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Creative Economy 2026 Economic Update

Delaware Arts Alliance

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1. Introduction	3
2. Key Findings	4
2.1 Cross-Cutting Findings	4
2.2 Mapping	5
2.3 Economic Impact	7
3. Methodology	8
3.1 Mapping	8
3.2 Economic Impact	11
4. Mapping Analysis	12
4.1 Evolution from 2023 to 2026	13
2026 Distribution by County	19
2026 Distribution by County Subdivision (City)	27
Identifying Spatial Patterns to Strengthen Connections Between Culture and Tourism	34
5. Economic Impact Analysis	40
5.1 Evolution from 2021 to 2024	40
5.2 Five-year outlook (2025–2029)	45
Appendices	47
Appendix 1. Asset Definitions	47
Appendix 2. Instructions to use the creative ecosystem interactive asset map	55
Appendix 3. Economic Definitions and Key Concepts	56

1. Introduction

This report provides an update on economic data since the 2023 Delaware CREATE Plan. With a focus on where Delaware's creative economy stands today in terms of physical infrastructure; identifying areas of growth since the strategy was completed and targeted investment and advocacy has been undertaken in the state. Alongside this, an update to the economic impact numbers is provided.

Using the latest available data from 2024, Sound Diplomacy supplies the Delaware Arts Alliance, other key leading bodies, and the creative industries themselves with the evidence to continue promoting and advocating for the significance of Delaware's creative economy. The original study measured the sector for 2021; this update brings the full set of impact estimates to the most recent official data, so that the emphasis falls on how the creative economy has evolved. It reports employment, output and gross value added (GVA) for 2024 alongside the 2021 figures, quantifies the direct, indirect and induced effects for both years, sets the sector against the wider Delaware economy, and closes with a five-year forecast to 2029. Throughout, 2021 and 2024 are shown side by side so the change is the primary reading.

The exercise preserves the original study's baseline and sector definition rather than rebuilding them. Direct employment is evolved from the 2021 baseline using the Quarterly Census of Employment and Wages (QCEW), complemented by the Occupational Employment and Wage Statistics (OEWS) as an occupational lens. Output, GVA and the three effects are then recomputed for 2024 with the latest BEA RIMS II multipliers for Delaware, holding the national value-added coefficient of the original study. Sources, methods and limitations are set out in the Methodology section.

2. Key Findings

2.1 Cross-Cutting Findings

1. Two independent aspects that agree on where Delaware's creative economy is growing.

The asset mapping and the employment data point the same way sector by sector. Performing Arts is the clearest case: mapped assets rose 108% between 2023 and 2026 and direct employment rose 79.6% between 2021 and 2024, the strongest gain in both datasets. Visual Arts and Crafts and Artistic Creation and Performance also grew on both measures. As the data sources are different, the correlation between the two increases confidence in the growth reflecting real change on the ground.

2. The sectors with the most assets are not the sectors with the most jobs.

The asset map is led by Design & Creative Services (647 assets) and Visual Arts and Crafts (490), both dominated by sole practitioners and photographers. The employment and output weight, however, sits elsewhere: Audiovisual & Interactive Media is the largest employer, with 2,207 direct jobs and \$1.58 billion in total output, despite ranking only fourth by asset count, and Cultural Education is the second largest employer. Asset counts measure the breadth and visibility of the ecosystem; employment and GVA measure its economic weight. A high number of assets should not be read as a proxy for economic scale.

3. The fastest-growing sector rests on the most fragile physical base.

Performing Arts leads growth on both the asset and the employment measures, yet only 15% of its venues are dedicated performing-arts spaces; the rest are occasional venues (33%) and bars, cafés and restaurants with live music (29%). The sector carrying the strongest recovery depends on hospitality and multi-use spaces it does not control. This is a direct policy implication: protecting and developing dedicated cultural infrastructure would secure the growth the employment data is already capturing.

4. Culture and tourism already co-locate, giving a concrete starting point for joint strategy.

The mapping identifies three territorial culture-and-tourism clusters: a coastal cluster in Sussex around Lewes and Rehoboth, an urban network in northern New Castle around Wilmington, and a corridor around Dover in Kent. Tourism makes up 24% of the mapped base in Lewes, the strongest case. This spatial overlap is where the creative economy's \$3.9 billion in output and the adjacent hospitality sector reinforce each other.

5. Where the two datasets diverge, the divergence is itself the finding.

In a few sectors mapped assets rose while employment did not, notably Books & Press (assets up, direct employment down 4.9%) and Other Professional & Business Support. Part of the 2026 asset increase comes from a stronger mapping process, including wider sources, a harmonized taxonomy, better deduplication, and improved online visibility. For these sectors the employment signal is the more reliable read of economic change, and reading the two lenses against each other flags precisely which growth is real activity and which is better measurement.

2.2 Mapping

Creative-related assets are included and mapped on [this](#) interactive map developed specifically for the State of Delaware.

1. Delaware's creative and cultural base is distributed across a wide range of sectors and categories.

The 2026 mapping identifies 3,445 assets across 67 categories. No sector holds more than 19% of the total: Design & creative services (647), Visual arts & crafts (490), Performing arts (452), and Audiovisual & interactive media (362) together account for 57%. The largest single category, Photographers, is only 12% of the total, and 47% of all assets sit outside the twelve largest categories. These findings reflect a diverse creative and cultural ecosystem, with activity distributed across multiple sectors and categories.

2. Delaware's live cultural infrastructure relies on shared and hospitality spaces rather than dedicated venues, which makes it fragile.

Performing arts is the sector most defined by physical spaces: 80% of its assets are venues. But most of those venues are not purpose-built cultural infrastructure. Of the 362 mapped venues, only 55 are dedicated performing arts venues (15%), while 119 are occasional venues and 105 are bars, cafés, and restaurants with live music (29%). Much of the state's live performance therefore depends on hospitality and multi-use spaces that host culture alongside their main business.

3. Assets are concentrated in the north, with urban and coastal clusters that each have their own profile.

New Castle County holds about half of all mapped assets (51%), against 30% in Sussex and 18% in Kent. The largest concentrations are Wilmington (404), Dover (390), and Lewes (354), each with a distinct focus: Wilmington leads in performing arts, Dover in design and audiovisual, and Lewes combines tourism with performing arts and design.

4. The strongest growth between 2023 and 2026 is concentrated in a few sectors, led by performing arts, and is broadly confirmed by employment data.

The mapped base grew from 2,534 to 3,445 assets (+36%). The largest increases are in Performing arts (+108%), Artistic creation & performance (+50%), and Visual arts & crafts (+35%). Employment data for Delaware's creative economy (QCEW, 2021 to 2024) moves in the same direction for these sectors, which suggests the growth reflects real change on the ground. Part of the overall increase also comes from a stronger mapping process in 2026: wider sources, a harmonized taxonomy, better deduplication, and improved online visibility. This is clearest in a few sectors, such as Other professional & business support and Books & press, where mapped assets rose but employment did not, so those specific increases should be read with more caution.

5. Each county specializes in a different part of the creative economy, not just a smaller share of the same mix.

Beyond the overall concentration in the north, the three counties have measurable and distinct vocations. Relative to its size, Sussex is strongly specialized in tourism, which is 1.7 times more concentrated there than its share of all assets would predict, and, more modestly, in visual arts and design. New Castle has an established base of production and education activities, particularly in artistic creation and performance, music recording, and cultural education. Kent's creative profile features audiovisual and interactive media, visual arts and crafts, and performing arts as part of its broader cultural landscape.

6. There is a clear starting point for connecting tourism and culture, built around three territorial models.

The 262 tourism assets are all accommodation, and most are in Sussex County (52%). Where they sit next to performing arts and heritage assets, three models appear: a coastal cluster in Sussex (Lewes and Rehoboth), an urban network in northern New Castle (Wilmington), and a corridor around Dover in Kent. Lewes is the strongest case, with tourism making up 24% of its mapped base.

2.3 Economic Impact

1. Delaware's creative economy supported nearly 19,500 total jobs and generated \$3.9 billion in output in 2024.

In 2024, the creative economy supported 19,503 total jobs across direct, indirect, and induced effects, up 5.1% from 18,551 in 2021. Direct employment reached 12,182 jobs, representing a 15.8% increase over 2021. Total economic output reached \$3.9 billion and Gross Value Added (GVA) reached \$2.3 billion, demonstrating significant overall economic contribution to the state.

2. Direct creative employment outpaced overall state job growth and the most traditional Delaware industries.

Between 2021 and 2024, direct creative employment grew by 15.8%, substantially exceeding total employment growth in Delaware (8.1%). The sector grew faster than major established industries including Retail Trade (2.5%), Construction (4.6%), Finance & Insurance (4.8%), Manufacturing (6.9%), and Health Care (13.2%). Creative activities accounted for 2.6% of Delaware's total workforce in 2024, up from 2.4% in 2021.

3. Post-2021 job gains primarily reflect pandemic recovery rather than new long-term expansion.

Direct employment in Delaware's creative economy stood at 12,084 in 2018 before dropping to 10,093 during the 2020 pandemic low. The rise to 12,182 direct jobs in 2024 essentially returns the sector to its pre-pandemic level. Consequently, the rapid percentage gains seen between 2021 and 2024 reflect the rebound of severely affected live performance and event subsectors rather than a sustained structural expansion.

4. Audiovisual & Interactive Media leads total employment and output, while Performing Arts experienced the fastest rebound.

Audiovisual & Interactive Media remained the largest creative employer in 2024 with 2,207 direct jobs (18.1% share) and 4,936 total jobs, generating \$1.58 billion in total output. Performing Arts saw the strongest employment recovery, jumping 79.6% in direct jobs (from 423 to 759) and 89% in total employment. Conversely, Books & Press (-4.9% direct employment) and Music Recording & Publishing (-27.3% direct employment) continued to contract under broader structural industry shifts.

5. Every \$1.00 of direct creative output generates an additional \$0.59 in indirect and induced activity across Delaware.

The sector maintains an output multiplier of 1.59 and an employment multiplier of 1.60 in 2024. Direct output of \$2.46 billion generated an additional \$710 million in indirect supply

chain impacts and \$734 million in induced wage spending, underscoring the creative economy's strong economic links to other local business sectors.

6. Five-year forecasts project central growth to 13,100 direct jobs and 21,000 total jobs by 2029.

Normalizing from the post-pandemic rebound to a baseline annual growth rate of 1.5%, direct employment is forecast to reach 13,123 jobs by 2029 (up 7.7% from 2024). Under this central scenario, total supported employment will expand to approximately 21,000 jobs, with a projected scenario range of 19,500 (low/flat) to 22,600 (high/sustained) total jobs depending on overall macroeconomic conditions.

3. Methodology

3.1 Mapping

The mapping identifies creative related assets with a fixed and verifiable location in the State of Delaware, classifies each by primary function, and georeferences it to County Subdivision (City) and County boundaries. The process combines databases held by the Delaware Arts Alliance with publicly available sector directories and web sources. Records are then cleaned, deduplicated and checked for operating status, so that only unique assets open at the time of collection enter the analysis. The georeferenced database is held in Sound Diplomacy's mapping tool, which also generates the interactive map described in Appendix 2.

Sources and data:

- Delaware Arts Alliance
- Delaware Scene
- Google Maps
- Tripadvisor
- Songkick
- Google web search

The 3,445 assets in the database were compiled from five source types. General web search and Google Maps account for the largest share, at 2,649 assets (77%), followed by records provided by the Delaware Arts Alliance, at 471 assets (14%), Facebook at 200 (6%), Songkick at 64 (2%), and Tripadvisor at 61 (2%). The predominance of general web sources

reflects the mapping's reliance on assets that maintain an online presence, and it is the practical basis for the directory-visibility limitation noted below: activity without a commercial or searchable web footprint is less likely to be captured.

Classification and inclusion criteria

An asset is included where it meets all of the following.

- It has a fixed address within the State of Delaware.
- It was open and operating at the time of data collection.
- It is unique in the database after deduplication.
- Its primary function corresponds to one of the subcategories defined in Appendix 1.

Hospitality venues that host live music

The presence of live music was verified through the venue's official website where available, or through alternative sources that provided evidence of live music performances.

Verification of operating status

Because a substantial share of the records comes from web sources that may not have been updated recently, the operating status of each asset was verified through its official website, where available, or through other sources showing that it remained active. This was particularly important for hospitality venues and small studios.

Data harmonization and comparability

Harmonization aligns the two datasets on classification, but it does not equalize the effort and coverage of data collection between the two years. The 2023 database was re-mapped to the 2026 taxonomy; it was not re-collected using the 2026 sources and search process. As a result, the 2023 to 2026 change combines two effects. Part of it reflects improved coverage: where the 2026 exercise drew on a wider set of sources, more systematic web search, and more thorough verification and deduplication than were applied in 2023, more of the same underlying ecosystem is captured, without new assets appearing on the ground. Part of it, however, reflects real growth in the sectors themselves. This is supported by independent employment data for Delaware's creative economy (QCEW, 2021 to 2024), which moves in the same direction as the mapped increase in several of the largest sectors, including performing arts, artistic creation and performance,

and visual arts. The comparison should therefore be read sector by sector, as a mix of improved coverage and real change, rather than as a single figure of ecosystem growth.

