



Creative Economies and Economic Recovery

Case Studies of Arts-Led Recovery and Resilience

 Creative Vitality
SUITE

WESTAF

National Assembly of
State Arts Agencies
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Introduction

As many look expectantly toward a post-COVID-19-pandemic environment in the United States, our state and regional economies struggle to recover from a pandemic-induced recession. Some areas are facing this endeavor while still trying to recalibrate from lingering effects of the Great Recession that occurred more than a decade ago. As we enter 2021, even areas that managed to rebound from prior economic crises are facing record-breaking unemployment, business closures, income losses and looming questions about how to reconstruct societal cohesion. Rebuilding and renewing an economy that will provide opportunity and prosperity for all is a colossal challenge, one that will require policymakers and community leaders to leave no stone unturned in their search for viable solutions.

To that end, **the arts and creative industries offer a powerful source of light for states and localities aiming to reignite economic growth.** In addition to their ability to provide hope, solace and even joy during dark times, the arts can rekindle economic recovery after hardship strikes a state or community. Creative organizations and enterprises provide jobs and produce revenues themselves. But they also help other sectors to blossom by stimulating economic activity in multiple sectors, attracting tourism and creating a climate conducive to business development.

History offers us many useful lessons hidden within past periods of crisis. In this spirit, the following collection of case studies shows how the creative economies of many regions achieved growth in the aftermath of the Great Recession of 2008-2009 and how these sectors exhibit continued resilience in the face of daunting circumstances. These stories highlight the strong synergies between cultural development and community-led economic development and how creativity contributes to the success of rural regions, metropolitan centers and communities with histories of persistent economic disenfranchisement and distress. These case studies also reveal the roles that artists, community members, elected officials, public administrators, community foundations, economic development professionals and others can play in developing thriving communities and robust economies.

Eleven states and communities are highlighted in these case studies: Arizona, Arkansas, Georgia, Maryland, Massachusetts, Minnesota, Nebraska, Tennessee, Vermont, Washington and West Virginia. Each study examines the resilient regions and creative industries, dynamic organizations, well-established and innovative initiatives and programs, and a number of creative economy-supportive public policies. These textured stories present hard data and facts that point to growing industries and job markets, and high concentrations of creative activity in states and regions that are not always identified as creative centers. In Arizona, the Arizona Creative Communities Institute is explored alongside the development of the creative

economy in selected communities. The place of arts and culture within the regional development aspirations of Northwest Arkansas and the arts-led economic development of Western Massachusetts are examined, as is a suburban creative district in Prince George's County, Maryland, and cultural tourism in Appalachian Tennessee. Recent legislation that creates the pathway to a statewide creative districts program in Nebraska also is detailed. West Virginia's music sector is profiled along with the meteoric rise of Georgia's film industry. The creative economy strategies that leverage the rich historical, scenic and cultural assets of rural regions in Southern Minnesota and Northeast Kingdom, Vermont also are presented.

Taken together, these case studies offer important insights:

- **Creative economy development strengthens overall economic development.** A focus on the creative economy has a place within comprehensive regional economic development strategies, both as an industry sector in its own right and as a catalyst influencing other sectors. Regions, industries and jobs growth—units of analysis often used in the economic development sphere—are equally applicable to creative activities.
- **Those who work in arts and cultural spaces deeply understand economic and community development imperatives and the potential of their work to grow their communities.** The case studies that follow show arts leaders as active co-architects of destination tourism, community revitalization, talent attraction, economic diversification, livability and regional economic development strategy broadly.
- **Rural and heartland communities thrive through the arts and culture.** Metropolitan and coastal areas are not the only reservoirs of creative talent. Communities of any size have homegrown cultural assets that can be mobilized for economic good.
- **Each community has a creative ecosystem that offers unique economic opportunities.** These case studies show that beneficial economic activity comes from arts subsectors as varied as film, music, the visual arts, artisan manufacturing and more. Strategies that center on the distinctive history, people, cultures and attributes of local communities can yield civic benefits as well as economic advantages.
- **Many regional creative economies have been incredibly resilient in the face of past economic turbulence.** This suggests that communities that make the arts and culture part of their economic fundamentals may be better equipped to survive current and future economic crises.

- **Success often comes through a combination of public and private efforts.** The communities profiled through this research are realizing positive economic outcomes through a varied mixture of public policies and government programs—often originating from state arts agencies—combined with leadership from businesses, philanthropists, individual artists and nonprofit cultural organizations. Public and private partnership endeavors can yield transformative results.

Methods

This set of case studies, developed by the Creative Vitality Suite team at the Western States Arts Federation (WESTAF) in cooperation with the National Assembly of State Arts Agencies (NASAA), incorporates three elements:

1. **Creative Vitality Suite data analysis:** The [Creative Vitality™ Suite](#) was designed and developed by WESTAF, a regional nonprofit arts service organization, experienced research organization and developer of technology solutions for the arts. The tool incorporates a range of quantitative data sets related to creative industries, creative occupations, demographics, and arts and cultural nonprofit activities. The analysis conducted for this project focused primarily on using the [Creative Vitality Index](#) (discussed in more detail below) to understand a region's creative vitality by way of comparison with other regions, regional creative industries earning trends from 2011-2018 and regional creative occupation growth rate trends from 2011-2018. In a few cases, the top performing industries in terms of industry earnings in a given region also were identified. These three to four data points provide a framework with which to understand the strengths and weaknesses of a region's creative economy.
2. **Interviews with regional experts and opinion formers:** The project team conducted 12 interviews with regional experts and opinion leaders who are quoted in the case studies. Interviewees included state arts agency and state film office staff, a regional foundation executive, a local community development leader, a regional arts service organization executive, a state senator, nonprofit arts organization staff and others. Interviewees were asked to comment on the evolving economic context in their regions or states since the Great Recession and their perspectives on the resilience of the creative economy and its contributions to the larger economy. They also were asked to comment on key initiatives, strategies, plans and programs to advance the creative economy.
3. **Secondary research:** Roughly 100 additional sources, including journal articles, newspaper articles, government agency reports, consultancy reports and other materials, were consulted to provide more detail on specific creative economy-supportive programs, initiatives, strategies and plans of states and regions and on the general economic conditions within states and regions.

Sources of Data

The primary sources of economic information used in this study are data sets held within the Creative Vitality Suite (CVSuite), including industry data (federal North American Industrial Classification codes), occupation data (Standard Occupational Classification codes) and nonprofit data (National Taxonomy of Exempt Entities codes). Industry and occupation data are integrated from Economic Modeling Specialists International based on information supplied from the U.S. Census Department and the U.S. Bureau of Labor Statistics. Nonprofit data is sourced from the Urban Institute's National Center for Charitable Statistics.

Industries offered in the CVSuite were selected based on their relevance to the creative economy and the economic contributions that these industries offer to the creative economy. Input from CVSuite clients played an important role when selecting the industries for inclusion in the CVSuite. The occupations offered in the CVSuite were selected based on two criteria: (i) occupations that are highly correlated with measured skill sets in thinking creatively, originality and fine arts knowledge as measured by the O*NET occupational network database of the U.S. Department of Labor's Employment and Training Administration and (ii) input from CVSuite clients. The CVSuite includes primary and specialty industry and occupation codes. Primary CVSuite creative industries and occupations were chosen for review in this study primarily, but in some cases, a subset of industries and occupations was chosen to examine particular industries like film and media, music, or independent artists, writers and musicians. The primary creative industries and occupations include 81 industry codes and 74 occupation codes.

The CVSuite also includes data on creative industry earnings. These data reflect the total labor compensation earned by creative workers including wages, supplements to salaries (such as employer contributions to employee insurance or pension funds) and proprietor earnings for owner-operated creative businesses. In addition to providing a perspective on the livelihoods of creative workers, earnings data also offer a useful perspective on funds with a high probability of rippling through local economies as workers pay for necessities such as housing, transportation, food and other essential services.¹

Creative Vitality Index

The Creative Vitality Index uses the data points described above to compare the per capita concentration of creative activity in two regions. Data on creative industries, occupations and cultural nonprofit revenues are indexed using a population based calculation. The resulting CVI Value shows a region's creative vitality compared to another region. The Creative Vitality Index (CVI) is a proprietary index developed by the CVSuite.

Other Data Sources

In addition to CVSuite data, the project team also referred to a range of secondary data sources that provide data analyses related to the states and regions considered in these case studies. For example, the National Assembly of State Arts Agencies [Creative Economy State Profiles](#), which present data of the Arts and Cultural Production Satellite Account (developed in partnership with the U.S. Bureau of Economic Analysis and the National Endowment for the Arts), are referred to in a number of case studies. In some case studies, analyses produced by localities, states or regional planning organizations also served as sources of data.

Region of Analysis

Case studies were selected based on consultation between NASAA and WESTAF with a view to having regional distribution, a breadth of various approaches to supporting the creative economy, and inclusion of rural, urban and suburban regions. Depending on the subject of each case study and the state and/or region it considers, CVSuite data analysis has been designed based on state, metropolitan statistical area, county or ZIP code boundaries.

Creative Community Building in Arizona

Connecting communities to develop the state's creative economy

The Great Recession acutely depressed the Arizona economy as a whole, according to data from the U.S. Census.² Prior to the pandemic of 2020, Arizona was well into its recovery from contractions in employment, decreased homeownership and other challenges. However, the signs of a pandemic-induced recession now point to a worrying recurrence of economic hardships. Arizona's economic outlook during the pandemic mirrors the severe challenges the state experienced during the Great Recession in many ways. Research by the [Economic and Business Research Center at The University of Arizona](#) points out that quarterly employment dropped by 11.4% peak to trough during the Great Recession compared with 11.3% during the pandemic.³

As the state considers how best to arrest these declines and spark recovery, the arts are one economic sector that may offer a valuable strength. The [U.S. Bureau of Economic Analysis](#) (BEA) reports that arts and cultural production (a measure of the creative economy) accounts for \$9,677,016,584 and 3.0% of the Arizona economy, contributing 86,704 jobs in 2017.⁴ The sector's value added puts it ahead of key sectors like utilities and mining, agriculture, and education. BEA data also shows that per capita value added from the arts and cultural sector increased by 17% from 2009-17.⁵ However, the creative sector, like many industries in Arizona, experienced volatility during that time span.

Given the importance of the creative economy in Arizona, its continued advancement and resiliency are vital. The [Arizona Commission on the Arts](#) had the foresight to recognize that new approaches were needed to strengthen Arizona's creative economy in the last few years. It developed the [Arizona Creative Communities Institute](#) (AZ CCI) with [Arizona State University's Herberger Institute for Design and the Arts](#) and the [Southwest Folklife Alliance](#) to discover new ways to help communities—especially rural areas and smaller cities—develop their local creative economies.



Photo courtesy of Arizona Commission on the Arts

“Through Creative Communities, we focus on creative sector jobs and businesses by providing financial support for collaborative arts based experiments, alongside opportunities for individuals to learn and network across sectors, to more expansively imagine new ways of operating.”

Jaime Dempsey, Arizona Commission on the Arts

Arizona Commission on the Arts Executive Director Jaime Dempsey describes AZ CCI as a multiyear and multipartner initiative driven by a local leadership team of community members from different sectors. AZ CCI had its first convening of nine teams in 2017. Together, these teams devised strategies to advance the creative

economy and bridge multisector partnerships. The Arizona Creative Communities Institute offers its participants the opportunity and resources (technical assistance, mentoring and grant funds) they need to rethink how they approach the creative economy and engage their communities through the arts. By providing a platform for participants to connect with each other, as well as a network of local, state, and national experts from diverse sectors to exchange knowledge, AZ CCI expands the impact of information sharing, empowering more communities in their efforts to put creativity to work for positive change.

“In this ongoing recovery, we focus on individuals as centers of institutions and drivers of change, as opposed to leading place based work with facilities, structures and systems.”

Jaime Dempsey, Arizona Commission on the Arts

Tangible Results from AZ Creative Communities

The nine communities that have developed Arizona Creative Communities Institute projects are [Barrio Anita](#), [Casa Grande](#), [Douglas](#), [Eastlake](#), [Flagstaff](#), [Globe](#), South Phoenix, [Tempe](#), and [Yuma](#). Participating communities have populations ranging from 725 (Barrio Anita) to 192,364 (Tempe). Outcomes of these projects are equally wide-ranging and include participatory public art projects, a cultural rebranding of communities to attract tourism, and improved relationships between community residents and their local government agencies.

Barrio Anita

Barrio Anita is a historically Hispanic neighborhood with a population of 725. In April 2018, the Barrio Anita team hosted a two-night [community celebration](#) called “Barrio Stories/Barrio Anita.”⁶ [Borderlands Theater](#) collaborated with the Barrio Anita team, which included local residents and the director of the [Oury Recreation Center](#), on the event. With the intention of fostering community engagement and offering residents an opportunity to celebrate and reaffirm their neighborhood pride, “Barrio Stories/Barrio Anita” activities included food, music and oral histories. Participation in the event coalesced the neighborhood's cultural assets, fostered an increased sense of community responsibility among residents and improved the community's relationship with the City Council office that represents it. These are capacities necessary for community resiliency and recovery.

