact Assessment include the ecosystem's output, employment and gross value added (GVA). Definitions of each measure are outlined below.

Table 25. Variables Evaluated in the Economic Impact

VARIABLE	DEFINITION
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Output ¹³⁷	The economic value produced by the sales of goods and services in the ecosystem. For example, concert ticket sales, broadcasting services, etc.
Employment ¹³⁸	The number of active jobs producing goods and services in the ecosystem.
Gross value added (GVA) ¹³⁹	The output minus intermediate consumption (the costs of all inputs – food and beverage suppliers, legal services, transportation, equipment, etc.).

Classifications

To define and frame the creative ecosystem in accordance with available official data, Sound Diplomacy uses The Classification of Economic Activities of the North American Industrial Code System 2017 (NAICS), which is the standard used by federal statistical agencies in classifying business establishments to collect, analyze, and publish statistical data related to the U.S. economy. Sound Diplomacy uses this data to calculate the value of the economic activity in Delaware that can be attributed to the Creative Economy. For more information, please see Appendix 2 - 2017 NAICS Activities for the Creative Economy.

Geographical Scope

This assessment’s geographical scope is the State of Delaware. Additionally, the report is assessing the creative economy of the three counties of the state: Kent County, New Castle County and Sussex County. Furthermore, the economic impact assessment was done for six county subdivisions (cities)¹⁴⁰: Georgetown, Milford, Dover, Smyrna, Middletown, and Wilmington.

Data Sources

Six main data sources have been used to conduct the economic impact analysis.

Table 26. List of Data Sources

¹³⁷ Bureau of Economic Analysis (2020)

¹³⁸ Ibid.

¹³⁹ Ibid.

¹⁴⁰ Due to information constraints, the county subdivision is the most detailed subregional level achievable, which is closely aligned with the cities being represented and, in some cases, identical.

DATA SOURCE	DETAILS
County Business Patterns: 2021	This source allows the calculation of the number of establishments and employees in the ecosystem.
Quarterly Census of Employment and Wages 2022	This source provides complementary data for the number of employees in the ecosystem. It is the source for the Location Quotients provided in this analysis.
BEA Regional Economic Accounts GDP by State 2016 - 2021	This source provides GDP data by industry at the state and metropolitan levels.
Regional Input-Output Modeling System (RIMS II) ¹⁴¹	RIMS II provides both Type I and Type II regional input-output multipliers to estimate the indirect and induced economic impact of the NAICS economic activities. Type I multipliers account for the direct and indirect impacts based on the economic dynamics of the ecosystem supply chain. Type II multipliers account for both indirect and induced impacts based on the purchases made by employees of the ecosystem.
American Community Survey 2016 - 2021	This source provides data on the income related to jobs and economic activities associated with the ecosystem across several characteristics.
Mapping Dataset	The mapping dataset provides ancillary data that allows Sound Diplomacy to identify missing data points.

5.4. Survey

Sound Diplomacy and Delaware Arts Alliance developed an online survey distributed to local creatives and artists, creative and cultural-related businesses and organizations, and cultural

¹⁴¹ See definitions in Appendix 1

audiences in Delaware. The sampling method was non-probabilistic by volunteers.¹⁴² The results of this survey serve as a complement to the qualitative findings within the overall study.

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.¹⁴³

The survey was organized using the following modules:

Table 27. Survey Modules

SECTION	DESCRIPTION
1. Introduction	The questions included in this section were intended to classify respondents according to their broader role in the Delaware creative economy..
2. Characteristics of Creatives and Artists	This section was designed for members of the creation link. The questions were intended to better understand the characteristics of their creative activity, including the percentage of income derived from creative and cultural-related activities, and whether it's enough to cover their basic needs, among others.
3. Characteristics of Businesses and Organizations	This section was designed for business or organization owners, CEOs or General Managers (from the production, distribution, exhibition and transversal links) to better understand the characteristics of their organizations, such as the percentage of revenue derived from creative and cultural-related activities.

¹⁴² Individuals were selected based on non-random criteria, and not every individual had a chance to be included due to the approach being an online survey, where people volunteer themselves to respond. As a result, there is a higher risk of bias in the sampling. Nonetheless, each survey respondent was classified as part of one of the 3 segments: creatives and artists, creative and cultural-related businesses and organizations, and cultural audiences. Business and organizations' responses were weighted against the proportion of assets identified in the mapping exercise, which is another element of the overall study (see Delaware mapping analysis). Cultural audiences' responses were weighted according to the age composition of Delaware's population.

¹⁴³ The sample for creatives and artists was made up of 127 observations (considering complete and partial responses). The sample of businesses and organizations was made up of 56 observations (considering complete and partial responses). Though not representative, these observations, when weighted, are used to give an indication of their trends and characteristics. The sample of cultural audiences was made up of 153 observations.

<p>4. Value Chain</p>	<p>This section explored respondents’ perception of the creation, production, distribution, exhibition and transversal support links in terms of the level of relevancy for their success, as well as their perception of the quality and availability of each link.</p>
<p>5. Perspectives on Regulations and Policies that Impact the Creative Economy</p>	<p>This section explored the procedures, taxes, and sources of financing that create challenges for the creative economy.</p>
<p>6. Cultural Tourism</p>	<p>This section aimed to understand how creatives and organizations perceive the role of the tourism sector within the creative economy and what their relationship is.</p>
<p>7. Local Cultural Audiences</p>	<p>In this segment, questions explored respondents' interest in several cultural sectors and their perception of the availability and quality of the links in the value chain, among others.</p>

Respondents to the survey were classified according to the following groups.

- **Creatives:** includes creatives and artists from a wide range of different creative and cultural sectors, who make up the creation link in the value chain.
- **Companies and Organizations:** includes creative and cultural-related companies and organizations, such as publishers and distributors, managers and agents, live performing venues, broadcasters and cultural educators, who make up the links of production, distribution, exhibition, and transversal support in the value chain.
- **Cultural Audiences:** residents of Delaware who participate in the local creative and creative economy.

The first two groups constitute the supply of goods and services in the local ecosystem (creatives/artists and companies/organizations), and the third encompasses the local demand for goods and services (cultural audiences). These three groups interact with one another throughout the value chain of the creative and cultural sector. The level of cohesion between each link in this value chain is essential for the success and health of the overall creative economy.