Limitations

The following constraints should be read alongside every figure in this report:

Geocoding. Of the 3,445 mapped assets, 3,260 (95%) were successfully geocoded to coordinates; 186 could not be geocoded and are excluded from the coordinate-based maps. County assignment is based on address rather than coordinates and is available for 3,384 assets, so county totals include a small number of records that do not appear on the coordinate maps. This is why the county tables sum to slightly more than the geocoded base.

Directory visibility bias. Reliance on web and sector directories favors assets that maintain a commercial online presence. Creative activity embedded in community, faith based or cultural institutions is systematically less visible, and where such activity is captured it tends to be recorded under a general purpose subcategory rather than as creative infrastructure.

Presence, not scale. Each asset counts once regardless of size, capacity, turnover or employment. A subcategory with a high count is not necessarily a large part of the sector in economic terms.

Point in time. The database is a snapshot. Venue turnover in hospitality is high, so the live music figures in particular have a shorter useful life than the education or broadcasting figures.

Access the interactive map via this [link](#). The full instructions to use the map are specified in [Appendix 2](#).

Types of analysis available in the interactive map:

- Asset concentration:
 - Cluster Map
 - Assets per sector
 - Assets heat maps by county and County Subdivision (City)
 - Assets map by land use

3.2 Economic Impact

Baseline (2021)

The starting point is the direct-employment baseline built for the 2023 study, which reports 2021 data. That baseline is not a raw official figure: it corrects the classification of the official sources (County Business Patterns) through Sound Diplomacy's own establishment mapping. The update preserves this baseline and evolves it; it does not rebuild the level.

Employment update

The employment trend is taken from BLS QCEW, private ownership, State of Delaware, annual averages for 2018 through 2024. For each NAICS code, employment in a year equals the 2021 baseline times the ratio of that code's QCEW employment in the year to its 2021 QCEW employment. Private ownership is used at both ends of the ratio; the 2017-to-2022 NAICS revision is reconciled through the official crosswalk; and the finest disclosed level of detail is used for each code. 2024 is the anchor and reference year. Occupational figures use BLS OEWS for Delaware (May 2021, 2022, 2024).

Output, GVA and effects (2024)

Output, GVA and the three effects are recomputed for 2024. For each industry, direct output equals direct employment times output per worker, where output per worker is taken from the RIMS II direct-effect and final-demand employment relationship. Direct GVA equals direct output times the national value-added coefficient reused from the 2023 study. The indirect and induced effects are obtained by applying the BEA RIMS II 2024 final-demand multipliers for Delaware (Type I for direct plus indirect, Type II for the total). The engine reproduces the 2023 study's 2021 figures within rounding before it is applied to 2024, which confirms the implementation.

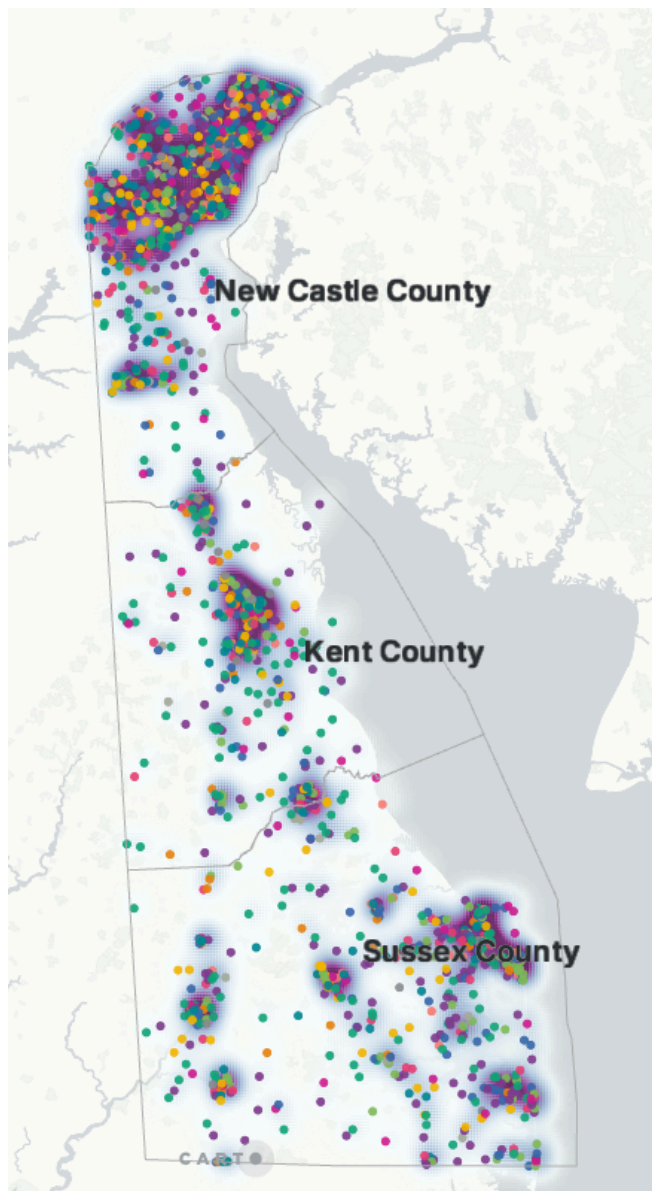
Limitations

The update assumes the 2021 mapping-correction structure and the national value-added coefficient hold over the period. QCEW covers wage-and-salary employment and excludes the self-employed, who are a significant share of some creative activities. In a state of Delaware's size several detailed codes are suppressed and are approximated at a coarser level or by a broader proxy. The 2017-to-2022 NAICS revision merged some retail categories, slightly distorting a few series. Because the RIMS II 2024 multipliers differ from those in the 2021 study, changes in the total effect by industry mix real activity with the

multiplier revision; the direct measures are the cleaner read of real change. The five-year forecast, at state and sector level, carries wide uncertainty and is presented as a range.

4. Mapping Analysis

Figure 1. Delaware Creative Assets heatmap



4.1 Evolution from 2023 to 2026

Since 2023, Delaware's mapped creative and cultural assets grew from 2,534 to 3,445, a net increase of 911 (36.0%). Rather than indicating uniform economic growth, this total blends two distinct drivers that must be analyzed separately:

- Improved coverage: the 2026 exercise used broader sources and more thorough verification and deduplication than the 2023 baseline, meaning that part of the increase is the same ecosystem being captured more completely rather than new activity.
- Real change in the sectors themselves, which is visible where the mapped increase matches independent employment data for Delaware's creative economy, particularly in performing arts, artistic creation and performance, and visual arts.

The sector detail below should therefore be read as a mix of these two effects, not as direct evidence of business formation, closure, employment, or output.

At sector level, the largest positive shifts in mapped counts are Performing arts: live music, theater, dance, circus (+235, 108.3%), Visual arts & crafts (+126, 34.6%), Design & creative services (+124, 23.7%), Artistic creation & performance (+114, 50.0%), and Audiovisual & interactive media (+94, 35.1%). The largest negative shifts are Industry support - retail (-37, -27.8%). These shifts may reflect actual changes in the asset base, but they may also reflect differences in web visibility, source coverage, deduplication, or classification after harmonization.

Like in 2023, dominant sectors today are, Design & creative services, Visual arts & crafts and Audiovisual & interactive media. However, Performing arts: live music, theater, dance, circus forms a greater percentage of the total share of assets (13% in 2026 compared to 8% in 2023). Together, these assets account for approximately 57% of the mapped ecosystem. As before, the distribution indicates that Delaware is not dominated by a single creative sector. The largest, Design & creative services, represents just over one fifth of all assets, while the next three sectors are relatively similar in scale. This produces a comparatively broad creative base spanning design, performing arts, visual arts, and audiovisual and digital activities.

Figure 2. Change in the number of mapped creative and cultural assets, 2023–2026
2023 - 2026

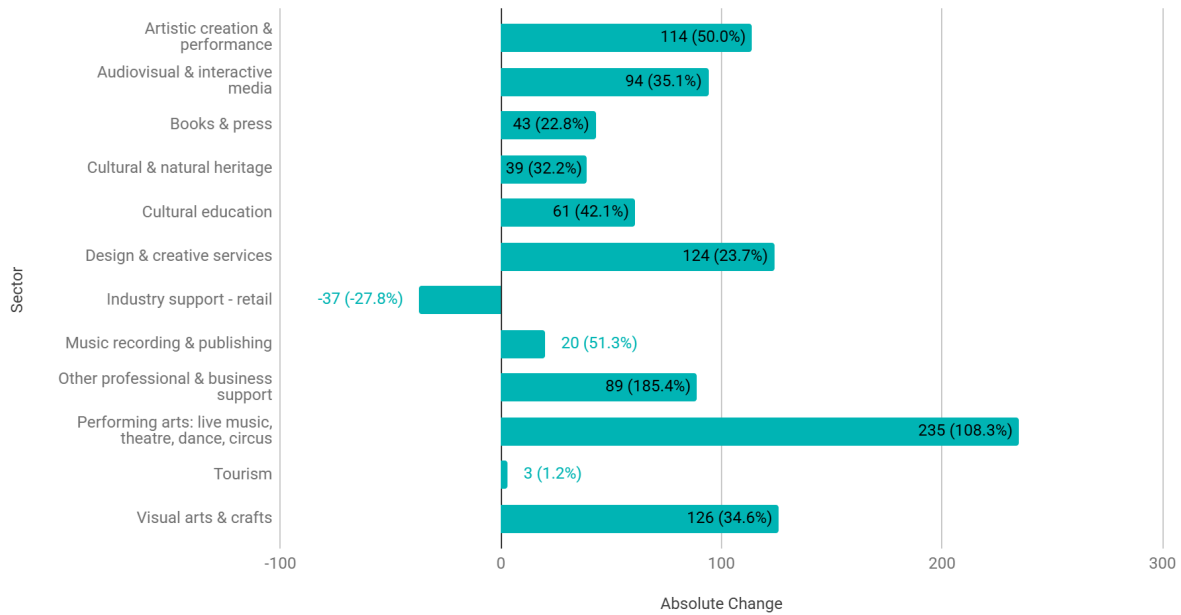


Table 1. Sector evolution 2023 - 2026

Sector	Assets 2023	Assets 2026	2026 Asset Share	Change (no.)	% Change
Performing arts: live music, theater, dance, circus	217	452	13%	235	108.3%
Visual arts & crafts	364	490	14%	126	34.6%
Design & creative services	523	647	19%	124	23.7%

Artistic creation & performance	228	342	10%	114	50.0%
Audiovisual & interactive media	268	362	11%	94	35.1%
Other professional & business support	48	137	4%	89	185.4%
Cultural education	145	206	6%	61	42.1%
Books & press	189	232	7%	43	22.8%
Cultural & natural heritage	121	160	5%	39	32.2%
Music recording & publishing	39	59	2%	20	51.3%
Tourism	259	262	8%	3	1.2%
Industry support - retail	133	96	3%	-37	-27.8%

The largest county-sector increases in absolute terms occurred in Performing arts: live music, theater, dance, circus in New Castle County (+129 assets; +106.6%) and Sussex County (+82; +132.3%). These were followed by Artistic creation & performance in New Castle County (+79; +54.5%), Audiovisual & interactive media in New Castle County (+55; +39.0%), and Other professional & business support in New Castle County (+55; +229.2%). The largest declines occurred in Industry support - retail in New Castle County (-17 assets; -22.7%), Kent County (-11; -50.0%), and Sussex County (-10; -27.8%). Tourism assets declined slightly in Sussex and New Castle counties, with each county losing one asset (-0.7% and -1.3%, respectively). These declines were more than offset by growth in Kent County, where the number of tourism assets increased by five (+11.9%).