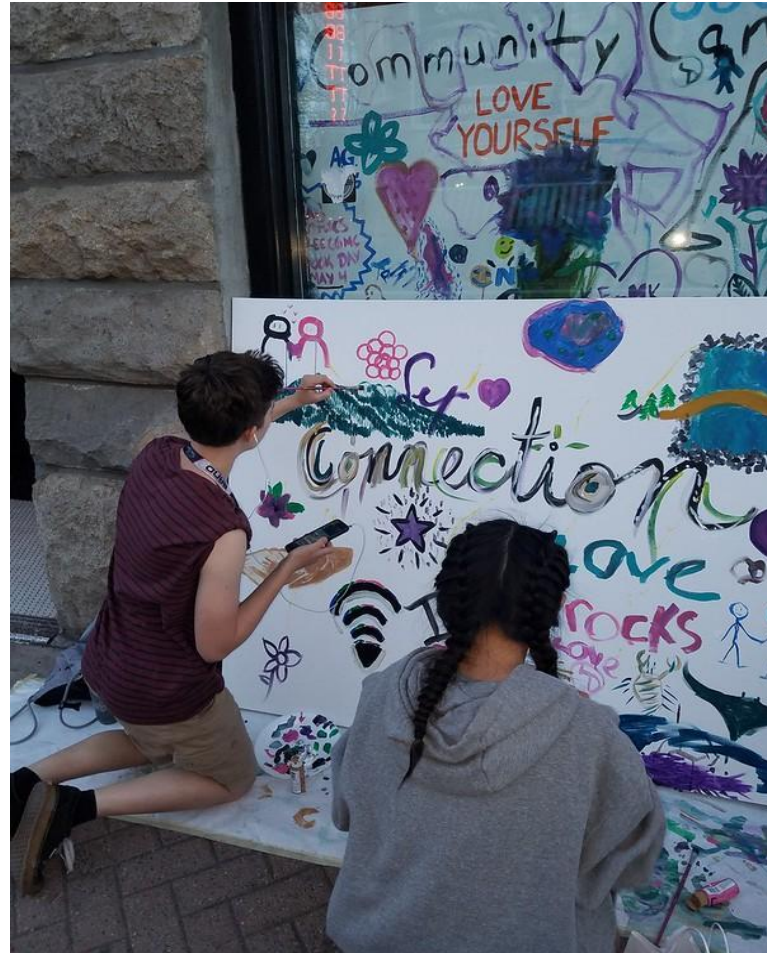


Photo courtesy of Arizona Commission on the Arts

Eastlake

Located in downtown Phoenix, the African American neighborhood of Eastlake has a population of 2,607. The concept of Eastlake's CCI project, "[Rediscovering the Soul of the City Through the Arts](#)," was to rebrand the neighborhood and draw development to the community.⁷ In the early 2000s, residents of Eastlake experienced displacement when a runway was planned for Phoenix Sky Harbor Airport, which resulted in the neighborhood's gentrification and large sections of vacant land. The Eastlake CCI team sought to revitalize the community while maintaining its African American roots. The CCI team collaborated with the [Downtown Phoenix Partnership](#) to revise the official Phoenix tourist map to better highlight Eastlake's historic, architectural and cultural assets. The revised map is now being used to raise awareness of the community and

draw visitors, and their related spending, to Eastlake. The CCI project also has resulted in public art at Eastlake's entrance, a video showcasing the contributions of African Americans in the neighborhood and a Jazz in the Park series. The team has quarterly meetings with the city manager to discuss ideas for the development of the community, which are then shared with various city departments. These meetings have resulted in a change to neighborhood zoning to allow multistory development and urban infill, and collaborations with the city on an action plan and a new housing development. The team's efforts to increase the community's visibility appear to be working, as Eastlake was featured as one of *Phoenix New Times's* "emerging cities." The Eastlake CCI project has demonstrated how the cultural, architectural and historical attributes of a community can be harnessed to revitalize the neighborhood, improving the lives of its residents and attracting future visitors by celebrating its own unique identity.



First Friday community input event for Healthy Relationships hosted by AZ Creative Communities: Team Flagstaff. Photo by Stephanie Gerst, 2019



Members of Team Yuma discuss their plans during the second AZ Creative Communities Institute general meeting. Photo by Arizona Commission on the Arts, 2018

Creative Communities Lead the Expansion of Arizona’s Resilient Creative Economy

A review of the Creative Vitality Index (CVI) data on the communities that participated in the Arizona Creative Communities Institute indicates that they are making an impact on the state and driving the creative economy. Data show that the communities participating in the AZ CCI had a CVI value of 1.85, which indicates that the concentration and impact of the creative economy were significantly stronger for these communities than they were for the nation as a whole (with a benchmark of 1). The CVI value for these communities was also higher than the CVI value of the state of Arizona. The CVI data substantiates that the communities selected to engage with the Arizona Creative Communities Institute demonstrate that the arts can be a potent economic force across different geographies and community structures.

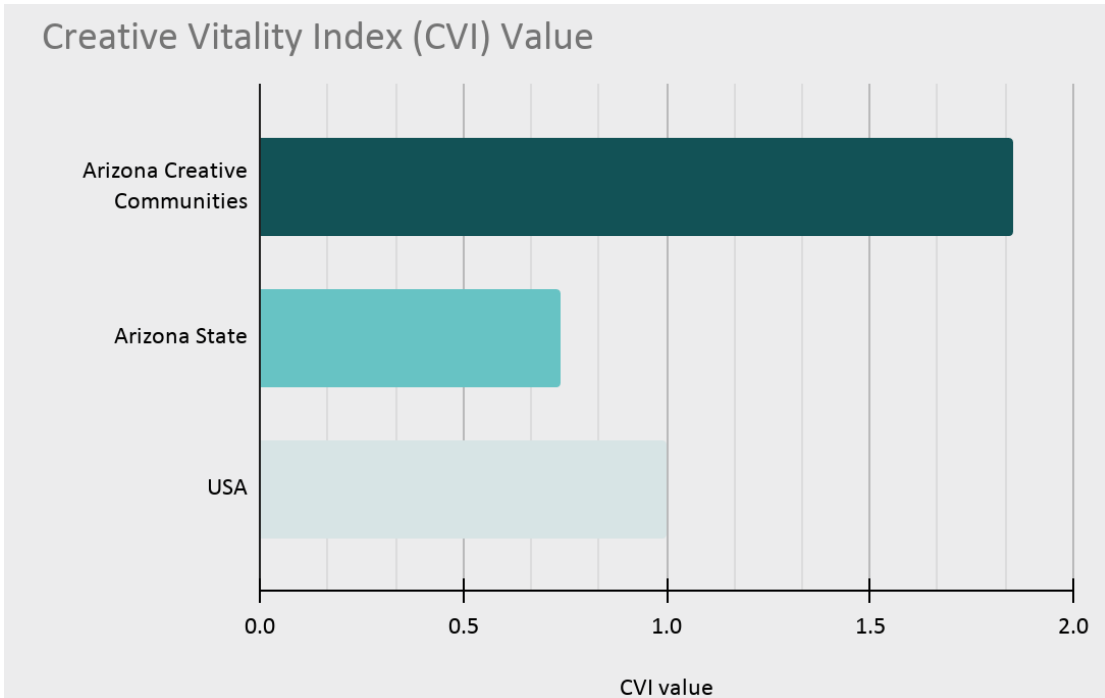


Figure 1. Creative Vitality Index Value: Arizona Creative Communities, State of Arizona, and USA comparison, CVSuite, 2020

Creative sector occupation growth was also positive between 2011 and 2018, growing by an average of 2.8% annually in Arizona Creative Communities compared to 2.6% in the state of Arizona as a whole.

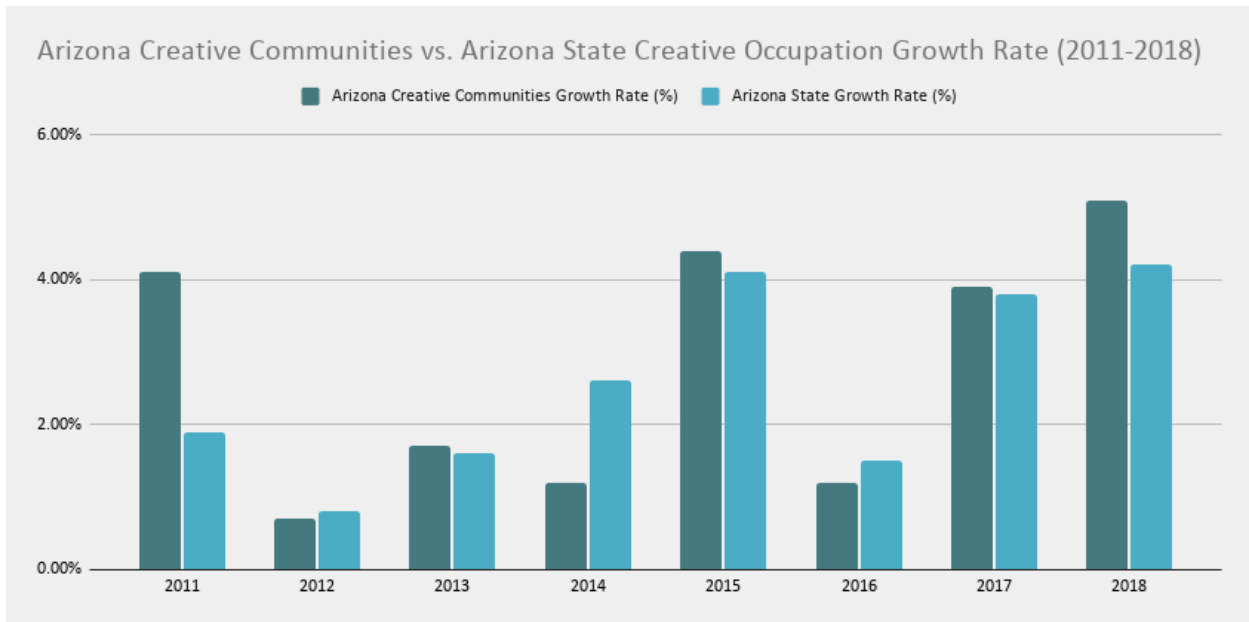


Figure 2. Arizona Creative Communities vs. State of Arizona Creative Occupation Growth Rate (%), CVSuite, 2020

“Arizona Creative Communities is a part of how we reimagined recovery. It is important to reinforce creative work on the ground, and what we learned from these communities will continue to influence our work and programs into the future.”

Jaime Dempsey, Arizona Commission for the Arts

The AZ CCI program shows how creative economy growth and creative economic and community development can go hand in hand. Cross-sector and community-led partnerships are central to these efforts to ensure that communities have ownership of their cultural life, community stories, and arts and cultural experiences in ways that support civic engagement, community pride and increased cohesion, and economic opportunity.

Northwest Arkansas: The Resilient Economy of a Creative Region

Arts-led creative economy development in Northwest Arkansas

Northwest Arkansas, a region recognized for the presence of Walmart, other corporate headquarters and the now iconic [Crystal Bridges Museum of American Art](#), is an exceptionally resilient region recognized for its long arc of economic growth and impressive recovery from the Great Recession. *Forbes* ranked Northwest Arkansas as the #2 region in the United States for recession recovery in 2009.⁸ Even amidst the pandemic recession of 2020, Northwest Arkansas's economy remains dynamic, with the continued growth of many of its major companies, a growing population, and bolder aspirations to expand its economy by attracting creative talent.

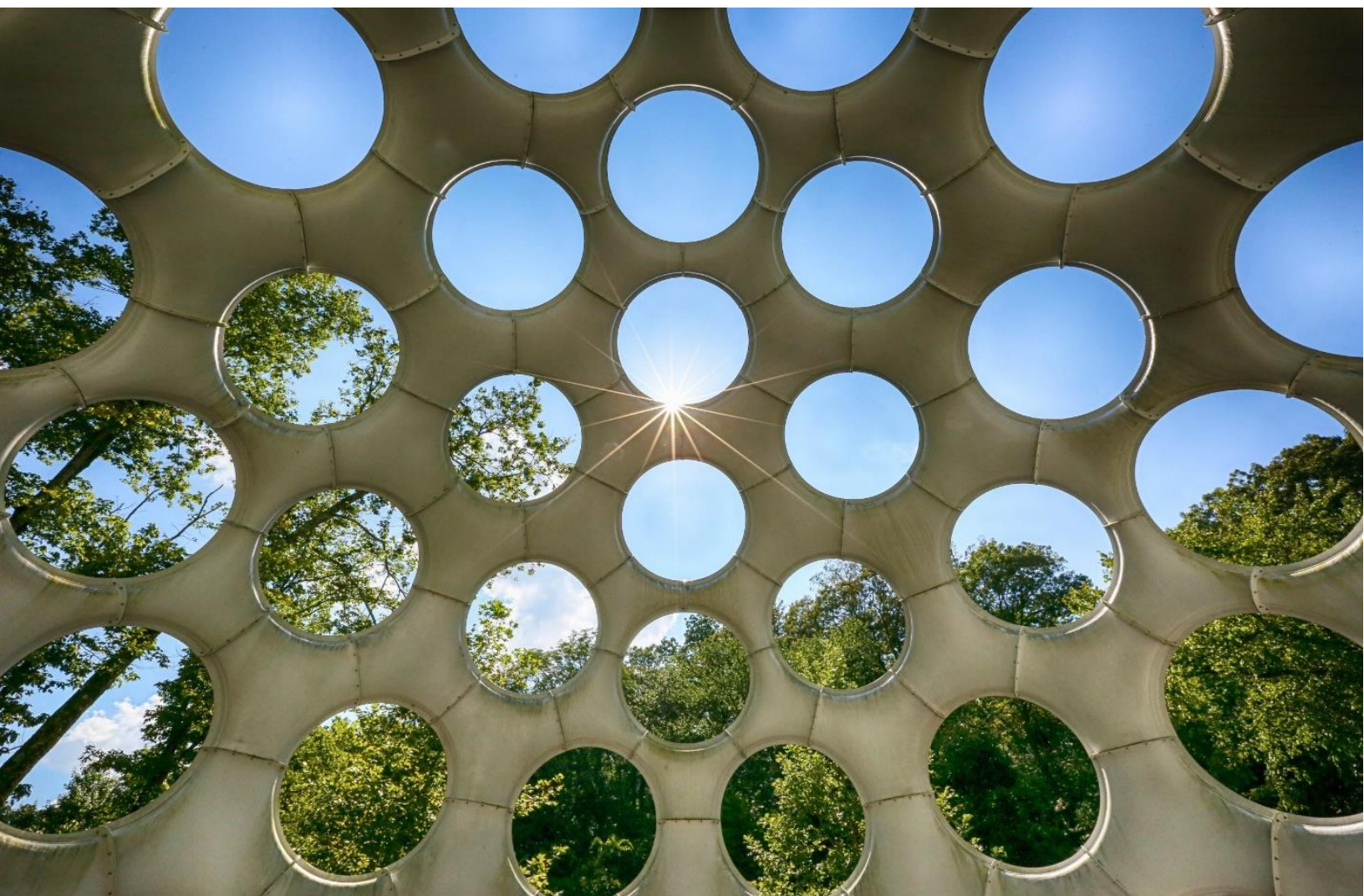
The [Northwest Arkansas Regional Arts Service Organization](#) (RASO) was launched in 2019, ahead of the unforeseeable pandemic crisis, with an aim of developing the capacity of the arts as an economic sector across the region. Working in collaboration with arts, business, civic and philanthropic organizations that drive the region's economic development, the budding organization has been working within the context of a highly robust economic development agenda. Talent is one of the buzzwords that leads these conversations in Northwest Arkansas, and is particularly important in discussions of the creative economy that are balancing support for local talent and the attraction of world-class talent from larger markets.