Figure 3. Top Five Sector-Level Increases in Mapped Assets Within Each County, 2023–2026

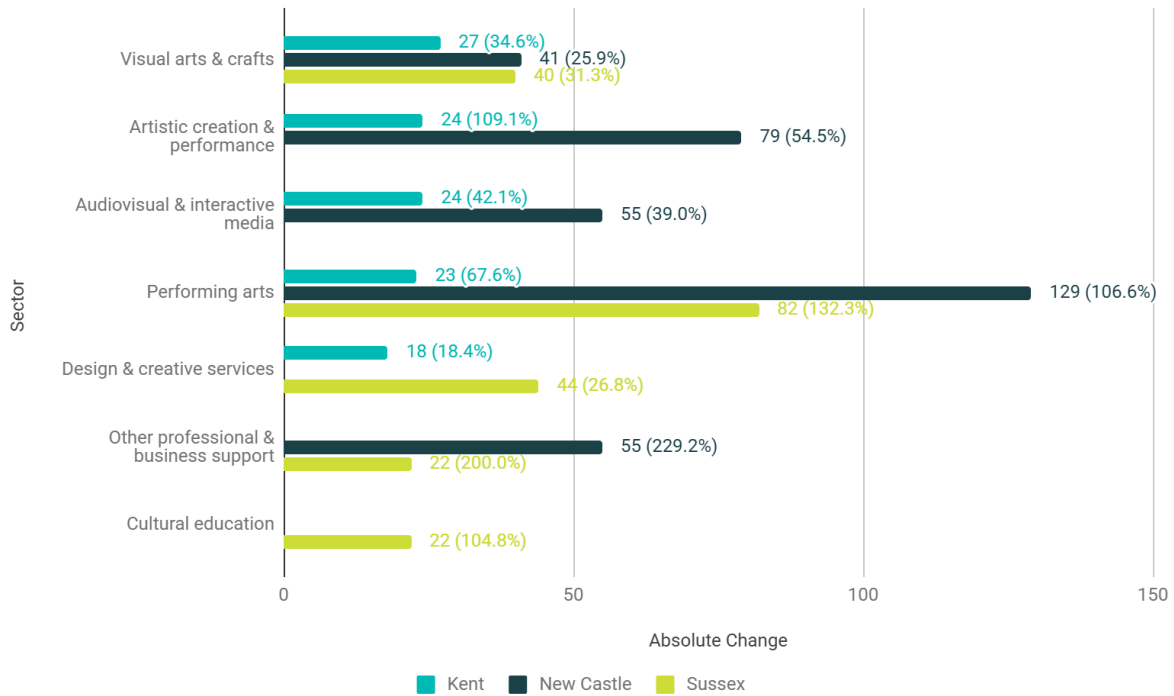
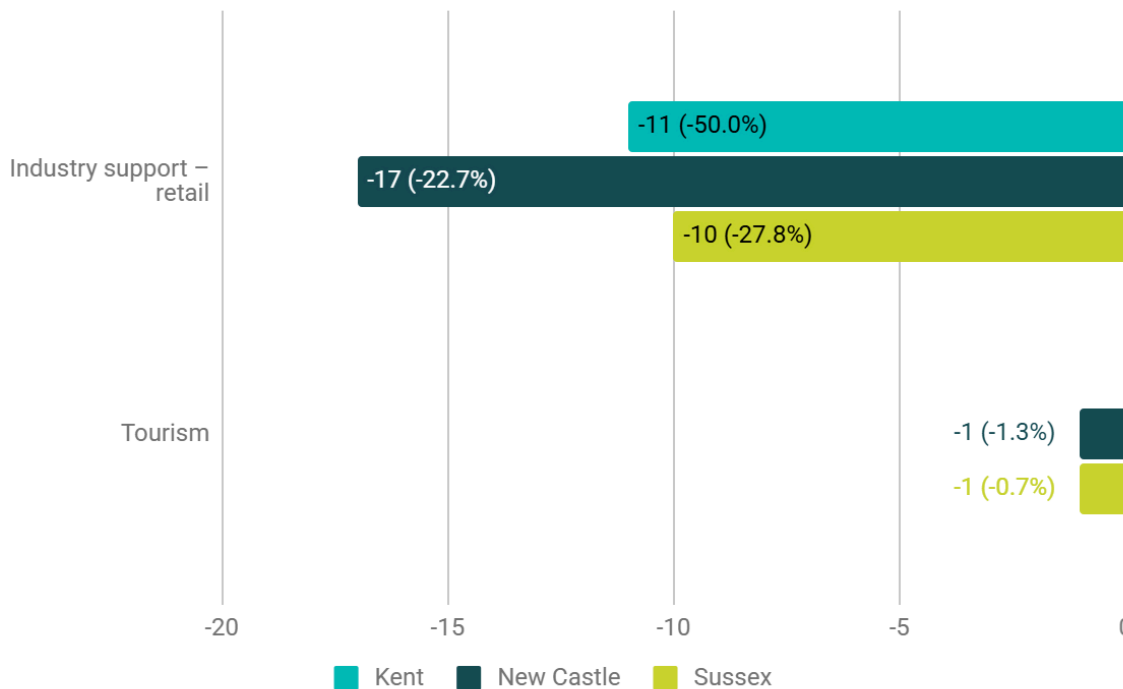


Figure 4. Largest Sector-Level Decreases in Mapped Assets Within Each County, 2023–2026



At the city/town level, the largest sector-specific increases in absolute terms among named cities/towns were concentrated in Performing arts: live music, theater, dance, circus: Wilmington (+37 assets; +78.7%) and Newark (+21; +110.5%). Other substantial increases occurred in Audiovisual & interactive media in Dover (+25; +59.5%), Other professional & business support in Wilmington (+25; +250.0%), and Design & creative services in Dover (+17 assets; +28.3%).

The largest declines occurred in Artistic creation & performance in Wilmington (-44 assets; -60.3%) and Newark (-18; -47.4%), followed by Visual arts & crafts in Newark (-10; -55.6%) and Wilmington (-7; -18.4%). Industry support - retail in Dover (-6). These results describe changes in mapped asset counts and should not, by themselves, be interpreted as evidence of actual local sector expansion or contraction.

Looking at subsectors, in 2026 the five largest are Visual arts creation (438 assets), Venue infrastructure (362), Specialized design creation (316), Accommodation (262), and Books & press publishing (232) – accounting for 1,610 assets, or approximately 47% of all mapped assets. A similar situation emerged in 2023, with Visual arts creation, Specialized design creation, and Accommodation having the most assets. However, where it differs is that

Advertising and Cultural education were part of the top five in 2023. This may be due to the method in data collection.

When assessing the largest subsector in 2026, Visual arts creation (approximately 13% of the mapped total), the assets are distributed across two parent sectors. Visual arts & crafts contains 399 Photographers, representing approximately 91% of the Visual arts creation total. The remaining 39 assets are Visual artists classified under Artistic creation & performance, accounting for approximately 9%. The total should therefore be understood as a combined subsector figure, although most of its assets are concentrated in Visual arts & crafts.

A similar cross-sector structure appears within Cultural & natural heritage. Museums, and Zoos & botanical gardens account for 118 and 42 assets, respectively, producing a combined total of 160 assets within the Cultural & natural heritage sector. The remaining three assets are Restorers of works of art and museum collection objects classified under Artistic creation & performance. Consequently, approximately 98% of the 163 assets recorded under this subsector are located within the dedicated Cultural & natural heritage sector.

Within Design & creative services, Specialized design creation¹ records 316 assets, followed by Advertising with 169 and Architectural creation with 162. Together, these account for 647 assets, or approximately 19% of the mapped total.

Large subsector counts also appear elsewhere in the 2026 classification. Venue infrastructure records 362 assets within Performing arts: live music, theater, dance, circus. Accommodation accounts for 262 assets within Tourism, while Books & press publishing records 232 within Books & press. Cultural education contributes 206 assets within the sector of the same name, and Other professional & business support accounts for 137 within its corresponding sector. This distribution places substantial portions of the mapped asset base across performance infrastructure, tourism, publishing, education, and business support.

Music creation and Performing arts creation are both classified under Artistic creation & performance. They account for 165 and 125 assets, respectively, producing a combined total of 290 assets – approximately 8% of all mapped assets.

¹ Digital design, programming and publishing, despite its design-related name, is classified under Audiovisual & interactive media. Its 121 assets are therefore not included in the Design & creative services subtotal.

Lastly, when looking at the categories (more granular divisions of type of roles within the sub-sectors), in 2026 Photographers remained the lead category (399 assets), followed by Hotels and hostels (262) and Advertising agencies (169), just like we saw in 2023. This time, however, Bands, orchestras & choirs with 151 assets take the place of the fourth largest category.

2026 Distribution by County

The county distribution includes all mapped assets. Most records can be assigned to a county based on their location, while a smaller number remain unassigned because no reliable coordinates are available. This can occur when an asset does not have a fixed physical address, as is often the case for individuals, freelancers, home based or virtual businesses. These unassigned records remain part of the statewide total and are included when calculating county shares.

Figure 5. Delaware heatmap by County

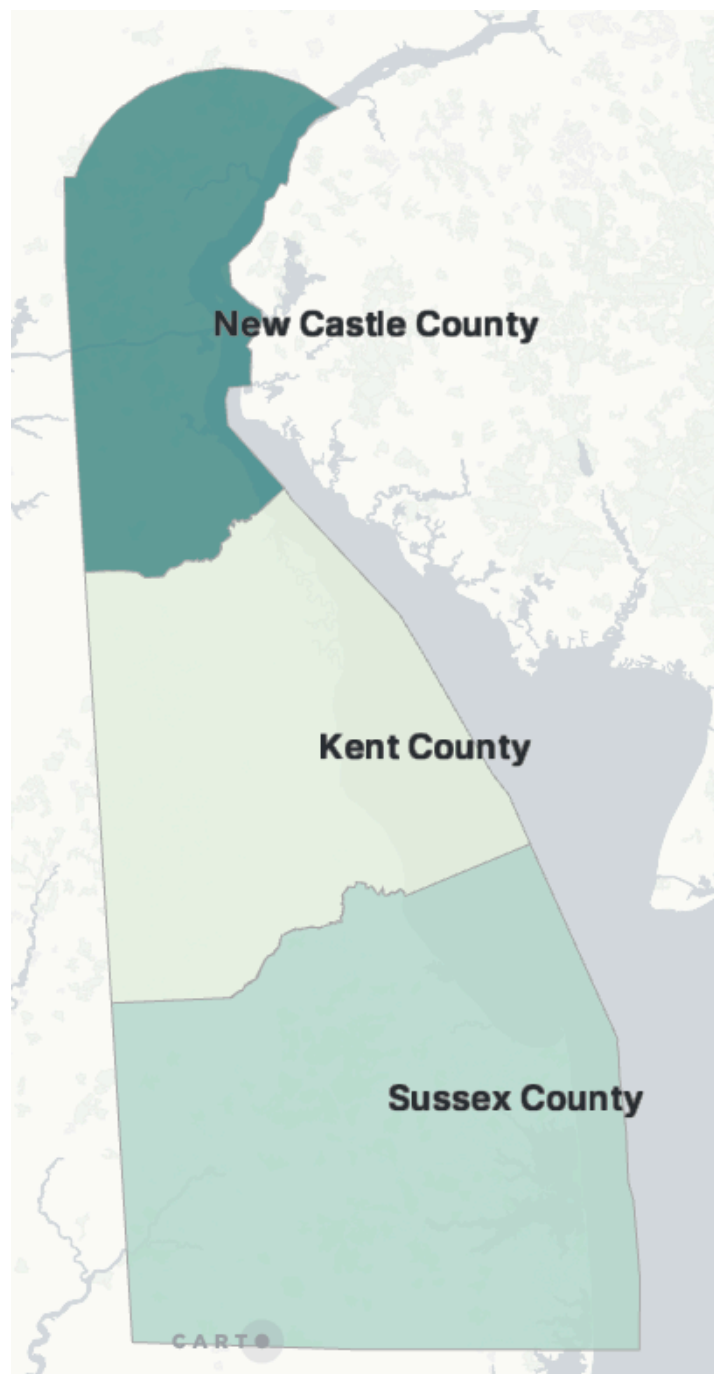


Table 2. Assets by county

County	Assets	Share
New Castle County	1,748	51%
Sussex County	1,025	30%
Kent County	611	18%

The county distribution above shows where assets are located. A location quotient shows where each sector is over- or under-represented relative to the county's overall weight in the state. A value above 1.0 means the sector is more concentrated in that county than its share of all assets would predict; a value below 1.0 means it is under-represented. Each cell below shows the number of assets and the location quotient in parentheses.

Table 3. Sector specialization by county

Sector	New Castle	Sussex	Kent
Design & creative services	295 (0.92)	208 (1.11)	116 (1.04)
Visual arts & crafts	199 (0.82)	168 (1.18)	105 (1.23)
Performing arts: live music, theater, dance, circus	250 (1.07)	144 (1.05)	57 (0.70)
Audiovisual & interactive media	196 (1.06)	81 (0.75)	81 (1.25)
Artistic creation & performance	224 (1.28)	68 (0.66)	46 (0.75)
Tourism	78 (0.58)	137 (1.73)	47 (0.99)
Books & press	124 (1.04)	60 (0.86)	47 (1.13)
Cultural education	129 (1.22)	43 (0.69)	33 (0.89)
Cultural & natural heritage	78 (0.95)	50 (1.04)	31 (1.08)
Other professional & business support	79 (1.13)	33 (0.81)	23 (0.94)
Industry support – retail	58 (1.18)	26 (0.90)	11 (0.64)
Music recording & publishing	38 (1.25)	7 (0.39)	14 (1.31)

Read this way, each county has a distinct profile. Sussex is strongly specialized in tourism (1.73) and, to a lesser degree, in visual arts and design. New Castle concentrates the production and education layers, with artistic creation & performance (1.28), music recording & publishing (1.25), and cultural education (1.22). Kent, although the smallest county, over-indexes in audiovisual & interactive media (1.25) and visual arts & crafts (1.23), while it is the most under-represented in performing arts (0.70). These patterns indicate that the counties are not scaled-down versions of the same ecosystem but hold different creative specialisms.

New Castle County

New Castle County hosts 1,748 mapped assets, representing 51% of Delaware's 2026 analytical base. The county's sector profile is led by Design & creative services, with 295 assets (17%), followed by Performing arts: live music, theater, dance, circus with 250 (14%) and Artistic creation & performance with 224 (13%). Visual arts & crafts and Audiovisual & interactive media contribute a further 199 and 196 assets, respectively, each representing approximately 11% of the county total.

The principal concentrations are Wilmington, with 404 assets (23%); Brandywine, with 215 (12%); Newark, with 195 (11%); New Castle, with 181 (10%); and Middletown-Odessa, with 177 (10%).

Figure 6. Assets Distribution in New Castle County

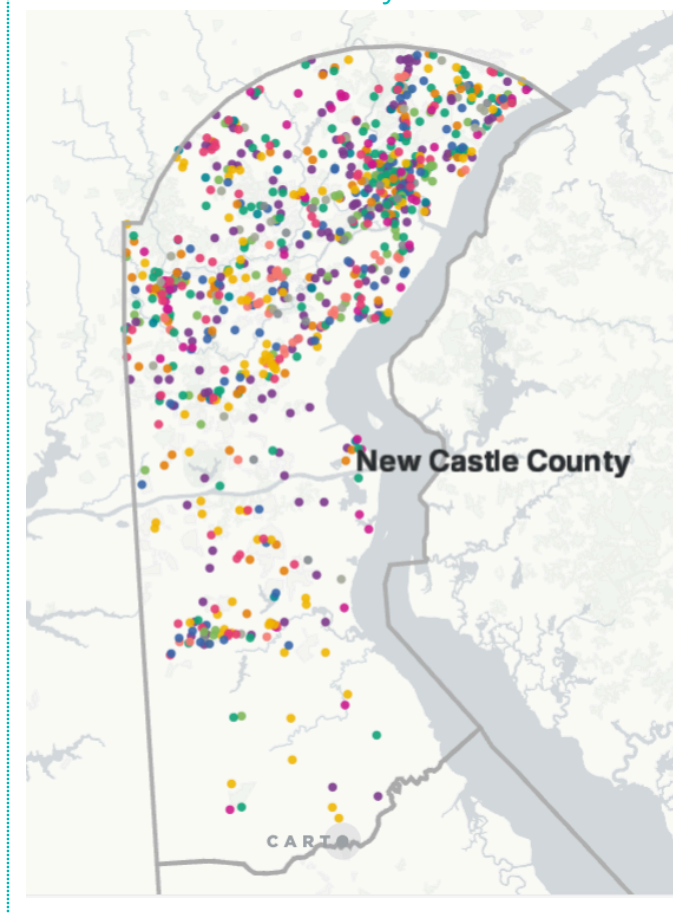


Table 4. Leading sectors in New Castle County

Sector	Assets	Share
Design & creative services	295	17%
Performing arts: live music, theater, dance, circus	250	14%
Artistic creation & performance	224	13%
Visual arts & crafts	199	11%
Audiovisual & interactive media	196	11%
Cultural education	129	7%

Sussex County

Sussex County hosts 1,025 mapped assets, representing approximately 30% of Delaware's 2026 analytical total. The county's sector profile is led by Design & creative services with 208 assets (20%), followed by Visual arts & crafts with 168 (16%), Performing arts: live music, theater, dance, circus with 144 (14%), and Tourism with 137 (13%).

The largest concentration is found in Lewes, with 354 assets (35%), followed by Milton with 165 (16%), Selbyville-Frankford with 141 (14%), Georgetown with 74 (7%), and Milford South with 71 (7%).

Figure 7. Assets Distribution in Sussex County

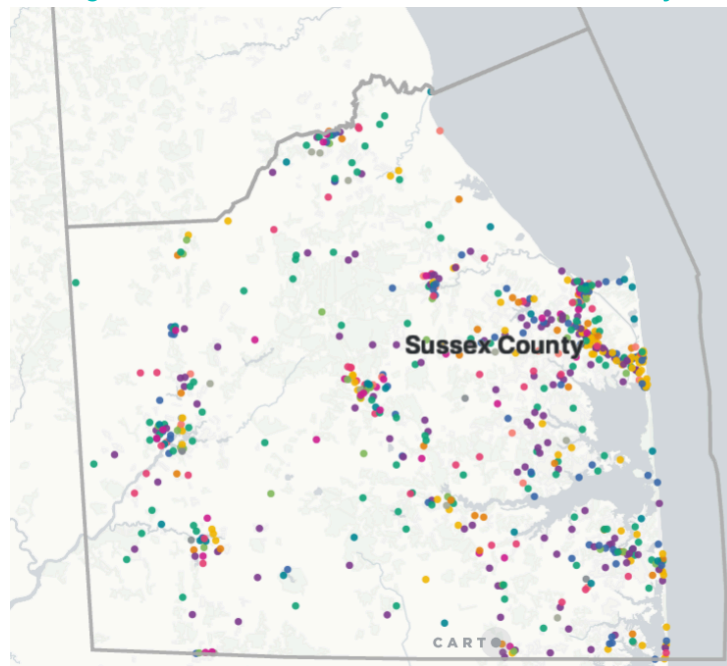


Table 5. Leading sectors in Sussex County

Sector	Assets	Share
Design & creative services	208	20%
Visual arts & crafts	168	16%
Performing arts: live music, theater, dance, circus	144	14%
Tourism	137	13%
Audiovisual & interactive media	81	8%
Artistic creation & performance	68	7%

Kent County

Kent County hosts 611 mapped assets, representing approximately 18% of Delaware's 2026 analytical total. The county's sector profile is led by Design & creative services with 116 assets (19%), followed by Visual arts & crafts with 105 (17%), Audiovisual & interactive media with 81 (13%), and Performing arts: live music, theater, dance, circus with 57 (9%).

The principal concentrations are Dover, with the largest concentration, with 390 assets (64%), followed by Milford North with 70 (11%), Smyrna with 53 (9%), Central Kent with 32 (5%), and Harrington with 23 (4%).

Figure 8. Assets Distribution in Kent County

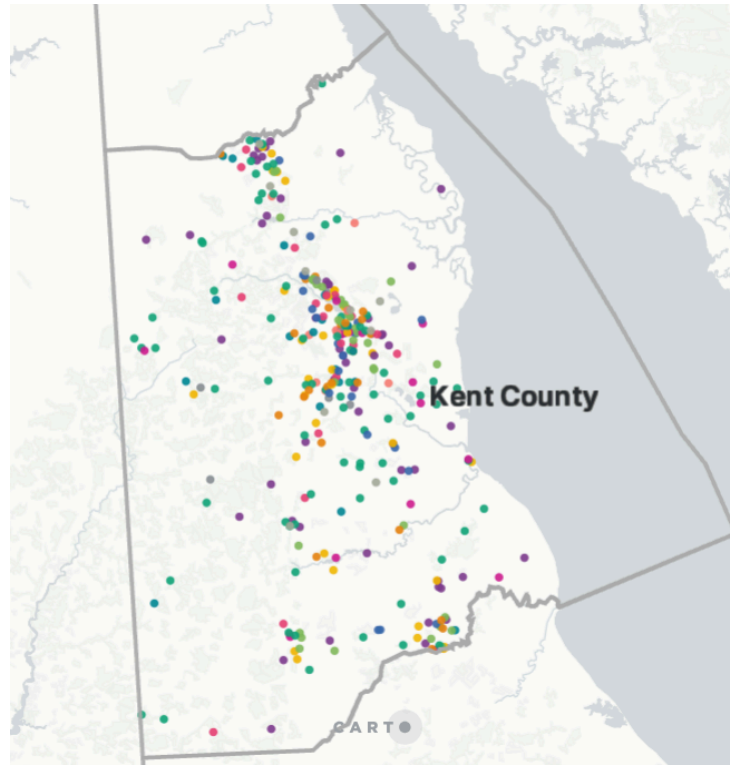


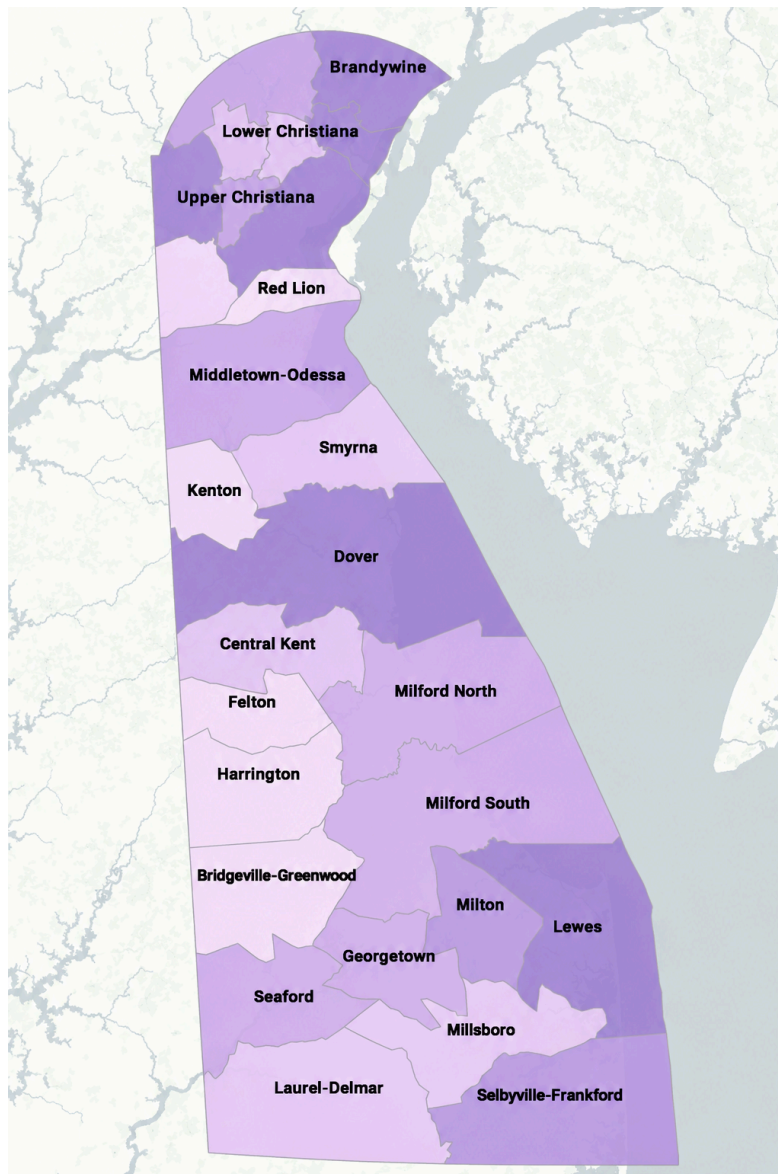
Table 6. Leading sectors in Kent County

Sector	Assets	Share
Design & creative services	116	19%
Visual arts & crafts	105	17%
Audiovisual & interactive media	81	13%
Performing arts: live music, theater, dance, circus	57	9%
Books & press	47	8%
Tourism	47	8%

2026 Distribution by County Subdivision (City)

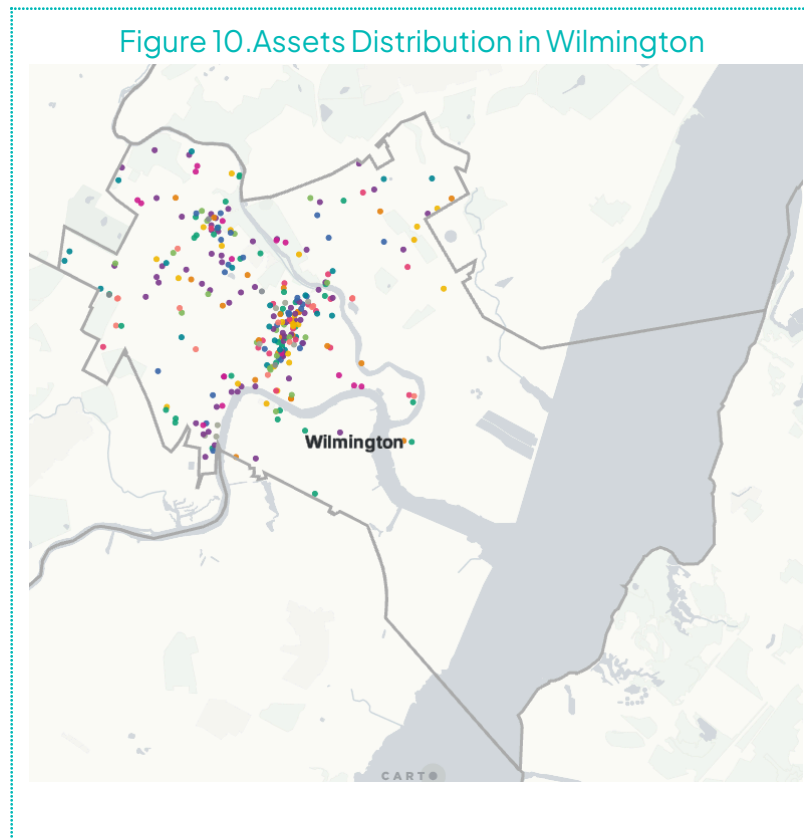
Delving further into the geospatial analysis, we will now analyze the distribution of creative and cultural assets across various cities. The strongest concentrations are Wilmington with 404 assets (12%), Dover with 390 assets (11%) and Middletown-Odessa with 177 assets.

Figure 9. Delaware heatmap by County Subdivision (City)



Wilmington

Wilmington contains 404 mapped assets. Its sector profile is led by Performing arts: live music, theater, dance, circus with 84 assets (21%), followed by Design & creative services with 61 (15%) and Audiovisual & interactive media with 50 (12%). Together, these sectors represent 48% of Wilmington's asset base, while the remainder is distributed across a broad range of creative, cultural, and supporting activities.