Research on the impact of Crystal Bridges on the Bentonville economy demonstrates that it had a significant positive impact on the city spatially, commercially, economically and aspirationally, giving the city an identity and reputation nationally and internationally.⁹ The museum is also consistently cited as a key feature of the livability of the entire Northwest Arkansas (NWA) region, and resident attendance grew by nearly 30 percentage points from 2012-2018, making it the most visited arts and cultural attraction in the region.¹⁰ As Allyson Esposito, executive director of the RASO, suggests, Crystal Bridges plays a critical role in the region's creative economy.

“What really put this region on the map was the opening of Crystal Bridges, which was only 10 years ago. The Museum opened amidst that recession, and plays several roles in the creative economy ... being a talent attractor with a workforce of over

400; providing free access every day, which has made it incredibly accessible to Arkansans; and attracting cultural tourism.”

Allyson Esposito, Northwest Arkansas Regional Arts Service Organization



Crystal Bridges Museum of American Art, Museum Way, Bentonville, Arkansas. Photo by Mick Haupt, Unsplash

Northwest Arkansas’s Creative Vitality

What began with Crystal Bridges establishing itself as a world-class art institution and bringing creative talent to the region has now gained breadth and momentum across the area’s arts and cultural landscape. In turn, the arts and culture are coalescing as an important and visible sector in the region. As in other regions with strong creative

economies, particularly outside of major urban areas, NWA's creative economy is supported by major employers, academic institutions, and a rich and growing number of artists and arts organizations. Based on preliminary research undertaken by the RASO, Esposito has identified roughly 700 working artists and more than 250 arts and cultural organizations in the region. The music industry has been identified as a particular asset for the NWA creative economy, and a music strategy, still a rarity even in much larger urban markets, has been developed to set a roadmap to grow music as an economic sector. As Esposito suggests, this unique metropolitan statistical area (MSA) shares many parallels with much larger markets but also possesses a unique culture that prides itself on frugality and lean budgets, while pursuing grand aspirations. A geographically dispersed region nestled in the Ozarks and set apart from the major urban centers of Arkansas, itself a highly rural state, would not necessarily be considered a competitor with larger cities in business climate and cultural amenities. But, as Esposito points out, the region has many of the assets of larger metropolitan areas.

“If you think of the communities that make up Northwest Arkansas as an MSA, the region has all the functional features of a major city. Walmart is *expanding* during this time and there are other major companies here. The creative assets are certainly here—a flagship museum and university and a highly innovative community college doing programs around technology and art are just some of those.”

Allyson Esposito, Northwest Arkansas RASO

Arts and cultural amenities in the area have contributed to the development of towns and cities in the region, supported revitalization through the growth of downtown businesses such as restaurants and other purveyors, directly employed residents, and supported the economic development plans of communities in the region.

Growth of Northwest Arkansas's Creative Sector

Creative Vitality Suite data analysis shows that NWA's creative economy grew significantly from 2011-2018. Creative sector earnings (worker wages that ripple through the local economy) grew by 13% from 2011-2018.

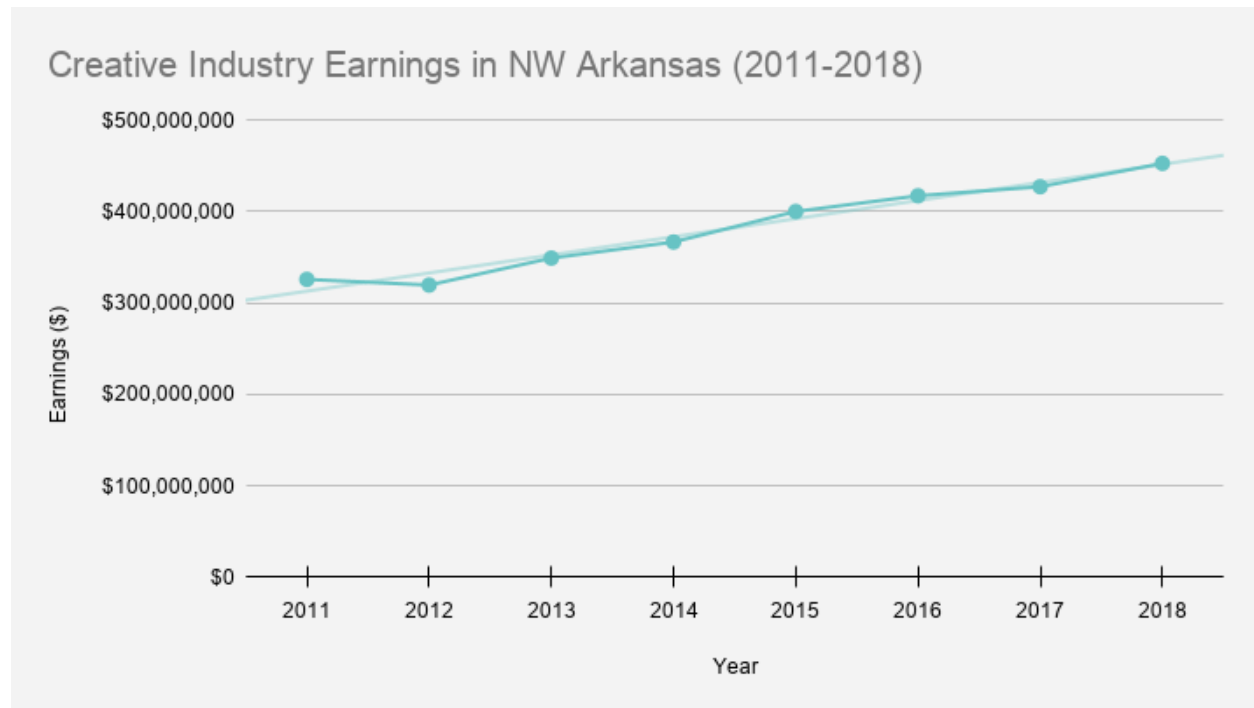


Figure 3. Creative industry earnings in Northwest Arkansas, 2011-2018, CVSuite, 2020

Creative job growth has maintained a positive trend over the same period, with an average annual growth rate of 3.6% from 2011-2018. Like the larger NWA economy, the creative economy, as a subset, has maintained consistent growth. Even though the pandemic and associated downturn have been and will continue to be disruptive, particularly for individual creative workers and smaller organizations, the genesis of the RASO means that there are regional efforts in place that can provide a strong foundation from which to work to mitigate the challenges.

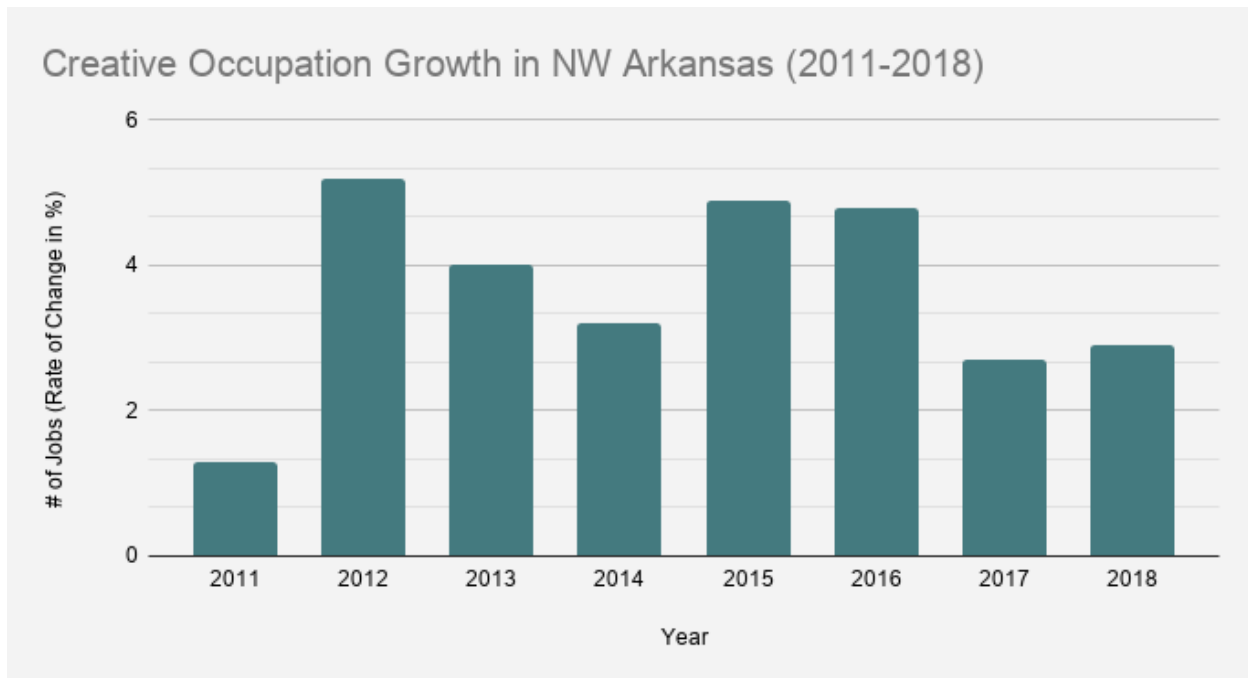


Figure 4. Creative occupation growth rate in Northwest Arkansas, 2011-2018, CVSuite, 2020

Recently opened institutions like [NWA Ballet Theatre](#) and the [Momentary](#), a contemporary art satellite of Crystal Bridges, are broadening the programming opportunities for local communities and tourists even during the pandemic. Esposito expresses concern about the challenges facing artists in the midst of pandemic related business interruptions, which include reduced event related revenues and income from tourism. She emphasizes, “it is important to focus on creative workers and individuals. I firmly believe in, and we approach the work in terms of, a widely distributed investment in small businesses and humans.” Esposito notes, however, that the economic well-being, entrepreneurial and recovery capacities of artists, arts organizations and all other businesses are intertwined.

“The region's creative economy, beyond Crystal Bridges, is poised to help engineer economic resurgence after the pandemic and is now a visible and concentrated focus for the region’s economic development aspirations.”

Allyson Esposito, Northwest Arkansas RASO

Numerous creative initiatives recently initiated in the region include everything from the creation of new facilities through the creative adaptation of decommissioned spaces to cultural plans with local governments across the region to an online

regional artist talent showcase. An ambitious music strategy was launched early during the pandemic of 2020, based on strategy from the Northwest Arkansas Council and [Sound Diplomacy](#). Noting that the music industry generated a total economic output of \$389 million for the region's economy in 2016, the [Northwest Arkansas Music Ecosystem Strategy and Action Plan](#) lays out a coordinated and intentional blueprint for attracting music businesses, music related technology and multimedia investment to the region. It recommends leadership mechanisms, policy vehicles and promotional strategies to attain those goals.¹¹



Jody Kuehner's "DITCH," one of the artworks included in "State of the Art 2020" at The Momentary, Bentonville, Arkansas. Photo by Derick McKinney, Unsplash

In many ways, this is just the beginning of a much grander set of ambitions for the region. [The Walton Family Foundation](#) and [Heartland Forward](#), an institute for economic renewal, recently released the [Northwest Arkansas Economic Recovery](#)

[Strategy](#) that establishes a clear direction for efforts to stabilize and drive the creative economy as an essential component of overall economic renewal for the region. The arts and culture are central to the regional aspirations, as the Heartland Forward strategy states: “NWA is in a good place for the post-COVID-19 environment, but the region cannot afford to be complacent.... Specifically, the region should leverage its knowledge and university base; arts and culture offerings; outdoor recreation, biking infrastructure and quality of place; and a national airport, among other things to build an even more vibrant, inclusive, healthier, and more resilient economy for the future.”¹² The report places arts and cultural development as the #2 (out of 7) priority development strategies, stating that:

“NWA must double down on its already significant investments in arts and culture, which are essential for attracting and retaining talent and building the future economy.”

Heartland Forward

By making the arts and culture a cornerstone of regional development, Northwest Arkansas not only is becoming “the Heartland’s Best Small Place for Arts, Culture and Recreation,” it also has built its readiness to rebound from economic adversity.

Georgia's Film Industry and Its Creative Future

A robust film and television industry sparks growth and job creation for Georgians

Though the pandemic-induced recession initially caused an alarm that Georgia's success as one of the most significant creative hubs may be imperiled, the state's creative economy has attained significant growth in recent years, and key sectors like the film industry achieved growth even during the Great Recession. As the economy recovers, these strong fundamentals may enable the state's creative sector to regain its footing in recovery and allow it to continue to contribute to the state's wider economic success.

[National Endowment for the Arts](#) and [Brookings Institution](#) studies have noted the robust creative economy of the state of Georgia and its outperformance of other states nationally.¹³ Georgia's creative economy grew by an annual average of 7.6% between 2015 and 2017.¹⁴ Arts-led economic development and revitalization is part of the story of the creative economy's impact in Georgia, from communities like Thomasville and Sandy Springs to Macon.¹⁵ According to the Arts and Cultural Production Satellite Account (ACPSA), the creative economy generated value added of \$24.4 billion to Georgia's economy in 2017, including \$2.5 billion for motion pictures and \$7 billion for broadcasting.¹⁶ Numerous creative assets have helped integral industries such as film and broadcasting to continue growing during economic downturns.

Georgia is home to a thriving entertainment industry with national and international recognition of its music and film capacities. Through tax incentives, the presence of acclaimed studios, marketing of its film assets, and dissemination into global film production markets, Georgia's film industry has achieved significant and consistent growth over more than a decade. During the Great Recession in 2008, the state of Georgia introduced production incentives aimed at making the Georgia film industry more competitive. Georgia has had a more than 40-year history of film production support, and the 2008 tax credit provisions expanded the 2005 tax incentive package, which included a 9% transferable base tax credit with an additional 3% for hiring Georgia residents, to a 20% transferable base tax credit and an additional 10% for the inclusion of a promotional logo recognizing state of Georgia support.¹⁷ The film industry in Georgia attained further prominence following the 2008 tax credit expansion.

From 2007-20-01, Atlanta, Georgia, ranked as the seventh largest film market in the United States,¹⁸ and in 2014, then-Gov. Nathan Deal touted Georgia as the third largest filmmaking state in the country, behind California and New York.¹⁹ Senior

elected officials during this period identified film as one of Georgia's leading industries, alongside construction and agriculture.²⁰ In 2017, Georgia was ranked as the leading filming location in the world by Film L.A., and then-Governor Deal announced that the film and television industry contributed \$9.5 billion to the state's economy that year.²¹ As [Lee Thomas](#), deputy commissioner of the [Georgia Film, Music & Digital Entertainment Office](#) suggests, the film industry has been a catalyst for the state.

“The film industry has become a magnet for attracting hundreds of new support service companies, as well as help bring other business opportunities and stimulate other parts of the economy.”

Lee Thomas, Georgia Film, Music & Digital Entertainment Office

Industry research has shown that the tax incentives have supported related industries like gaming, animation and commercial production. Film activities catalyze construction, building material supplies, real estate, personal services (hair, makeup, tailors and dry cleaners), recycling and food service/catering businesses as well.



Photo courtesy of Georgia Film, Music & Digital Entertainment Office

Academic research shows that employment in the motion picture industry continued to grow through the Great Recession in Georgia,²² and an [Andrew Young School Fiscal Research Center](#) policy brief presents [U.S. Bureau of Labor Statistics](#) data showing a roughly 20-percentage-point spike in film industry employment growth in 2009, and continued growth through 2014.²³ By contrast, the state’s overall employment rate dropped by 5.4% during this period.²⁴ As Thomas recalls, the expansion of the tax credit in 2008 spurred employment opportunities in the film industry that provided a safe haven for some individuals who had been displaced.

“The recession began right after the 2008 incentive had passed, so the film industry became a catalyst for economic recovery by putting people to work and engaging the services of small businesses statewide.”

Lee Thomas, Georgia Film, Music & Digital Entertainment Office

Creative Vitality Suite data shows that the Georgia film industry grew by more than 58% from 2011-2018 and that its growth rate and trend overall outperformed the U.S. film industry as a whole during this period.

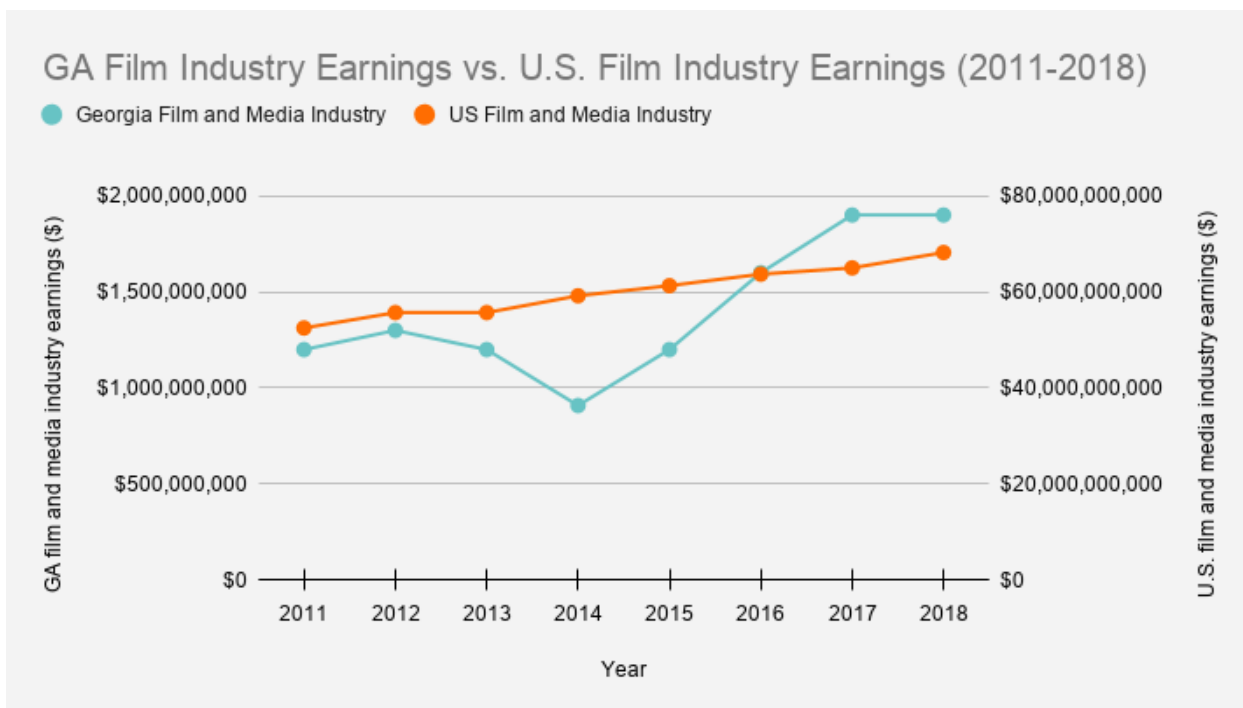


Figure 5. Georgia film industry earnings vs. U.S. film industry earnings, CVSuite, 2020

Employment in the film and media industry consistently grew between 2011 and 2018, with growth of more than 10% in 2015 and 2017. The robust growth in earnings for the industry over this period translated into increased employment opportunities as well.

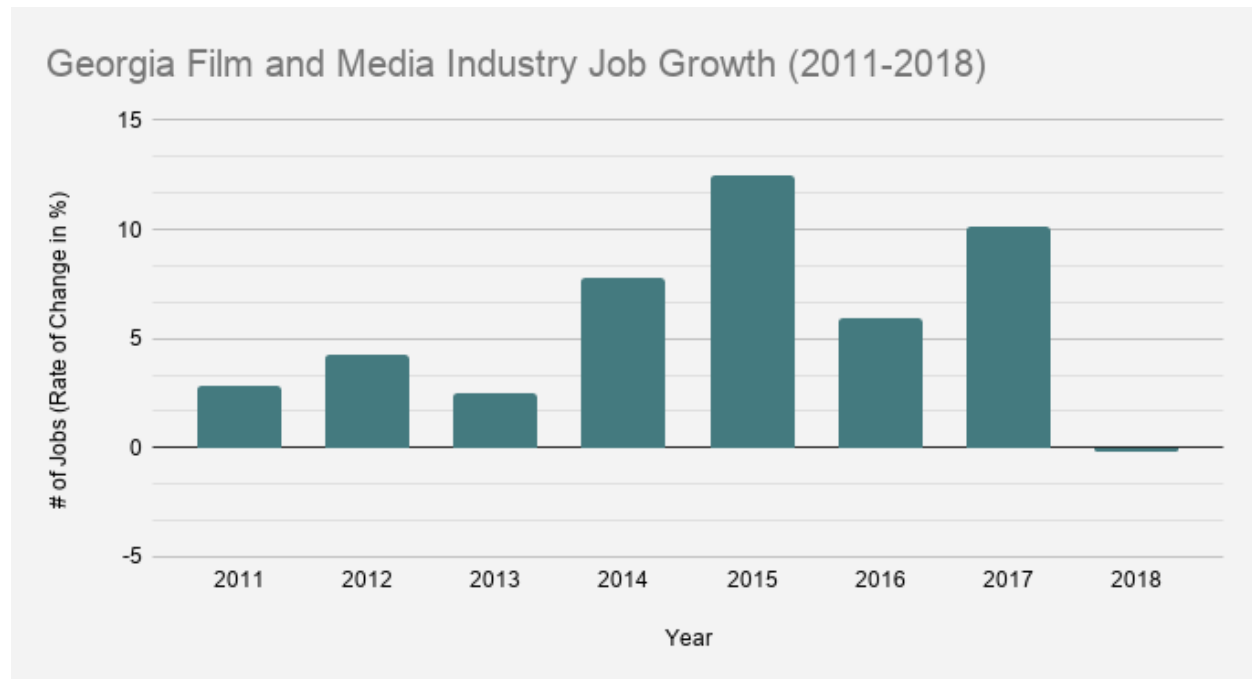


Figure 6. Georgia film and media industry job growth (2011-2018), CVSuite, 2020

There are calls to increase entry points to this important industry. Susanna Spiccia, a creative producer and the founder and former executive director of [re:imagine/ATL](#), an organization that prepares youth for careers in film and digital media, argues that barriers to entry have fallen. Spiccia said in an interview with Georgia Public Broadcasting in Atlanta that “because of the demand for more and more digital content, there is an opportunity for those with these skills sets to get in. Creativity doesn’t discriminate. We’re all born with different viewpoints and perspectives and ways of interacting with the world. You can translate that into a story and digital form in today’s world.”²⁵

Thomas stresses that opportunities are available outside of the Atlanta area and even to those that do not have technical skills in filmmaking. She states,

“Film and television productions employ a wide swath of people with different skill sets and they utilize a tremendous number of different products. Carpet and lumber providers, landscapers and

accountants, hair stylists and painters all have roles in the film industry.”

Lee Thomas, Georgia Film, Music & Digital Entertainment Office

[Ozzie Areu](#), founder and CEO of [Areu Brothers Studios](#) and former senior team member of [Tyler Perry Studios](#), cites the economic impact of the film industry on hospitality, construction, and other sectors and its potential to connect communities as reasons for launching his studio and seeking federal Opportunity Zones funding to support these interconnections.²⁶ Their desire to create jobs and engage young people with opportunities led his team to create an [Opportunity Zones initiative](#) that encompasses entertainment investments in film, television, music, gaming, stage plays, publishing and merchandise; investments in technology ventures; and real estate investments “that allow the company to support creative communities by providing shared physical infrastructure for creators and collaborators.”²⁷

Because of the rapid development of Georgia’s film and television industry, the state created the [Georgia Film Academy](#) in 2015, an organization that helps connect Georgians with jobs in the film industry. Jeff Stepkoff, the academy’s inaugural director, describes the academy as “the umbrella organization coordinating the [state’s] film and television workforce development” across its higher education systems. As Stepkoff further explains, the academy’s central focus is jobs for Georgians and building a robust industry.

“We want to get our people onto the film sets and get them working on these high-demand production jobs. In addition, we are committed to building a permanent and sustainable entertainment industry in Georgia. And we do that by supporting independent productions, local talent, our content creators and producing the work of Georgia based screenwriters.”

Jeff Stepkoff, Georgia Film Academy



Photo courtesy of Georgia Film, Music & Digital Entertainment Office

Thomas considers workforce development as the central priority for the state's economic development systems and a key area of overlap with the interests of the film industry, saying,

“Georgia is workforce oriented, and the focus for economic development is on jobs and people. The film industry does that on its own, because the whole film industry is very labor-intensive. It’s been key for us to not only talk about our competitiveness with markets on the West Coast or in New York, but also to talk about how the people down the street, the

lumber supplier or salesman, are being impacted by the industry's development."