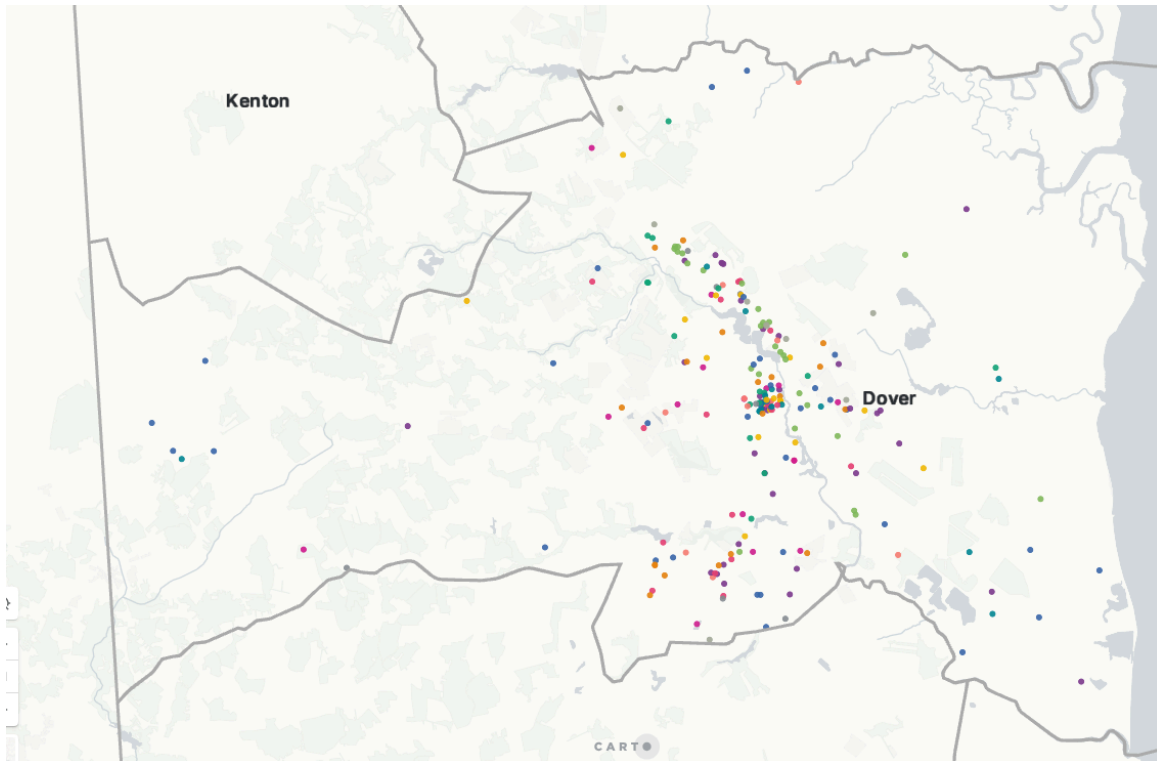


The leading categories are Occasional venues with 29 assets (7%), Associations and nonprofits for the cultural & creative sector with 23 (6%), Public and private schools with cultural & creative programs with 18 (4%), Advertising agencies with 17 (4%), and Photographers with 15 (4%). As these five categories account for only 25% of the total, Wilmington's profile reflects a diverse combination of cultural venues, support organizations, education, and creative production.

Dover

Dover contains 390 mapped assets. Its sector profile is led by Design & creative services with 77 assets (20%), followed by Audiovisual & interactive media with 67 (17%) and Visual arts & crafts with 53 (14%). Together, these sectors represent approximately 51% of Dover's asset base.

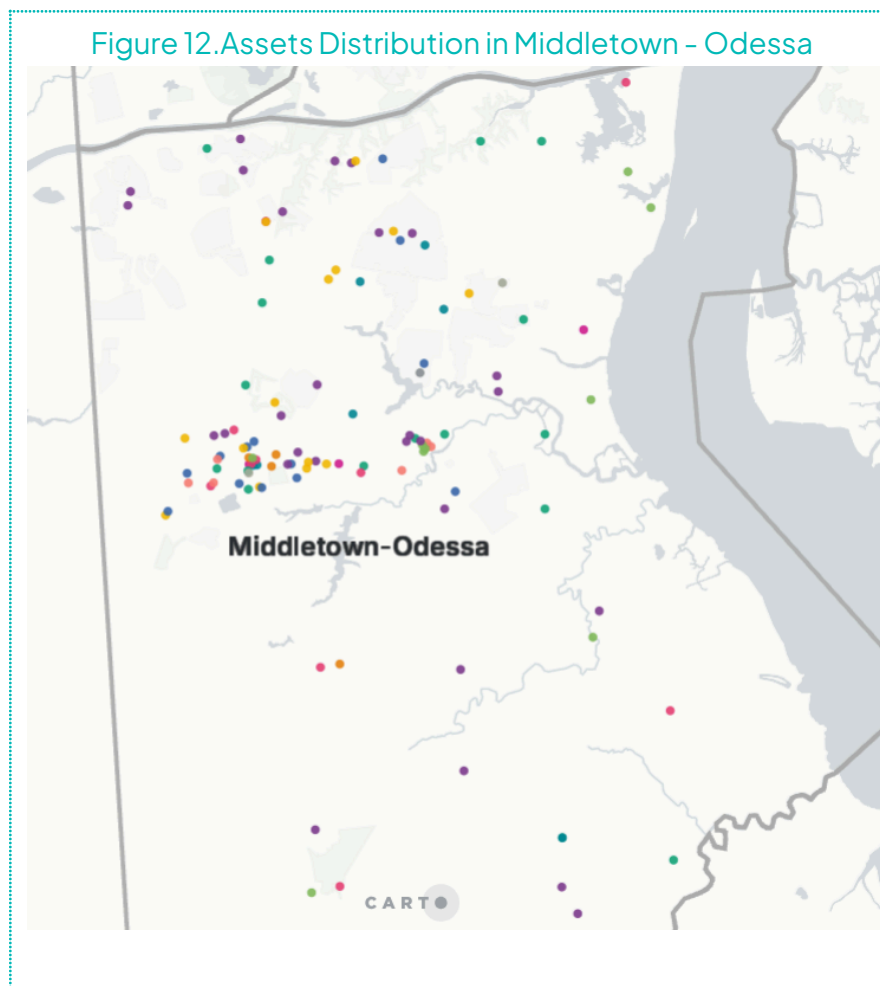
Figure 11. Assets Distribution in Dover



The leading categories are Photographers with 46 assets (12%), Advertising agencies with 36 (9%), Hotels and hostels with 28 (7%), Computer software consultants with 23 (6%), and Museums with 21 (5%). These five categories account for 154 assets, or approximately 39% of the total.

Middletown-Odessa

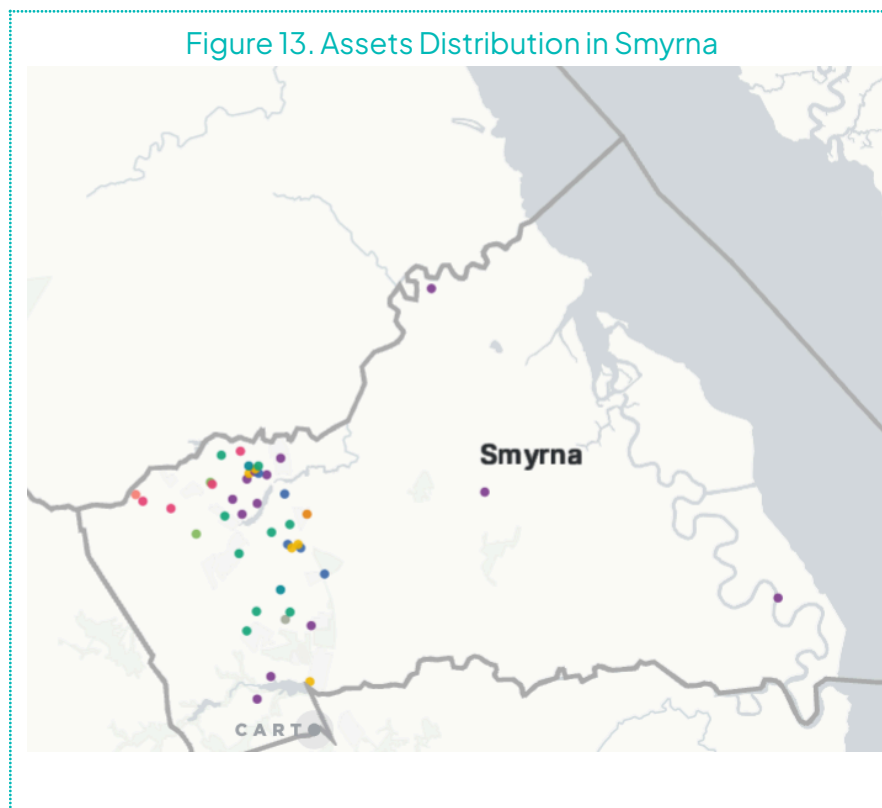
Middletown-Odessa contains 177 mapped assets. Its sector profile is led by Visual arts & crafts with 38 assets (21%), followed by Design & creative services with 36 (20%) and Audiovisual & interactive media with 25 (14%). Together, these sectors represent approximately 56% of the area's asset base.



The leading categories are Photographers with 37 assets (21%), Advertising agencies with 17 (10%), and Private instructors with 10 (6%). Computer software consultants, Web hosting, video and audio streaming organizations, and Museums each contribute seven assets (4%). As Photographers account for 37 of the 38 Visual arts & crafts assets, the sector's prominence is driven almost entirely by photography.

Smyrna

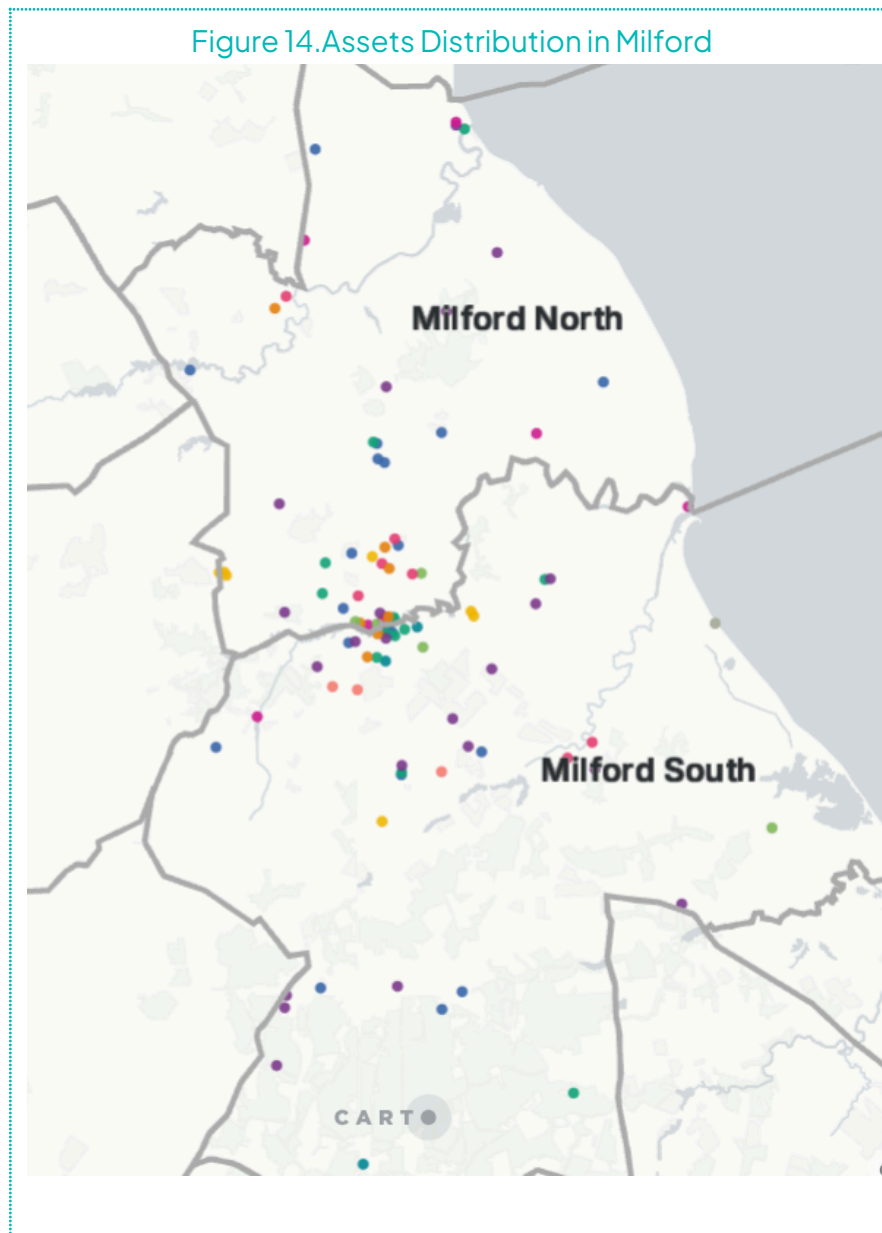
Smyrna contains 53 mapped assets. Its sector profile is led by Design & creative services with 15 assets (28%), followed by Visual arts & crafts with 11 (21%) and Performing arts: live music, theatre, dance, circus with seven (13%). Together, these sectors represent approximately 62% of Smyrna's asset base.



The leading categories are Photographers with nine assets (17%), Hotels and hostels and Advertising agencies with five each (9%), and Graphic designers with four (8%). Performing arts companies (theatre, dance) and Books publishers each contribute three assets (6%). As Photographers account for nine of the 11 Visual arts & crafts assets, the sector's prominence is driven largely by photography.

Milford

Milford contains 141 mapped assets. Its sector profile is led by Visual arts & crafts with 32 assets (23%), followed by Performing arts: live music, theatre, dance, circus with 21 (15%) and Design & creative services with 20 (14%). Together, these sectors represent approximately 52% of Milford's asset base.