Lee Thomas, Georgia Film, Music & Digital Entertainment Office

Even as the pandemic caused serious setbacks for the film and entertainment industry, it also presented opportunities with a skyrocketing demand for original digital content. Creatives in the media industry have been adapting their practices to keep workers safe and ramp up production.²⁸ It is anticipated that jobs in the entertainment industry will recover faster than those in other sectors, but [University of Georgia Selig Center for Economic Growth](#) research suggests that it still may take years before they fully recover from the historic lows reached during the pandemic-induced recession.²⁹ Investing in the workforce will be critical to ensuring that the film and entertainment industry is able to continue its impressive trajectory and prominence.³⁰

Nevertheless, the state still aspires to become one of the (if not the) preeminent film production markets globally³¹ and views the film industry as an important ingredient for Georgia's economic recovery. In June 2020, Georgia Gov. Brian Kemp declared film and TV production "open for business" in the state, joining with members of the [Motion Picture Association](#) to announce plans to bring back and hire an estimated 40,000 production workers to work on 75 productions and pump more than \$2 billion into the Georgia economy over the following 18 months. "The entertainment production industry is coming back and ready to jumpstart the Georgia economy by creating jobs and generating greatly needed investment and spending in communities across the Peach State," Kemp said.³²

A Creative District in Prince George's County, Maryland

The arts, film and digital media bolster a suburb's economy

With a growing and diverse population, Prince George's County, Maryland has been recognized nationally as a prominent suburban African American majority community.³³ The county is home to a thriving arts district and a number of important anchor arts and cultural organizations, and is building momentum in connecting arts and culture to conversations about the county's economic development.

During the Great Recession from 2007 to 2009, Prince George County's economy was devastated by a mortgage and housing crisis. Homeowners who had previously held mortgage loans with low interest rates were dealing with foreclosures and many of them were left without notification of their high-interest loans for years.³⁴ The statewide housing crisis put the entire state of Maryland in difficult economic standing. According to an analysis conducted by [CoreLogic](#), in Maryland's Prince George's County, the underwater mortgage rate had been as high as 37% in 2009 but had fallen to just 6.89% at the end of 2019. Still, the region remains in recovery, and three ZIP codes in Prince George's County reported negative equity rates greater than 10% at the end of last year.³⁵ The effects of COVID-19 are leading to a resurgence of economic distress in the county, with unemployment rising to 9.9% in August 2020.³⁶

As county leaders work to bolster local businesses and create more job opportunities, the creative sector may offer solutions. To propel this effort, diverse community members converged during a "State of Arts" roundtable held in 2017 by the [Prince George's County Arts and Humanities Council](#) (PGAHC).³⁷ The county economic development corporation, the local chamber of commerce and other representatives of the county government and business community joined in dialogue with artists, creative entrepreneurs and nonprofit arts groups to discuss how best to foster a long-term effort to support the arts in the county. A formal study and community planning effort subsequently commenced, led by the [Maryland-National Capital Park and Planning Commission's Prince George's County Planning Department](#), the county [Parks and Recreation Department](#) and PGAHC.³⁸ Building off of economic analysis and resident input, the project seeks to "leverage arts and culture as a game-changing urban revitalization strategy that will assist in improving the quality of life in our communities across the county."³⁹

Prince George's County's Creative Strengths

The arts and culture play an important role in both economic and community vitality in Prince George's County, contributing to its main streets, offering arts education experiences to young people, and contributing to the cultural vibrancy of the area

through festivals and events. The county's Creative Vitality Index Value slightly exceeds the nation as a whole with a value of 1.01 in comparison to a national benchmark of 1.0.

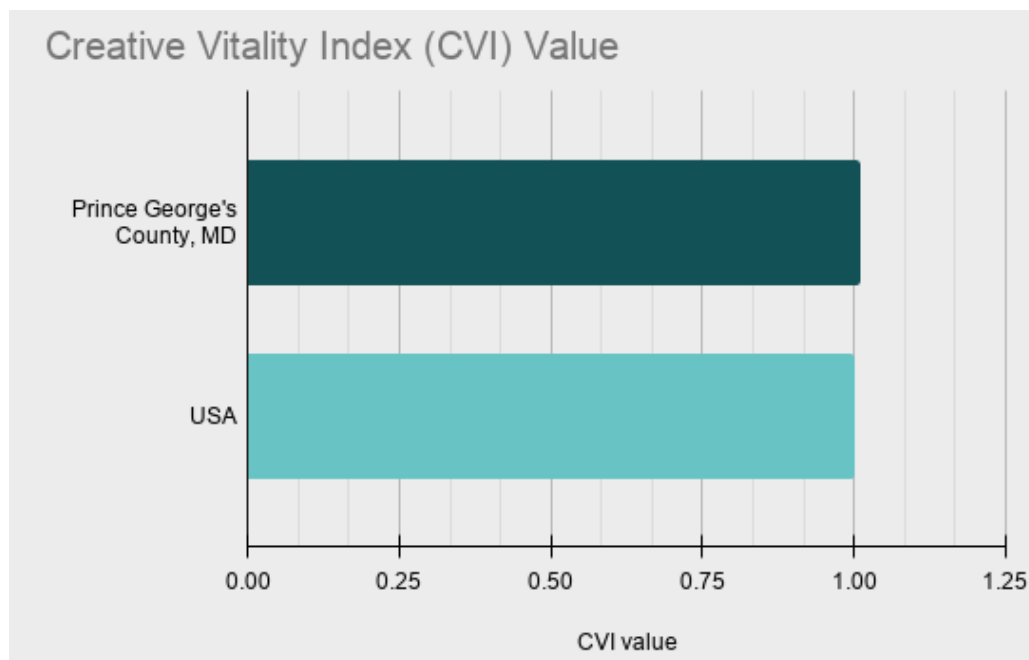


Figure 7. Creative Vitality Index Value, Prince George's County, MD, vs. USA, CVSuite, 2020

Creative jobs are the engine of the arts economy, and the county has been a strong performer in this light. It has posted growth in creative occupation rates for eight consecutive years, an increase that augments contributions to the local economy.

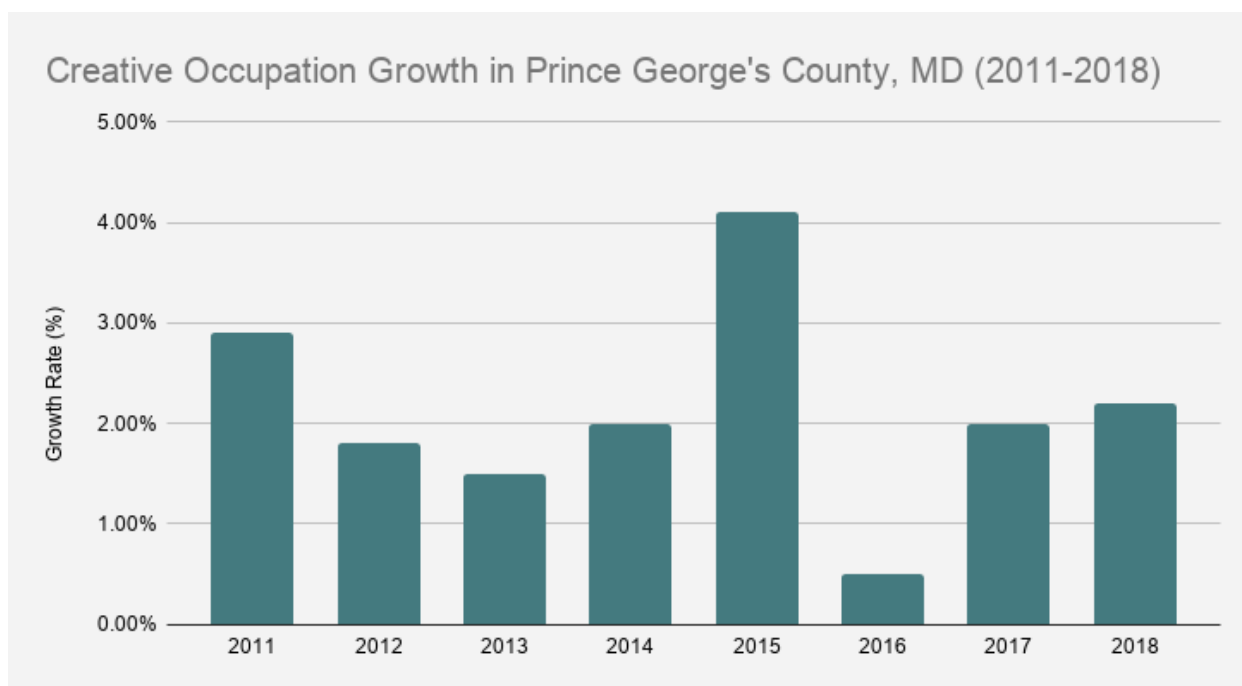


Figure 8. Prince George's County, Maryland, creative occupations growth rate, CVSuite, 2020

Gateway Arts District and Its Contribution to Prince George's County's Creative Economy

Maryland is a leading example of what arts and entertainment districts can do to support a state's economy, and the state's success has also increased the interest of other states across the country to establish their own creative districts. According to the Maryland Arts and Entertainment District Report prepared by the Towson University Regional Economic Studies Institute for the [Maryland State Arts Council](#), 26 creative districts across the state of Maryland supported an estimated 1,620 direct, indirect and induced jobs, more than \$157.6 million in total state GDP, \$12.4 million in tax revenue impact and more than \$50.8 million in total wages in FY2019.⁴⁰



Citizen Paint Project, *34th Street Mural*, 2011, Mount Rainier, Maryland, [Hyattsville CDC](#).

The [Gateway Arts District](#)—the largest and oldest certified creative district in Maryland—exemplifies the power of the arts to galvanize economic and community development. This creative corridor was formed in 2001 and runs for two miles

through the heart of four small towns (Mount Rainier, Brentwood, North Brentwood and Hyattsville). Well known for its renovated buildings, distinctive architecture, attractive landscaping and public art installations, it is an innovation hub for a significant and growing population of artists, art lovers, families, commuting professionals and students.



Discover the Arts, Prince George's County, Maryland, [Gateway Arts District](#).

Not only does this creative district preserve and expand Prince George's County's creative economy, it is home to an array of restaurants, coffee houses, local and regional theatres, galleries and entertainment, and local arts and crafts stores. It has created an environment where artists can play, live and work and where commerce thrives on cultural activity and a climate attractive to both businesses and residents.

According to the Towson University study, the Gateway Arts District added \$4.8 million to the state GDP in 2019 and paid \$1.4 million in wages and compensation through new business startups, cultural events and festivals occurring in 2019.⁴¹ To further capitalize on this economic productivity, Gateway Arts District, in conjunction with [Hyattsville Community Development Corporation](#) (the operator of the Arts and Entertainment District), has future plans to extend the creative district neighborhoods with the support of growing retail businesses in the area. According to Stuart Eisenberg, executive director of Hyattsville Community Development Corporation, Prince George's County's creative economy supports the quality of life in the area, and the development projects within the district have maintained positive momentum during past recessions. Although today's postpandemic

environment may prove very difficult, the arts in Prince George's County have been inventive and resilient in coping with prior economic crises. This resourcefulness will be invoked again as artists and businesses in the district cope with the effects of the pandemic and work to help the county achieve.

Film and Digital Media Industry Growth in Prince George's County

Prince George's County has a potential future growth opportunity with film and digital media, too. Since 2000, 78 films and 5 television shows have been shot in the state of Maryland. Many productions have decided to film their shows in Maryland due to its close proximity to Washington, D.C. "Washington can be restrictive about what can be filmed due to security reasons, so Maryland is close enough that if you just want to take a day and do a couple shots ... you're close enough [to D.C.] to be able to do that at a fairly low cost," says Chris Kaltenbach, entertainment reporter for *The Baltimore Sun*.⁴² This opens the door to new opportunities in film and digital media initiatives in Prince George's County.

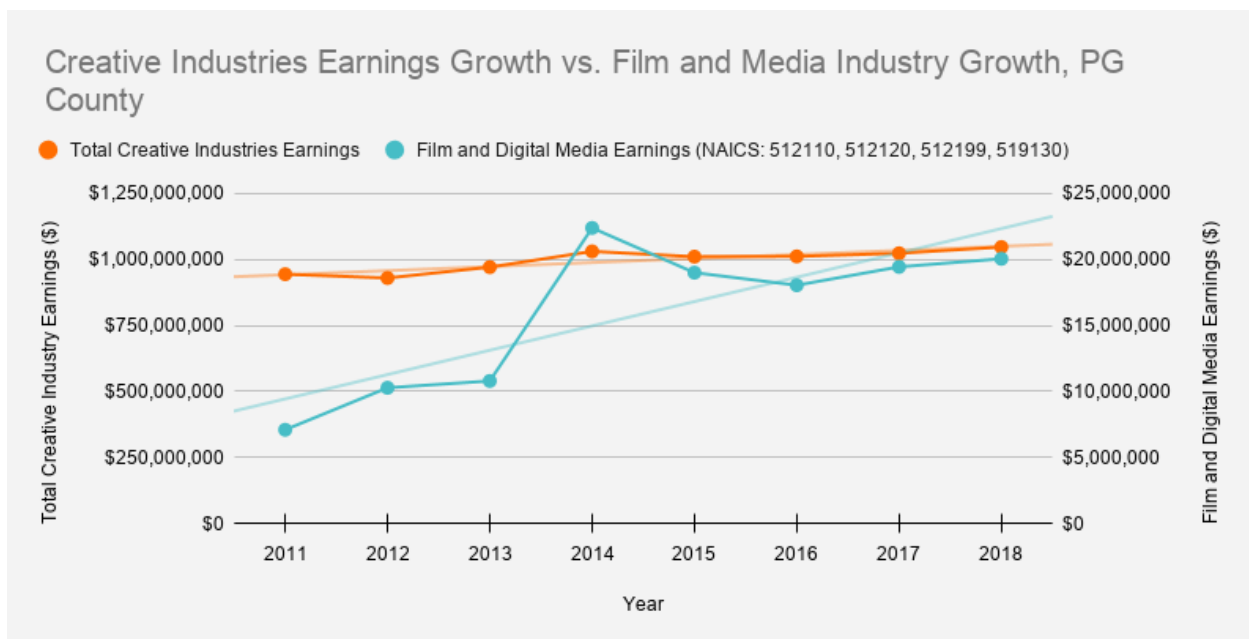


Figure 9. Creative industries earnings growth vs. film and media industry growth in Prince's George's County, MD, CVSuite, 2020

Creative Vitality Suite data shows the comparison of Prince Georges County film and digital media earnings compared to the overall creative industry earnings in the region. Between 2011 and 2018, the film and media industry grew at a more significant rate than the creative economy as a whole. In 2011, the state of Maryland passed the Maryland Film Production Employment Act, which replaced an older state incentives program.⁴³ According to the [Maryland Film Office](#), the new act enabled movie production crews to receive a tax rebate of up to 25% of direct costs⁴⁴ to incentivize production crews to film in Maryland. Works being filmed in Prince George's County in 2020 will air on Black Entertainment Television and in AMC Theatres.⁴⁵ The prospect of increased film activity also has influenced new networks to start up, such as [Creative Edge Collaborative](#). Creative Edge Collaborative is a filmmaking community based in the Gateway Arts District whose mission is to create

strategic partnerships in combination with creative placemaking and arts incubation services for the film and digital media industry. It supports the growth of current and future media professionals and entrepreneurs.

Prince George's County has many creative assets that the community can build upon as key institutions continue to plan improved ways of supporting arts and culture across the county. The county also has cultivated arts leadership that understands how to bring arts and culture more firmly and confidently into discussions about the county's economic future.

Creative Ecosystem Building in Western Massachusetts

Next generation arts jobs program leverages the creative sector

Western Massachusetts is a region with a thriving arts and cultural life and a community that has seen firsthand how arts and cultural institutions and the creative economy can revitalize areas destabilized by deindustrialization and other economic forces. [Mass MoCA](#) (Massachusetts Museum of Contemporary Art), [Tanglewood Music Festival](#), [Jacob's Pillow](#) and other leading arts organizations have contributed to stronger economies and communities in the region for decades. These organizations, and a range of influential smaller ones, are now host sites for a groundbreaking new initiative, [Artists at Work](#). The program aims to contribute to the resilience of the region's creative sector while providing direct employment to the individual artists who drive the success of this vitally important industry in the region's economy.

Emergence of Western Mass as a Creative Region

Western Massachusetts, which includes the Berkshires, Franklin, Hampden and Hampshire, is in many ways the perfect incubator for the new Artists at Work initiative because the region has a history of activating its cultural assets for economic renewal. An analysis of the region using the Creative Vitality Suite shows that the region has a Creative Vitality Index score of 1.27, illustrating the stronger concentration and impact of the creative sector on the region's economy than in the nation as a whole.

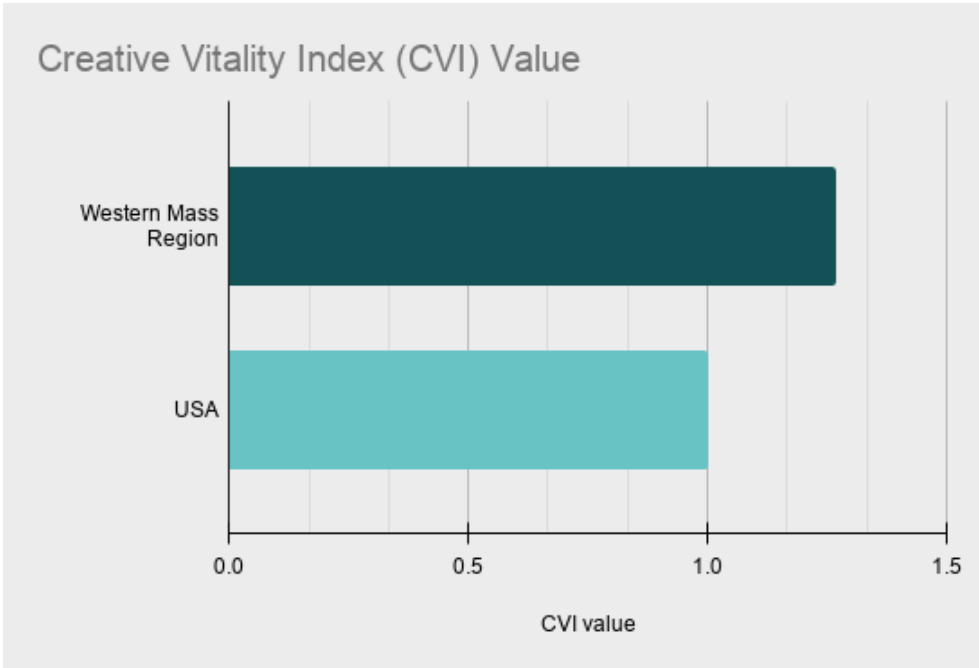


Figure 10. Creative Vitality Index Value comparison, Western Massachusetts and USA, CVSuite, 2020

“We chose Western Massachusetts to pilot Artists at Work, because the region has answered the question of whether culture can be an economic driver. We knew we did not need to convince people that the creative economy, particularly artists, can contribute to the prosperity of an area.”

Rachel Chanoff, Artists at Work

One of the drivers of the development of the creative economy over the past 20 years has been the difficult transformation of the region’s economy. This is particularly evident in North Adams, where the decline and closure of Sprague Electric in the 1980s and 1990s set an unlikely foundation for the opening of the Massachusetts Museum of Contemporary Art (Mass MoCA). The closure of the plant led many to leave the area and local employment was reported to have risen to more than 14% during the exit.⁴⁶ Rachel Chanoff, curator for performing arts and film at Mass MoCA and an architect of Artists at Work through a private curatorial firm, witnessed firsthand the transformation of the former Sprague Electric site into Mass MoCA. Chanoff describes the strength of the institution’s (initially unlikely) contribution to the economic reemergence of North Adams in these terms:

North Adams is really the lens to see the effect of the Great Recession and other economic change on the creative economy in Western Mass. Pre-2008, the Sprague Electric factory closed, and a massive percentage of the population was connected to it at the time. North Adams fell off the tax rolls, and they were considering paths forward like a shopping mall, a prison, or developing lakefront real estate. No one was thinking of a contemporary art museum as an economic development opportunity, but Mass MoCA really emerged as a major employer, economic driver, and amplifier that supported the development of hotels, restaurants, and other businesses locally. Because of what we saw firsthand, there is not a question about whether the arts can be an economic driver in a region. Culture is an economic driver. 2008 stopped the trajectory to some extent, but culture was already part of the recovery path and the continued relevance of Mass MoCA during and after the Recession reconfirmed this.



Dancer Dante Brown is collaborating with the nonprofit Roots Rising to promote sustainable farming and food access through the Artists at Work initiative. Photo courtesy of Jacob's Pillow, September 3, 2020

A 2017 study by the Center for Creative Community Development at Williams College finds that “the local economy is nearly \$51 million larger each year because of MASS MoCA operations and visitors, and if MASS MoCA were not present there would be at least 586 fewer jobs in the county, increasing the local unemployment rate by nearly a full percentage point.”⁴⁷

Despite its impact, this isn't a success story of just one visionary institution. The Tanglewood Music Festival and Mass MoCA together bring more than \$150 million to the local economy every year, largely through cultural tourism.⁴⁸ Jacob's Pillow Dance Festival, the Williamstown Theatre Festival and a number of museums are additional influential anchors across this region. Artists at Work has been developed in partnership with these and other organizations in order to showcase the impact and continued relevance of these “cultural hubs” as anchors even during the pandemic.

Beyond influential arts and cultural organizations, the creative economy of Western Mass has also been purposefully catalyzed by multisector initiatives like the [Pioneer Valley Creative Network](#), a collaborative of public and private partners that works to connect and expand opportunities for artists and creative businesses in the three

counties of the Pioneer Valley. The companies, chambers of commerce, tourism councils, universities and other educational institutions, local governments, and cultural and business improvement districts that participate in this network collectively reach and connect thousands of artists and creative businesses with these activities each year. The region's community foundation, community colleges, and public and private colleges and universities are also catalysts and drivers of the region's creative economy through investment, research, network building, educating the workforce and many other efforts.

Independent Artists as a Growth Industry in Western Mass

While the term "growth industry" often conjures notions of high-tech companies and venture backed startups for those for whom that term is even meaningful, in this region it accurately describes individual artists as a key industry in the local creative economy. In Western Massachusetts, Creative Vitality Suite data analysis, using U.S. Bureau of Labor Statistics data, shows that the earnings of independent artists in the region grew markedly from 2015-2018 after having largely maintained a solid earnings level in the prior four years. Between 2015 and 2018, the earnings of independent artists increased by more than 45%, earnings which in turn are passed on to the local economy.

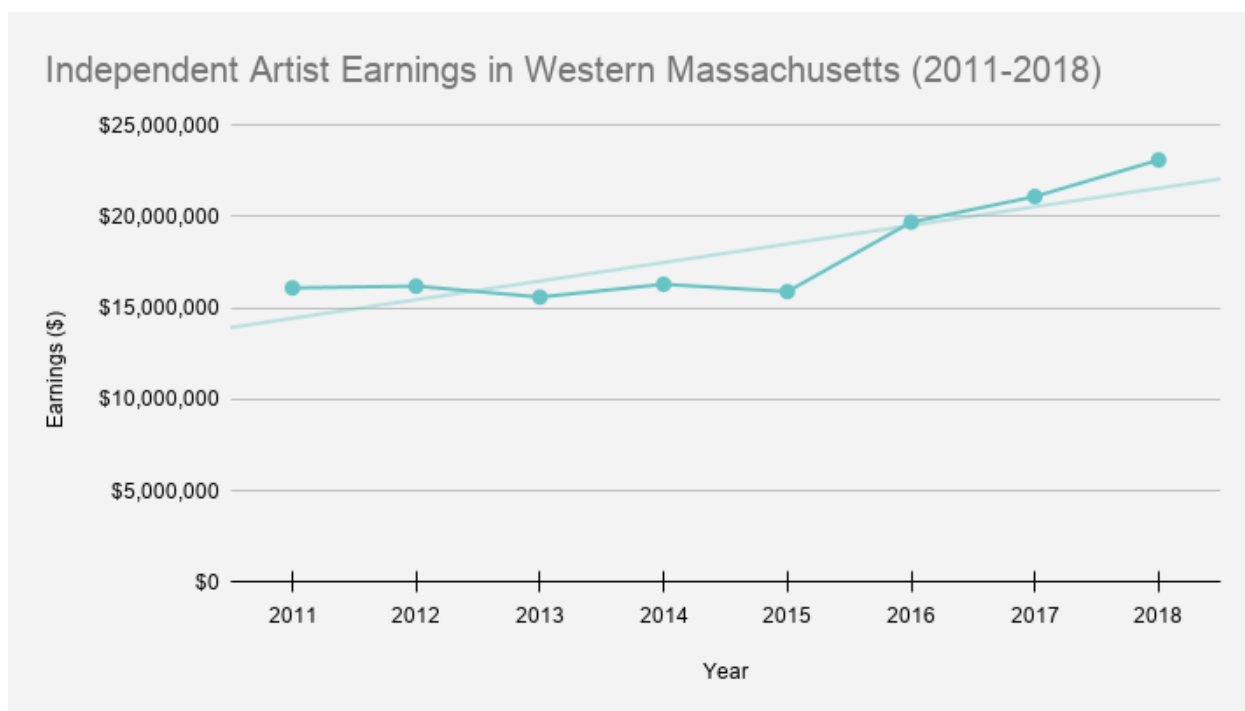


Figure 11. Independent artist earnings in Western Massachusetts (2011-2018), CVSuite, 2020

One can readily assume that the pandemic induced economic crisis has negatively affected this broadly positive trend. It is in this context that a network of organizations across the region welcomed Artists at Work as a pilot initiative to amplify the resilience and impact of the region's "creative ecosystems."

"The pandemic is a scorched earth moment, but eventually we will be in seats. Artists are leading us into this transition, and we need to weave what artists do into everyday life."

Rachel Chanoff, Artists at Work

Working Artists and Creative Ecosystems

Artists at Work, in many ways a next-generation jobs program, has been developed to build new models for supporting the regional economy that centers on artists. Artists at Work is led by independent curator and production company [THE OFFICE performing arts + film](#), which launched a pilot program in Western Mass in July 2020. According to Chanoff, the lead architect of this initiative, Artists at Work has been designed to offer artists a living wage, paid for 6 to 12 months, to work with cultural institutions (hubs) that are vital to the region's creative economy, and with social impact organizations on arts education and community initiatives that are meant to drive civic participation and engagement. Through the Artists at Work initiative, local creators and cultural organizations are connecting to local initiatives in areas such as youth mental health, suicide prevention, food access, youth at risk, campaigns for COVID-19 awareness in communities of color and other civic engagements designed to foster healthy communities.

"We not only want to pay artists for making the beautiful work they create within their own artistic practices, but the second deliverable of the program is that they are also embedded in a local social impact initiative and hosted in a local cultural hub. We were thinking about what we can do to impact an entire ecosystem rather than simply a part of the ecosystem."