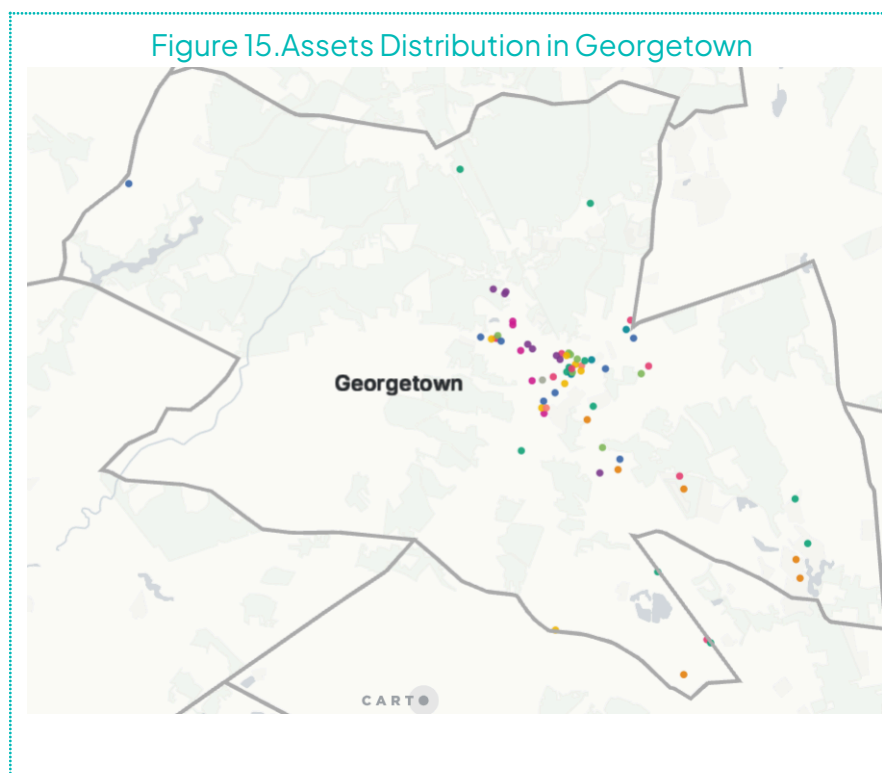


The leading categories are Photographers with 28 assets (20%), Hotels and hostels with 11 (8%), and Occasional venues with eight (6%). Radio stations, Public and private schools

with cultural & creative programs, Bars, cafés, restaurants with music, and Landscape architect organizations each contribute six assets (4%). As Photographers account for 28 of the 32 Visual arts & crafts assets, the sector's prominence is driven largely by photography.

Georgetown

Georgetown contains 74 mapped assets. Its sector profile is led by Audiovisual & interactive media and Design & creative services with 11 assets each (15%), followed by Cultural education with nine (12%). Together, these sectors represent approximately 42% of Georgetown's asset base.



The leading categories are Museums with seven assets (9%), Public and private schools with cultural & creative programs and Photographers with six each (8%), and Libraries & archives, Radio stations, and Hotels and hostels with five each (7%). Associations and nonprofits for the cultural & creative sector contribute four assets (5%). As Museums account for all seven Cultural & natural heritage assets, the sector's prominence is driven entirely by museums.

Identifying Spatial Patterns to Strengthen Connections Between Culture and Tourism

Tourism Assets by County

The 2026 mapping identified 262 tourism assets across Delaware, equivalent to approximately 7.6% of the 3,445 assets in the statewide database. All mapped tourism assets are classified under the Hotels and Hostels category. Of the total, 137 assets are located in Sussex County, representing 52.3% of Delaware's tourism assets. New Castle County contains 78 assets (29.8%), while Kent County contains 47 (17.9%). The concentration in Sussex County is also evident when tourism assets are compared with each county's overall mapped asset base. Tourism represents 13.4% of all mapped assets in Sussex County, compared with 7.7% in Kent County and 4.5% in New Castle County. The contrast is particularly notable because New Castle County contains 50.7% of all assets in the statewide database but only 29.8% of tourism assets. Conversely, Sussex County contains 29.8% of all mapped assets but over half of the tourism assets. Kent County's shares are comparatively balanced: it contains 17.7% of all mapped assets and 17.9% of tourism assets.

Figure 16. Tourism Assets by County

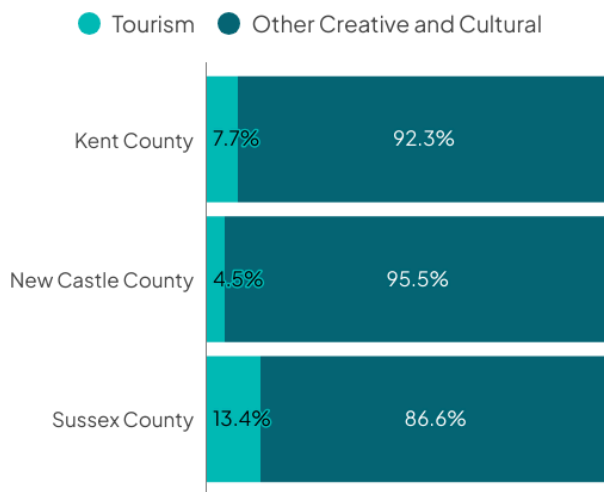
★ **262** Total Tourism Assets in Delaware

★ **137** Assets
in Sussex
County

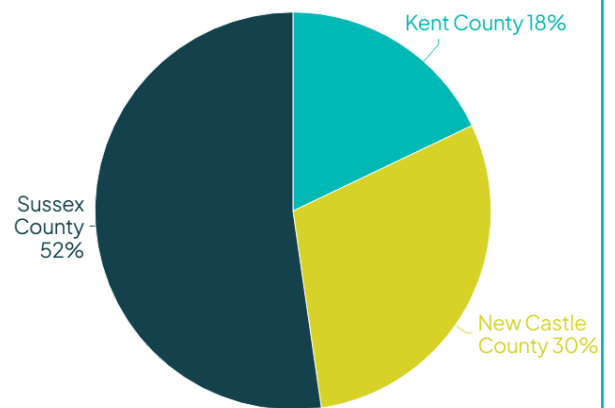
★ **78** Assets in
New Castle
County

★ **47** Assets in
Kent County

Tourism Assets vs. Other Creative and Cultural Assets by County



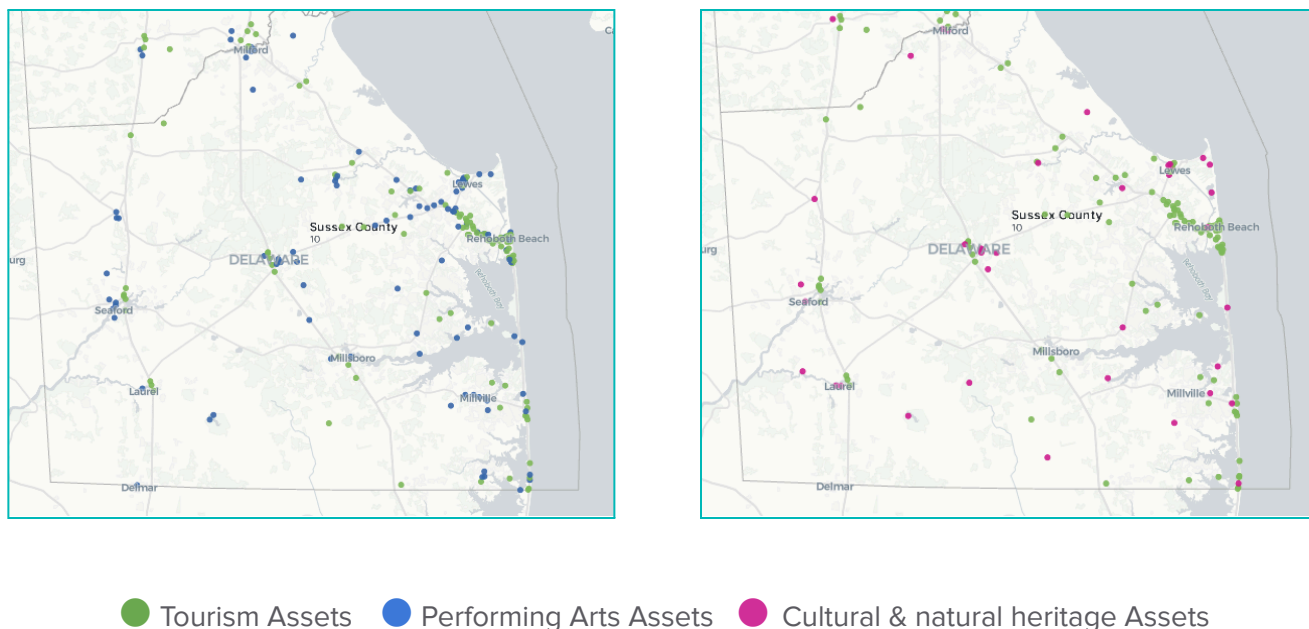
Distribution of Total Tourism Assets by County



Spatial Alignment Between Tourism and Cultural Assets

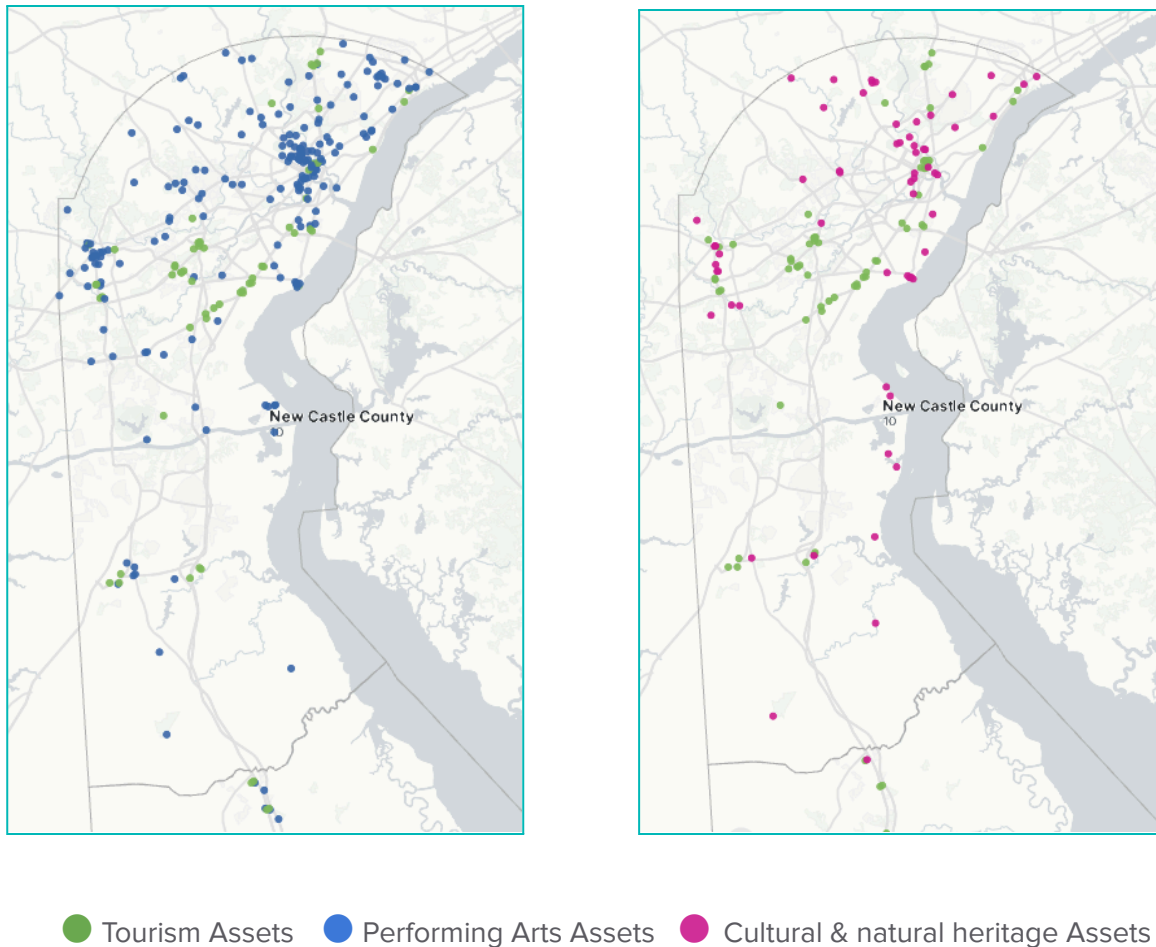
In Sussex County, the strongest visual concentration of tourism assets is located along the eastern coastal corridor, particularly around Lewes and Rehoboth Beach. Figure 7 shows a substantial concentration of performing arts assets in this same area, as well as smaller areas of proximity around Milford and communities in southeastern Sussex County. Tourism and cultural and natural heritage assets also overlap around Lewes, Rehoboth Beach, and several smaller coastal and inland locations, although heritage assets are more dispersed.

Figure 17. Spatial Alignment Between Tourism and Cultural Assets in Sussex County



In New Castle County, tourism, performing arts, and cultural and natural heritage assets are concentrated primarily in the northern and more suburban part of the county. The strongest visual alignment appears around Wilmington and the surrounding urban corridor. Performing arts assets form a particularly dense cluster in this area, while tourism and heritage assets follow a similar, although less concentrated, spatial pattern. All three sectors become more dispersed toward southern New Castle County.