Rachel Chanoff, Artists at Work

The idea of an “artistic dividend” has been advanced by leading regional economist Ann Markusen since the early 2000s.⁴⁹ This research has shown empirically that artists produce dividends through income streams that connect them with producers and consumers inside and outside of the region. Even though this idea has long been recognized, as new research on the creative economy of the region points out, “there is no dearth of policy recommendations for the so-called creative sector. Policies that consider the specific contours of the artistic labor market, however, are lacking ... effective policies must be tailored to the specifics of that region’s artistic community(ies) ... [as] the needs and assets of artists and artisans are place-specific, shaped by regional institutions, culture, and economic forces.”⁵⁰ Artists at Work tests new strategies to support the artistic labor market to leverage the regional artistic dividend in ways that respond to the specific context of place.

The lessons learned from the six artists involved in the initial summer 2020 pilot program of Artists at Work are designed to inform larger-scale and longer-term creative workforce strategies in the future. A robust creative economy can, in turn, help the region's larger economy to meet the new challenges in the wake of business and venue closures caused by COVID-19. In addition to building civic capital during a vulnerable time, Artists at Work is building new workforce structures and partnerships that will help to sustain the regional economy in a postpandemic setting.

Red Wing: Minnesota’s Micropolitan Creative Capital

A community builds upon its cultural and creative assets in a growing rural region

For more than a decade, Red Wing has been recognized as a burgeoning creative hub in southeastern Minnesota due to its major creative companies, iconic arts and cultural institutions, scenic outdoor attractions, and strong cultural tourism. In 2008, the National Trust for Historic Preservation placed Red Wing on its distinctive destinations list, noting its “treasure trove” of historically important architecture and its prized natural environment.⁵¹ That same year, *National Geographic* named Red Wing the top 23rd historic destination in the world.⁵² A 2015 [Creative Minnesota](#) study found that the economic impact of Red Wing’s nonprofit arts sector was the 12th highest in the state.⁵³ This study found that the city’s nonprofit arts sector alone contributes a total of more than \$2.2 million to the local economy annually.⁵⁴

Red Wing benefits from historic arts organizations, such as the [Sheldon Theatre](#), as well as a broader set of growing organizations and institutions that support creativity, innovation and entrepreneurship, such as the [Red Wing Innovation Incubator](#) and [The Cultureshed](#). Cultural tourism is key to the development of the creative economy in the area; 84% of arts and culture attendees outside of southern Minnesota said they came to Red Wing specifically for an arts and culture event.⁵⁵ The local community is finding opportunities within these creative and cultural assets to bolster this rural, small city’s economic conditions and improve its outlook for the future.

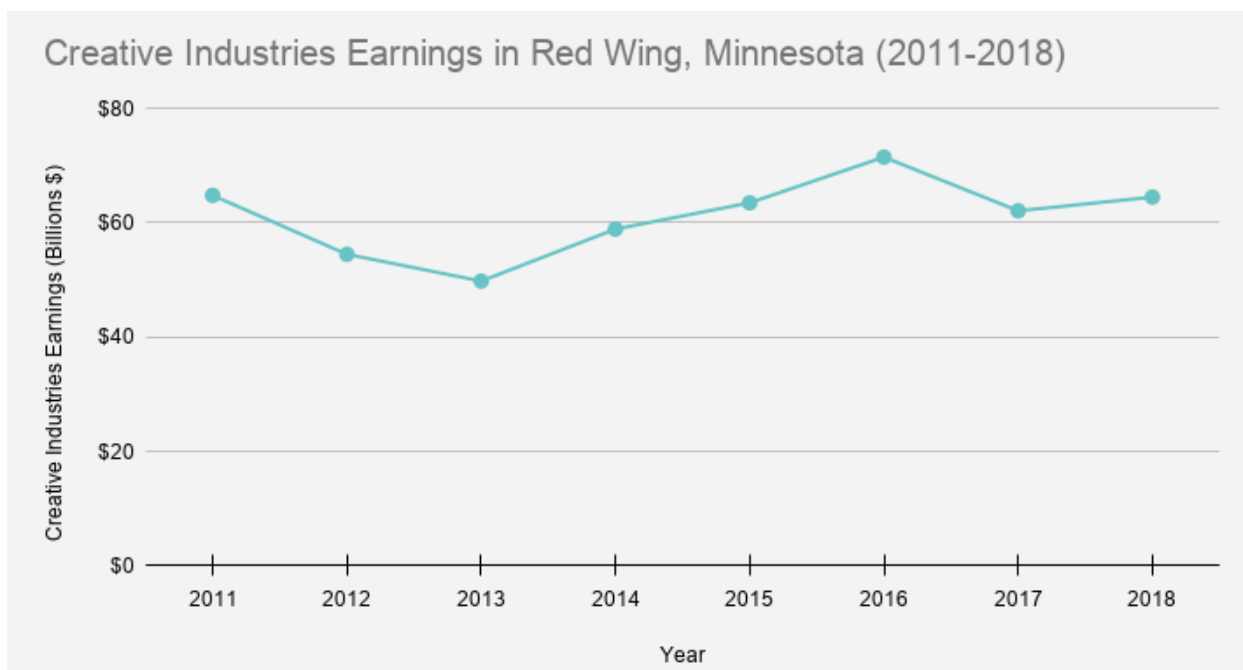


Figure 12. Total creative industries earnings in Red Wing, Minnesota (2011-2018), CVSuite, 2020

Creative Vitality Suite data shows an increase in Red Wing's creative industry earnings (income that flows through the southern Minnesota economy) over the five-year period from 2013-2018. This increase follows the development of an initial mapping and action plan that was developed by a group of volunteers, including local creative entrepreneur John Becker, a former member of Red Wing's City Council.

The Creative Potential of Red Wing's Wider Economy

Across a broad spectrum of economic measures, the Red Wing economy has not fully recovered from the Great Recession.⁵⁶ The 2017 [Red Wing Report Card](#) revealed that the city's median household income declined by 26% from 1999 to 2015, and poverty doubled over that same period. However, Red Wing's unemployment numbers began to drop off considerably after 2010.⁵⁷ Red Wing is also one of Minnesota's "power plant communities," a classification that affords it a range of assets and challenges. In 2017, Xcel Energy's Prairie Island Nuclear Generating Power Plant accounted for 56% of the local tax base and was the provider of some of the highest-paid jobs in the area.⁵⁸ The future of this significant local income source is uncertain, as the plant will be decommissioned in 2033 or 2034 unless its federal license is extended. This vulnerability calls attention to the urgent need for economic diversification to protect the city and region's future.⁵⁹

The presence of creative businesses in Red Wing supports the city's economic diversification and workforce efforts. In addition to its iconic designs and ties to the global apparel industry, [Red Wing Shoes](#)'s boots and protective work products connect the company to members of the energy and wider manufacturing workforce across the country and the world.⁶⁰ Red Wing Shoes is not the only global company present in the community. As was pointed out by the American Petroleum Institute, "Put simply, Red Wing is a small town with big ambitions. Home to the headquarters of [Riedell](#), [Koozie Group](#), and a [3M](#) plant location, this community of 16,000 has an oversized impact on the world. And that's good news for the local economy. As of September 2019, the area's unemployment rate was about one point lower than the national average."⁶¹



Mural depicting the Mississippi Queen in Red Wing, Minnesota

Red Wing's manufacturing industry is an example of the "craft manufacturing"⁶² expertise that the city has developed over generations. From the historic clay pottery industry to Braille signage, custom fabrication and workplace safety equipment, the city's companies and its workforce are engaged in high-value manufacturing that relies on specialized and highly developed skills. Red Wing is building on these assets by encouraging the development of an entrepreneurial ecosystem in the town through [Red Wing Ignite](#), the [Red Wing Innovation Incubator](#), and The Cultureshed.

Cultural Tourism, Red Wing, and Southern Minnesota

Cultural tourism is another important component of Red Wing's creative potential. As Red Wing's 2040 Community Plan⁶³ articulates, "Cultural tourism is the fastest growing form of tourism, and visitors tend to spend more and stay longer than other tourists. Red Wing is an enticing cultural destination, so to capitalize on this form of tourism, we must offer multidimensional experiences and more depth of experience. There is a great synergy between the arts and outdoor recreation, and Red Wing has an opportunity to build on those two great assets."⁶⁴ One of the regional strategies being pursued by the [Southern Minnesota Initiative Foundation](#) and its partners is to

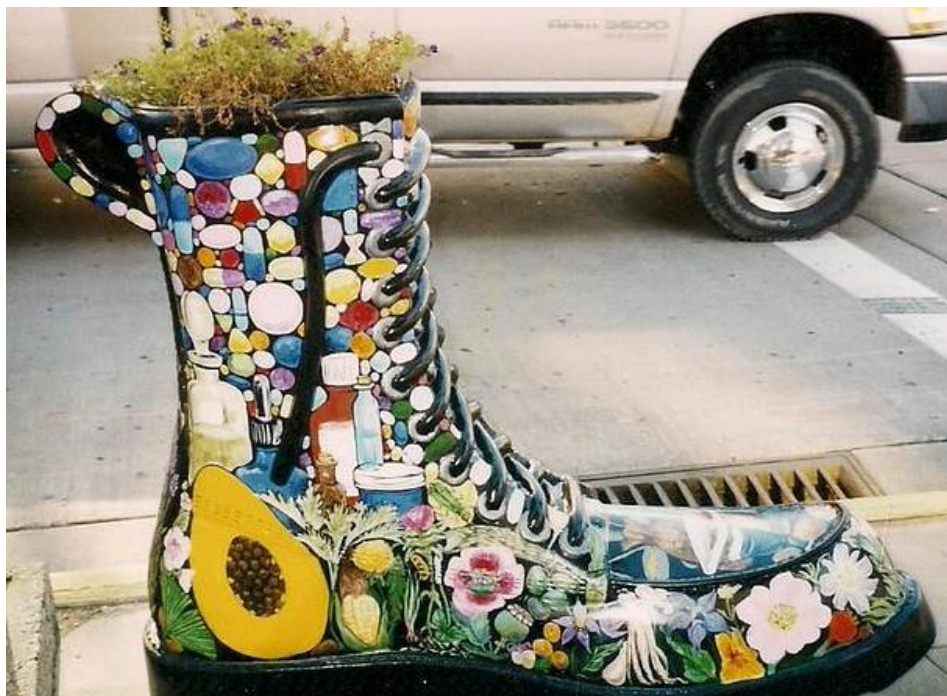
position the region as a distinctive destination. Tim Penny, president and CEO of the foundation, suggests that this is about leveraging the charm and character of Red Wing and other communities in this region, including the eclectic arts experiences they offer.

“Southeastern Minnesota is still a largely undiscovered area and Red Wing is no exception. The arts are critically important to enhancing our local economies through tourism, and we could create a synergistic cultural destination across our region. Historic buildings and mainstreets augmented by arts activity are drawing people into these communities who discover the other magical features of our communities.”

Tim Penny, Southern Minnesota Initiative Foundation

For Red Wing, 20% of its arts and culture attendees are from outside of Southern Minnesota. Given these encouraging statistics and the considerable recognition the city has garnered as a noteworthy historic and scenic destination, the city's development plans include more effectively marketing its arts and cultural experiences and broader efforts to position Red Wing as a regional destination. Penny argues that more regional marketing, including a more coordinated marketing strategy around tourist attractions of the region and its cultural offerings, would benefit communities across southern Minnesota.

During the pandemic, Red Wing has reformatted major destination events,



"boot" by Ruin Raider, public art work in Red Wing. Licensed with [CC BY-NC-ND 2.0](https://creativecommons.org/licenses/by-nc-nd/2.0/)

like the [Red Wing Fall Arts Festival](#), to allow for social distancing so that it can continue to offer these experiences to its residents and to visitors.⁶⁵ Red Wing also continues to consider investments in public art during this time, another strategy that is part of the city's plan to not only serve the local community but also become more of a destination. The City of Red Wing recently commissioned [Forecast Public Art](#) to design a process to select an artist to address a landmark mound in the city that had become the target of graffiti. An indigenous Dakota artist, Marlene Myles, led a creative community education project around the Native landmark's significance to the Dakota community and its culture.⁶⁶

The vision established for arts and culture in Red Wing's 2040 Community Plan states that "Red Wing thrives as a creative regional arts and culture hub where every resident can participate." The city continues to work toward this aspiration, even during the pandemic and with the recessionary forces being experienced along with it. Since the Great Recession, this small town has built on its unique history to develop a creative economy that attracts people across the region and beyond to experience its rich cultural assets. And the community is committed to harnessing that power for the future. In the words of the Red Wing 2040 Community Plan:⁶⁷

"As a community, we have long understood the importance of arts and culture to maintaining and enhancing the strength and vibrancy of our community here in Red Wing. From the beginning of the effort ... [to] create a new plan called the Red Wing 2040 Community Plan, community leaders began thinking about the main ingredients in making a healthy community and acknowledged early on that arts and culture play a central role to economic prosperity, community well-being, and livability."

Red Wing 2040 Community Plan

Nebraska's Creative Surge

Creative economy growth, creative districts and Nebraska's economic future

Home to the Great Plains, Sandhills and the Panhandle's dramatic rock formations, the state of Nebraska is also home to unique communities that, by some accounts, have witnessed a "creative surge" since the Great Recession of 2007-2009. Nebraska's thriving and diverse arts and cultural life may come as a surprise to some, but it is increasingly visible to Nebraskans. Its leaders are charting a course to build on the creative potential of this resilient state with proposals to establish a certified creative districts program to capitalize on this success.