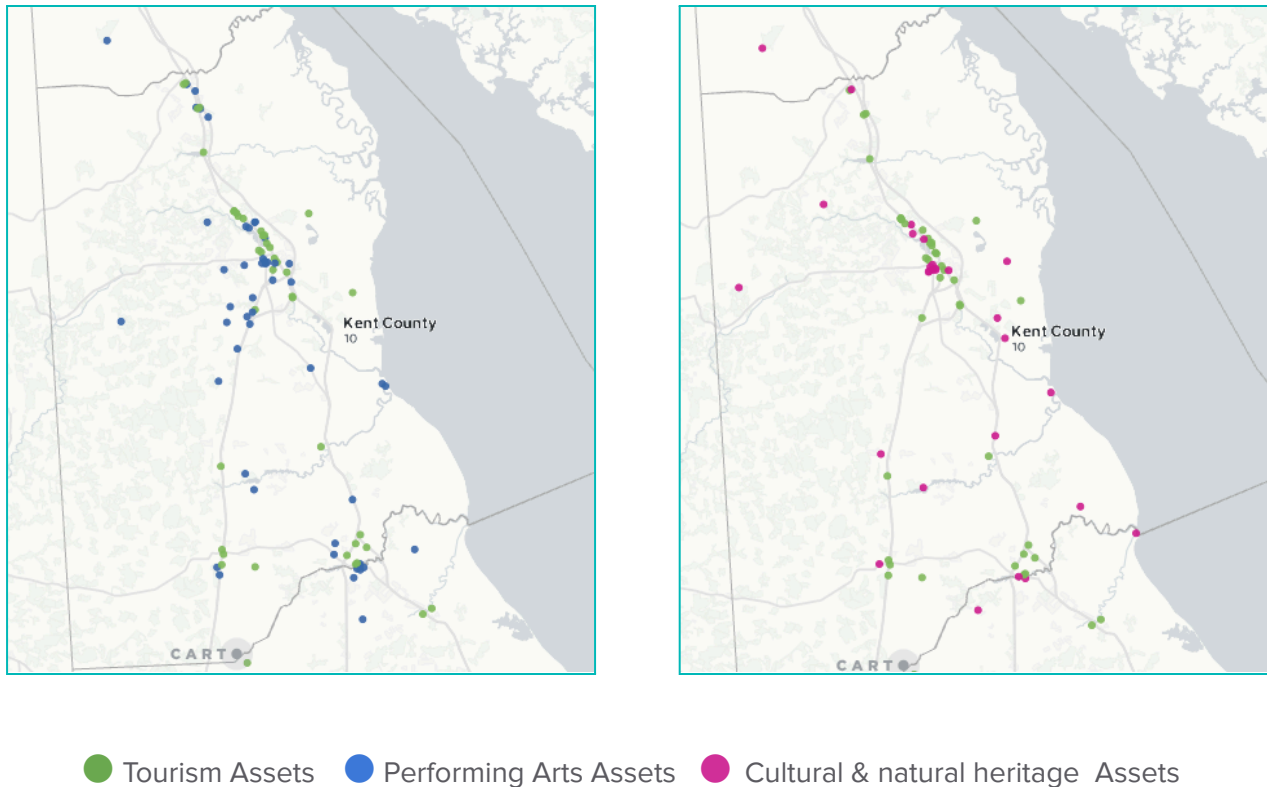
Figure 18. Spatial Alignment Between Tourism and Cultural Assets in New Castle County



In Kent County, the strongest concentration of tourism and cultural assets are around Dover and along the county's central north-south corridor. Performing arts assets are closely concentrated around the principal tourism cluster in the Dover area, while cultural and natural heritage assets display a similar corridor-based distribution. Smaller areas of proximity are also visible in the southern part of the county.

Compared with Sussex County's coastal concentration and New Castle County's northern suburban cluster, Kent County presents a more corridor-based spatial structure.

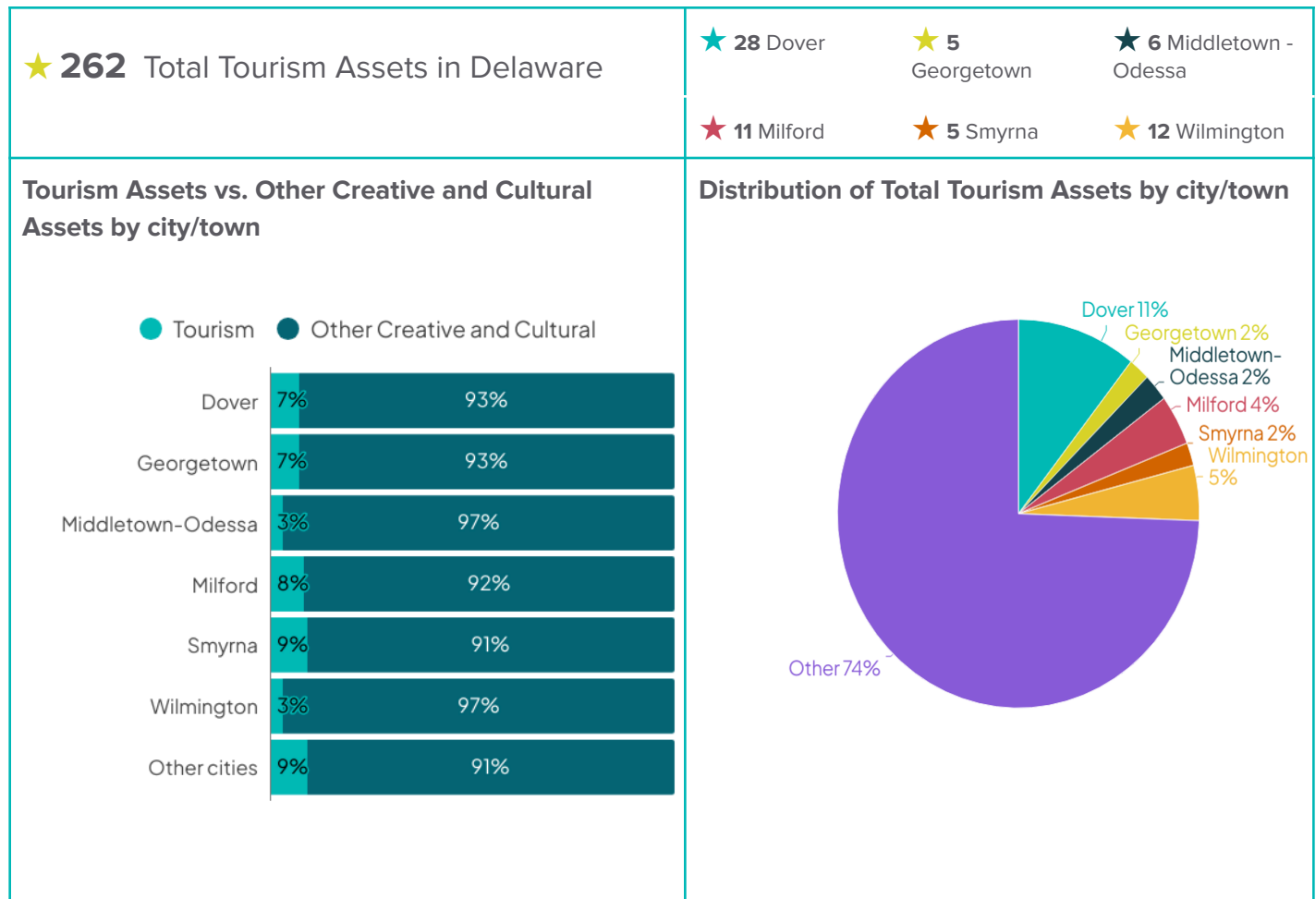
Figure 19. Spatial Alignment Between Tourism and Cultural Assets in Kent County



Tourism Assets by County Subdivision (City)

Examining the tourism landscape in the chosen regions, we identified a total of 67 assets. Dover has the largest number of tourism assets, with 28, followed by Wilmington with 12 and Milford with 11. Middletown–Odessa contains six tourism assets, while Georgetown and Smyrna each contain five.

Figure 20. Tourism and Cultural Assets by Selected County Subdivisions (Cities)



The relative importance of tourism within each city/town provides a different perspective from the number of tourism assets in each location. Tourism represents 9% of all mapped assets in Smyrna, followed by Milford at 8%. Dover and Georgetown each have a tourism share of 7%, while tourism accounts for 3% of the mapped asset base in both Wilmington and Middletown-Odessa. The areas grouped under Other cities also have a tourism share of 9%.

The distinction between absolute scale and relative concentration is important. Dover has the largest number of tourism assets among the selected named areas, with 28, but these account for only 7% of its 390 mapped assets. Wilmington has the largest overall asset base among the selected named areas, with 404 assets, but its 12 tourism assets represent only 3% of the total. By contrast, Smyrna contains only five tourism assets, but these

represent 9% of its smaller asset base of 53. Milford combines a relatively higher tourism share of 8% with 11 tourism assets out of 141 mapped assets.

These results show that the areas with the largest number of tourism assets are not necessarily those where tourism has the greatest relative weight within the local asset base. The figures therefore provide two complementary measures: the absolute scale of tourism activity represented in the mapping and its relative presence within each selected area. Additional information on visitor demand, accommodation capacity, occupancy, seasonality, spending, and cultural participation would be required to assess the economic importance or performance of tourism across these areas.

5. Economic Impact Analysis

In 2024 the Delaware creative economy supported 19,503 jobs (direct, indirect and induced), up from 18,551 in 2021. Direct employment rose faster, from 10,520 to 12,182 (+15.8%). Total output reached \$3.9 billion and total GVA \$2.3 billion, both in real terms. The sector also grew as a share of the state workforce, from 2.4% to 2.6% of total employment, outpacing most other industries in Delaware.



5.1 Evolution from 2021 to 2024

The table below gives the total effect (direct, indirect and induced) by the creative industry for both years. Total employment is shown for 2021 and 2024 with the change; total output and GVA are shown for 2024, with the full 2021 breakdown available in the accompanying workbook. Industries are ordered by 2024 total employment.

Table 7. Total economic impact by industry (direct + indirect + induced).

Industry	Total Employment 2021	Total Employment 2024	Change 2021 vs 2024	Total Output 2024	Total GVA 2024
Audiovisual & Interactive Media	4,678	4,936	+6%	\$1,580m	\$907m
Cultural Education	2,391	2,500	+5%	\$358m	\$232m
Design & Creative Services	1,932	1,968	+2%	\$351m	\$227m
Books & Press	3,067	1,904	-38%	\$356m	\$215m
Visual Arts & Crafts	1,246	1,724	+38%	\$261m	\$157m
Industry Support - Retail	1,543	1,621	+5%	\$228m	\$136m
Cultural & Natural Heritage	1,367	1,497	+9%	\$259m	\$153m
Other Professional & Business Support	1,262	1,179	-7%	\$270m	\$145m
Performing Arts: Live Music, Theatre, Dance	534	1,008	+89%	\$102m	\$58m
Artistic Creation & Performance	394	602	+53%	\$57m	\$37m
Festivals, Fairs & Conventions	68	486	+616%	\$47m	\$26m
Music Recording & Publishing	71	78	+10%	\$38m	\$27m
Creative Economy	18,551	19,503	+5%	\$3,905m	\$2,320m

5.1.1 The multiplier and the three effects

Breaking down the total into its three effects shows where the growth sits. Output, employment and value added all rose between 2021 and 2024. The direct effect, the activity of the creative industries themselves, leads to the increase; the indirect effect

(activity along the sector's supply chain) and the induced effect (spending of the wages earned in the sector) add to it. All money figures are in real terms, constant 2017 dollars².

Table 8. Direct, indirect and induced effects, 2021 and 2024

Effect	Emp 2021	Emp 2024	Output 2021	Output 2024	Total GVA 2021	Total GVA 2024
Direct	10,520	12,182	\$2,338m	\$2,461m	\$1,314m	\$1,390m
Indirect	4,021	3,303	\$745m	\$710m	\$468m	\$491m
Induced	4,010	4,018	\$666m	\$734m	\$394m	\$439m
Total	18,551	19,503	\$3,748m	\$3,905m	\$2,176m	\$2,320m

Output and GVA in USD million, constant 2017 prices (real terms)

In real terms, the creative economy added 1,662 direct jobs (+15.8%) and 952 jobs to the total effect (+5.1%) between 2021 and 2024, while output rose by \$157m (+4.2%) and value added by \$144m (+6.6%).

For every \$1 of creative output, a further \$0.59 is generated across the rest of the Delaware economy.



Output multiplier = 1.59

² The employment multiplier (total ÷ direct) eased from 1.76 in 2021 to 1.60 in 2024, and the output multiplier from 1.60 to 1.59, following the lower BEA RIMS II 2024 supply-chain (Type I) multipliers for Delaware. The total effect therefore grows more slowly than direct employment.

5.1.2 Recovery, not new growth

Placed in a longer series, the rise since 2021 is best understood as a recovery. Direct employment was 12,084 in 2018, fell to a low of 10,093 in 2020 during the pandemic, and by 2024 had essentially returned to its pre-pandemic level. Across the full 2018 to 2024 cycle the sector is broadly flat. The large percentage gains after 2021 therefore reflect the rebound of activities that had contracted sharply, particularly live performance and festivals, rather than sustained expansion.

Table 9. Direct and Total Employment 2021, 2024

Year	Direct Employment	Total Effect	Notes
2018	12,084	—	pre-pandemic
2020	10,093	—	COVID-19 trough
2021	10,520	18,551	Report base year
2024	12,182	19,503	Report year

5.1.3 Sector highlights

Audiovisual and Interactive Media remained the largest creative employer, with more than 2,200 direct jobs in 2024. Performing Arts (live music, theatre, dance) posted the strongest recovery from their 2020–2021 lows. Cultural and Natural Heritage and Cultural Education also gained. Books and Press and Music Recording and Publishing continued to decline, consistent with longer-term structural pressures in publishing and recorded media.

Table 10. Direct employment and change by creative sector, Delaware, 2021 and 2024

Creative sector	Direct 2021	Direct 2024	Δ 21→24	Share 2024
Audiovisual & Interactive Media	1,852	2,207	+19.2%	18.1%
Cultural Education	1,681	1,758	+4.6%	14.4%
Design & Creative Services	1,244	1,292	+3.9%	10.6%
Books & Press	1,355	1,288	-4.9%	10.6%
Visual Crafts & Arts	925	1,231	+33.1%	10.1%
Industry Support - Retail	1,083	1,164	+7.5%	9.6%
Cultural & Natural Heritage	871	983	+12.8%	8.1%
Performing Arts (live music, theatre, dance)	423	759	+79.6%	6.2%
Other Professional & Business Support	658	610	-7.3%	5.0%
Artistic Creation & Performance	322	487	+51.3%	4.0%
Festivals, Fairs & Conventions	56	366	+558%	3.0%
Music Recording & Publishing	50	37	-27.3%	0.3%
Total direct	10,520	12,182	+15.8%	100%

Direct employment by creative sector, 2021 baseline evolved with QCEW. Sorted by 2024 employment.

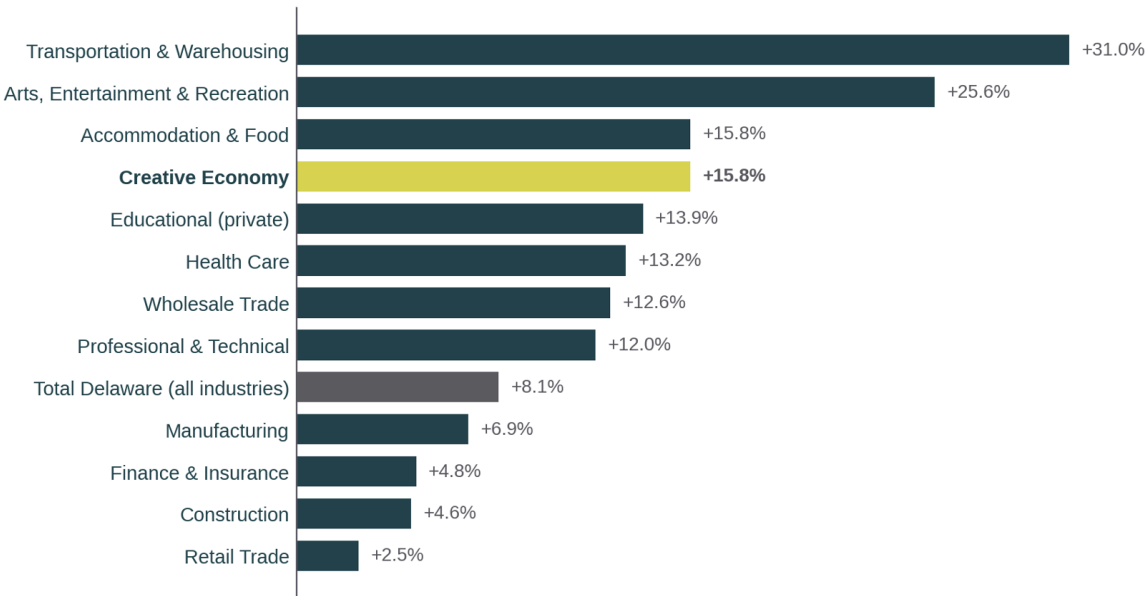
Source: Sound Diplomacy; BLS QCEW.

5.1.4 Comparison with the regional economy and other sectors

Even in recovery, the creative economy outpaced the wider state economy. Its 15.8% direct-employment gain between 2021 and 2024 exceeded total employment growth in Delaware (8.1%) and that of most traditional industries, including Retail Trade (2.5%), Finance and Insurance (4.8%), Construction (4.6%), Manufacturing (6.9%) and Health Care (13.2%). Only Transportation and Warehousing (31.0%), driven by logistics and

e-commerce, and Arts, Entertainment and Recreation (25.6%), which itself overlaps the creative sector, grew faster.

Figure 21. Employment Growth 2021 - 2024: Creative economy vs region industries



Employment growth 2021-2024, QCEW private employment, Delaware. Creative Economy highlighted; total economy in grey. Source: BLS QCEW, private employment, State of Delaware, annual averages; Creative Economy is the Sound Diplomacy estimate.

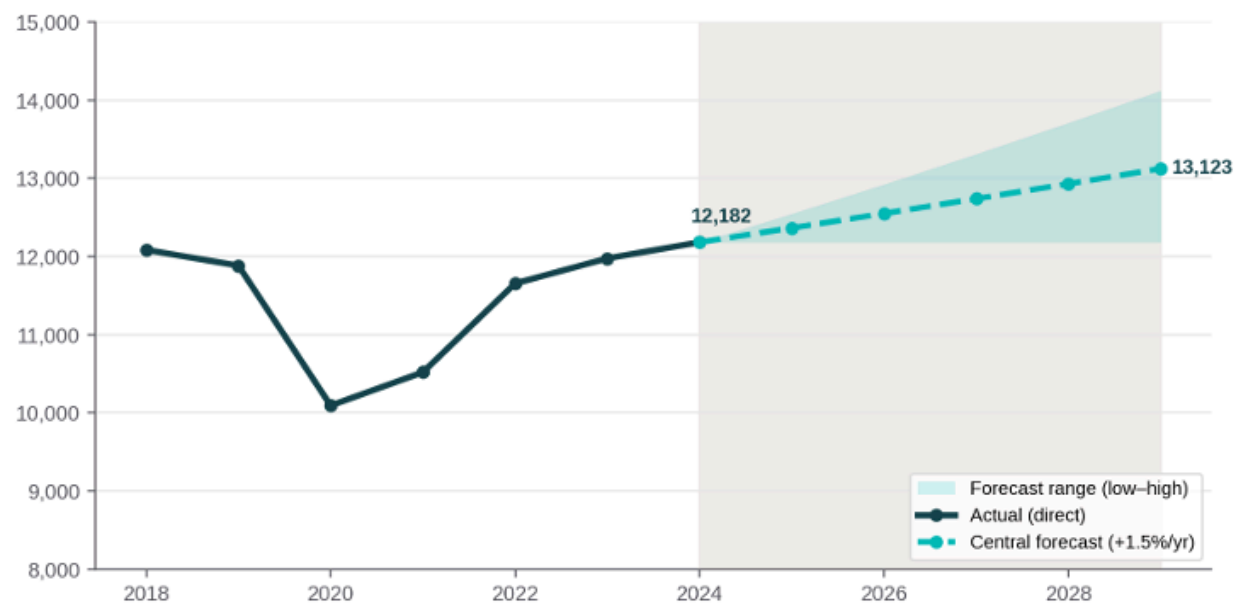
Beyond its growth, the creative economy is a modest but rising share of the state's employment. It accounted for about 2.6% of total employment in Delaware in 2024, up from 2.4% in 2021. That is comparable to Wholesale Trade and larger than Arts, Entertainment and Recreation, while remaining far smaller than Health Care, Retail Trade, Finance and Insurance, or Accommodation and Food Services.

5.2 Five-year outlook (2025-2029)

Because most of the recent growth reflects the sector recovering from the pandemic rather than genuinely new expansion, the forecast does not assume that fast pace continues. Starting from the 2024 level, it considers three paths for the next five years. In the middle (most likely) case, direct employment reaches about 13,100 jobs by 2029, which corresponds to a total effect of roughly 21,000 jobs once indirect and induced

employment are added. Depending on how the wider economy performs, the figure could land anywhere between about 12,200 and 14,100 direct jobs (about 19,500 to 22,600 in total). Because any five-year forecast carries real uncertainty, the report gives this range rather than a single number.

Figure 22. Direct employment: history 2018–2024 and forecast 2025–2029



Source: history evolved from the 2021 baseline with BLS QCEW; forecast is Sound Diplomacy scenarios (2024 base, central +1.5%/yr).

Table 11. Direct employment forecast from 2024; total effect

Scenario (2025–2029)	Annual rate	Direct 2029	Estimated total 2029	Δ direct
Low (through-cycle)	0.0%	12,182	≈ 19,500	0%
Central (normalized)	+1.5%	13,123	≈ 21,000	+7.7%
High (sustained)	+3.0%	14,122	≈ 22,600	+15.9%

Applies the 2024 employment multiplier (1.60)

Appendices

Appendix 1. Asset Definitions

Below is a classification of Delaware's creative-related assets .

Sector	Subsector	Category	Description
Artistic creation & performance	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
	Performing arts creation	Performing arts companies (theater, 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
Audiovisual & interactive media	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 theaters	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
Books & press	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, catalogues, 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
Cultural & natural heritage	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
Cultural education	Cultural education	Organizations that provide traineeships 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
Design & creative services	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
Music recording & publishing	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
Performing arts: live music, theater, dance, circus	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
Visual arts & crafts	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
Industry support - retail	Recording & publishing stores	Record stores	Retail outlet that sells recorded music
	Instruments and equipments	Instrument manufacturers	Establishments specialized in the manufacture of music instrument
		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
Other professional & business support	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
Tourism	Accommodation	Hotels and hostels	Accommodation establishments, such as hotels & hostels, including bed and breakfasts

Appendix 2. Instructions to use the creative ecosystem interactive asset map

All categories are included and mapped on this interactive map tool developed specifically for the Delaware area.

This tool allows users to see a heat map of assets, by county and County Subdivision (City) within the region. Users can zoom into the map and click on individual assets to see more information about each one. Each asset is color-coded according to the sector it belongs to.

To see the assets in the map, go to the menu 'Widgets' in the interactive map, top right of your screen. The assets can be filtered by sector, subsector and category, by clicking on each categorization. To filter items that do not appear on that menu (grouped as "other"), click on "search in...." and then type the name you want to filter from the list of categories in Appendix 1. It is also possible to filter several categories simultaneously.

The interactive map contains four types of asset count maps, each of which can be activated clicking on the layers button on the bottom right and then clicking the eye icon:

- **Cluster Map:** This is a visual aid that shows the clusters or groups of assets across the map. The darker the color, the higher number of assets (lighter – darker).
- **Assets per sector:** This shows the assets' concentration throughout the whole region, split by type of sector (each with a different color).
- **Assets heat map by county:** This shows the concentration of mapped assets across all Counties in Delaware. The darker the green, the higher the concentration of assets within that County.
- **Assets heat map by County Subdivision (City):** This shows the concentration of mapped assets across all cities/towns in Delaware. The darker the green, the higher the concentration of assets within that city/town.

Appendix 3. Economic Definitions and Key Concepts

This update evolves direct employment from the 2023 Economic Impact Analysis and recomputes output, gross value added and the full economic impact for 2024 using the BEA RIMS II 2024 multipliers for Delaware, while reusing the national value-added coefficient of the 2023 study. The 2021 figures are those of the 2023 study.

- Direct employment: jobs generated directly by the creative industries themselves. This figure is updated in this report.
- Indirect effect: the output, value added and jobs generated along the creative industries' supply chain, that is, by the local businesses that provide them with goods and services.
- Induced effect: the output, value added and jobs supported by the spending of wages earned, directly and indirectly, in the creative economy.
- Total effect: direct plus indirect plus induced. This report presents the total effect and its indirect and induced components, for employment, output and value added, in both 2021 and 2024.
- Output: the total value of goods and services produced, by the creative industries directly and, in the total effect, across the rest of the Delaware economy.
- Gross value added (GVA): output minus the cost of the intermediate goods and services used to produce it; the sector's contribution to GDP.
- Employment multiplier: the ratio of total to direct employment. It is 1.76 in 2021 ($18,551 \text{ total} \div 10,520 \text{ direct}$) and 1.60 in 2024 ($19,503 \div 12,182$). This update applies the RIMS II multipliers for each year rather than holding the 2021 multiplier, which is why the total effect grows more slowly than direct employment.
- Output multiplier: the ratio of total to direct output, 1.60 in 2021 and 1.59 in 2024. It means that every \$1 of creative output generates about \$0.59 of additional output elsewhere in Delaware.

- RIMS II (Regional Input-Output Modeling System, BEA): the regional multipliers for Delaware used to estimate output, value added and the indirect and induced effects. This update uses the 2024 edition (2017 national benchmark with 2024 regional data); the 2021 figures use the edition embedded in the 2023 study.
- Value-added coefficient: the ratio of value added to output, taken from the BEA national Use table and reused from the 2023 study, used to convert direct output into direct value added.
- Mapping-adjusted baseline: the 2021 employment figures from the 2023 study, which correct the classification of the official sources through Sound Diplomacy's establishment mapping. This report evolves that baseline rather than rebuilding it.
- QCEW (Quarterly Census of Employment and Wages, BLS): the official source of the employment trend used to update the baseline.
- OEWS (Occupational Employment and Wage Statistics, BLS): occupational lens used to count creative occupations across all industries.
- NAICS: the industry classification used to define the creative economy; the 2017 codes of the 2023 study are reconciled with the 2022 revision.