Photo courtesy of the Nebraska Arts Council

Asserting itself as an “opportunity economy,” Nebraska has faced considerable transformation since the Great Recession.⁶⁸ Agriculture and food production remain the principal industries in the state, and manufacturing jobs have declined markedly over the past several decades.

Creative Districts and Nebraska’s Path to Recovery

During this economic downturn, communities needed to find a way to be resilient in helping sustain Nebraska’s economy. New forms of creative placemaking and arts development began to emerge with record label companies and galleries making their appearance in major urban areas like Omaha and other parts of the state.

Creative districts can be pathways for the next generation of creative job growth in the state. Recent economic data for the regions participating in [Colorado’s Creative Districts](#) program, for example, showed that in communities participating in a designated creative districts program, creative jobs increased by 3% per year within the last five years.⁶⁹

During the 2020 legislative session, a bill to establish cultural districts was passed. The vision for the program is to establish cultural districts in communities and urban neighborhoods statewide that will develop place based strategies, to stimulate commerce and revitalize towns—strategies that have proved successful in other states.⁷⁰ Districts will be able to apply for certification and grants for support through the [Nebraska Arts Council](#).⁷¹

“Embracing the arts drives economic growth,” states Nebraska State Sen. Megan Hunt. “Creative districts allow communities to cluster hubs of economic activity around arts, culture, and heritage. They enhance an area as an appealing place to live, visit, and do business. These districts complement non-arts businesses such as restaurants, offices, retail, housing, and lodging.”

“Using a creative district program in a region that’s economically suffering is a good policy tool,” said Michael Seman, a regional economist who has studied Omaha’s music industry and wider creative economy of the state of Nebraska. Although creative districts may benefit a region’s creative vitality and community, as Seman notes, there are important considerations in implementing such initiatives. The cost of living in a local community can increase dramatically if this implementation is not carefully managed.⁷²

Nebraska’s Creative Economy Trends

An analysis of Nebraska’s creative economy using the Creative Vitality Suite shows that the region has a Creative Vitality Index score of 0.92 compared to a national

benchmark of 1.0, which illustrates a high concentration of creative industries that has a strong impact on the state's economy when compared with the nation as a whole. Creative Vitality Suite data also show that Nebraska's creative economy expanded from 2011-2018. Growth rates for creative occupations in Nebraska in this period are a positive indicator of a strengthening creative economy. Though there was some volatility, overall the number of creative jobs grew during this period.

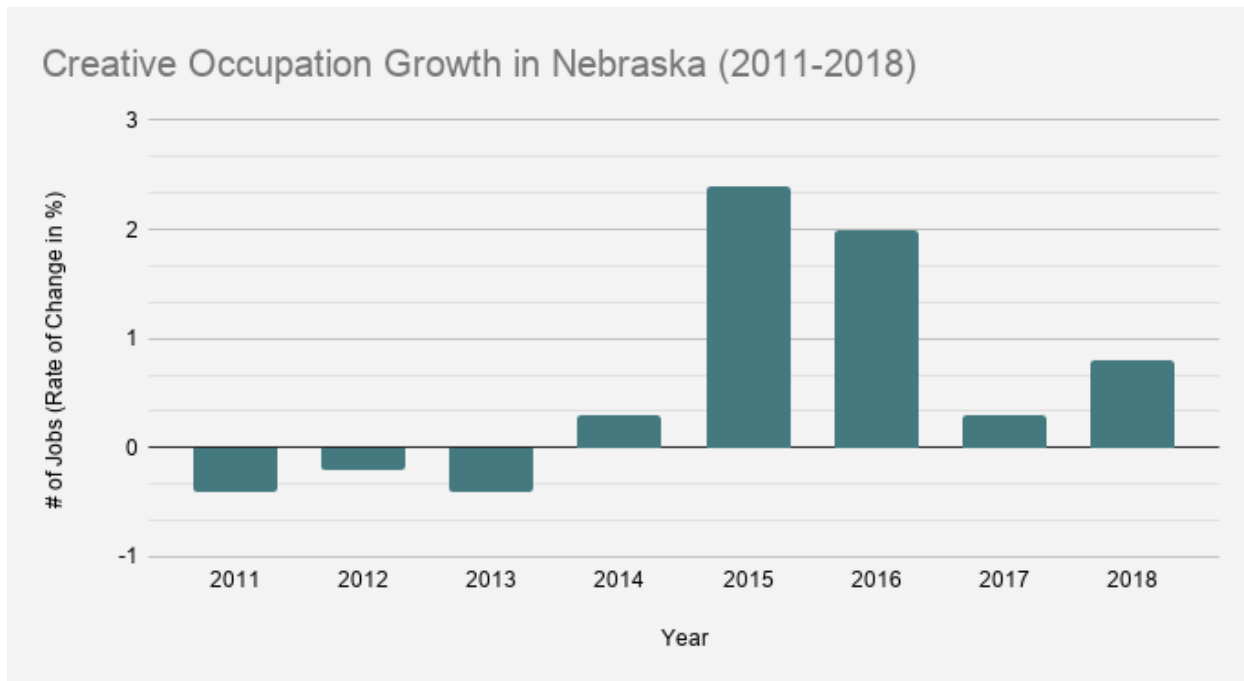


Figure 13. Creative occupation growth in Nebraska (2011-2018), CVSuite, 2020

Federal data also reflect the increasingly important role the arts have played as the state strives to rebound from the Great Recession. According to U.S. Bureau of Economic Analysis data, the arts add \$2.94 billion to the state economy, a figure that has grown by 31% since 2009.⁷³ [Bemis Center For Contemporary Arts](#), [Joslyn Art Museum](#), and [Kaneko](#) are just a few of the highly successful and visible examples of this development, but the growth of these anchor arts institutions isn't the only story of creative growth in the state. Independent artists and creative microenterprises contributed to the state's cultural vitality, particularly during the recession, by creating co-ops, small galleries, and podcasts to expand arts and cultural experiences beyond some of the major philanthropically supported institutions.



Photo courtesy of the Nebraska Arts Council

The state of Nebraska currently is battling the dual effects of the 2020 pandemic and devastating floods. People are being evicted and losing their homes,⁷⁴ food benefits are scarce, and unemployment rates are projected to increase through 2021.⁷⁵ The losses include creative workers in Nebraska, about a third of whom lost their jobs in the first half of 2020 due to COVID-19 closures.⁷⁶ Looking ahead, it is vital that Nebraskans utilize every available tool to recover their economy and ensure that every community has tools for resilience.

Bolstering arts and cultural opportunities in the state is a priority of [Blueprint Nebraska](#), a prosperity building initiative spearheaded by Gov. Pete Ricketts and other business leaders throughout the state. The initiative's formal recommendations, entitled "Growing the Good Life: Working to Create a New Standard of Economic Prosperity for All Nebraskans," notes that:

“Omaha weathered the recession better than any other U.S. city. Much of Omaha’s success is attributable to its ability to attract top talent with its lively arts and culture scene.”

Growing the Good Life, Blueprint Nebraska

The plan therefore aspires to extend that same advantage to other communities across the state and to “give Nebraska ... the most arts, cultural, and recreational opportunities per capita; and the most vibrant rural main streets in the country”⁷⁷ by “rejuvenating our communities, town centers, and meeting places through targeted investments (e.g., arts, entertainment, recreation and community planning).”⁷⁸



Photo courtesy of the Nebraska Arts Council

Creative districts can provide a means of targeting state investment and other incentives and develop partnerships that expand arts, cultural, and recreational opportunities in the way these ambitious plans intend.

“The kind of talent associated with high-skill and high-technology businesses want a rich environment to live work and play. Growing that environment will require modest, widespread investments combined with civic vision and imagination.”

*Nebraska’s Next Economy*⁷⁹

Creative districts have been shown to build bridges between communities, promote civic engagement,⁸⁰ improve business districts, and attract talent and investment.⁸¹ The arts also have been shown to support the development of a robust workforce,⁸² drive rural prosperity,⁸³ and provide positive experiences in a troubled world.⁸⁴ These are all assets and attributes that Nebraska—and every state—can effectively harness as it seeks to reinvigorate its economy.

Craft Culture: Appalachian Tennessee's Creative Niche

Paving the way for artisanal craftwork and cultural tourism

The Appalachian region consists of 420 counties across parts of 13 states (Alabama, Georgia, Kentucky, Maryland, Mississippi, New York, North Carolina, Ohio, Pennsylvania, South Carolina, Tennessee, Virginia and West Virginia). Appalachian Tennessee represents 52 counties within this vast region. Like much of the region, Appalachian counties in Tennessee had been dependent on coal mining as the major industry and source of employment for decades. But the coal industry has been in decline for generations. Following the Great Recession, the entire Appalachian region lost about eight years of job growth between 2007 and 2012 and lost more jobs than the rest of the United States combined.⁸⁵ Part of this decline was precipitated by a more than 45% decline in coal production in Appalachia from 2001-2015.⁸⁶



Joshua Woroniecki, *Low Misty Clouds Over Beautiful Winter Mountain Seen With Late Autumn Trees*, 2020, Gatlinburg, Tennessee, [Unsplash](#)

In the Appalachian region of Tennessee, the population has been shrinking in recent years and economic growth and wages are lower and unemployment higher than state averages. State government has a renewed focus on rural Tennessee and, as part of the [Appalachian Regional Commission](#) (ARC), has aligned these efforts with the vision established in this larger effort. ARC recognizes the role of natural and cultural resources as assets in economic and community development. One of its investment goals focuses on leveraging the region's natural and cultural heritage assets, particularly preservation, food assets, tourism opportunities and regional promotion.⁸⁷

Transforming Appalachia's Creative Economy through Arts and Crafts

Building on the rich history and cultural practices of the region, the creative economy in Appalachian Tennessee is vibrant. Although the region was adversely affected by the Great Recession, it remains a major attraction for cultural tourism, showcasing the work of many artists who specialize in arts and crafts such as basketry, weaving, spinning, carving, quilting, pottery, toy making and blacksmithing. Following the recession, the arts and crafts sector continues to be a popular means of generating an income for local residents due to unstable employment prospects.

“People have always been makers. It had its origin in making things for use or entertainment. There's a resurgence in interest in craft, and a lot of these people are finding that what they have and what they make can be sold. Sometimes this is an alternative to working in retail or a factory.”

Frances Day, Arrowmont

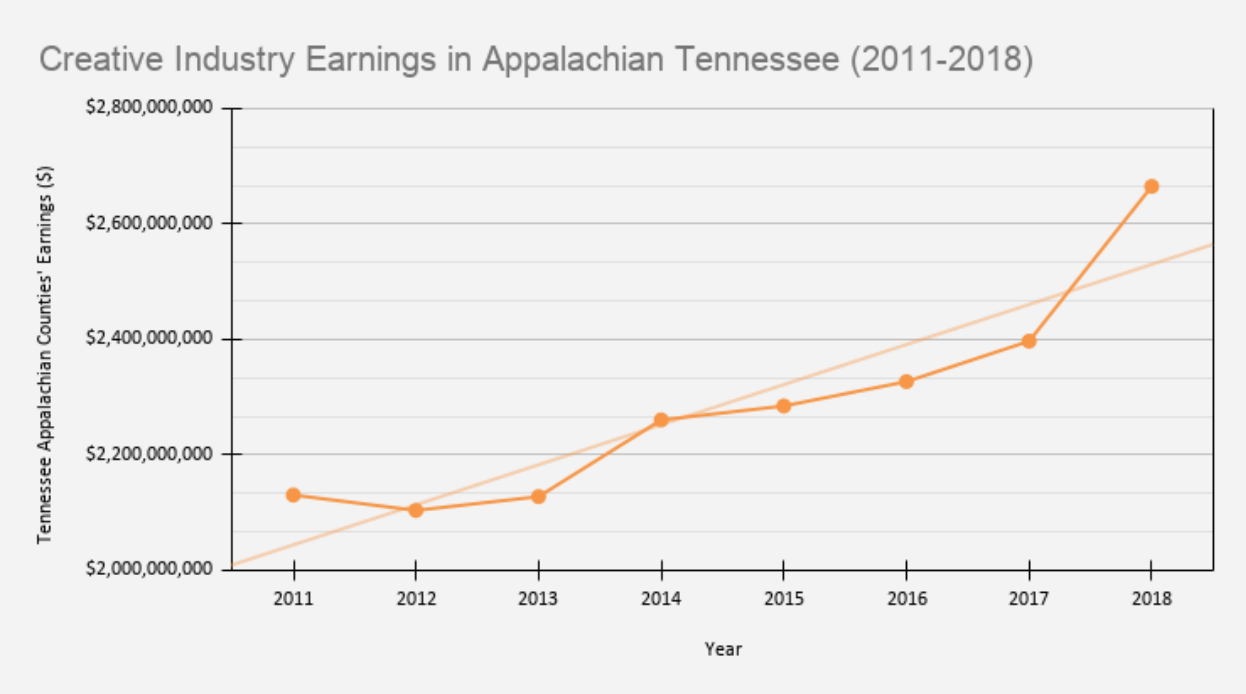


Figure 14. Creative industry earnings in Appalachian Tennessee (2011-2018), CVSuite, 2020

Creative Vitality Suite data show that Appalachian Tennessee’s creative industry earnings increased markedly from 2011-2018, growing by more than 25% over this period. Increased industry earnings support job and income growth in ways that benefit economies based on backward and forward linkages to other sectors of the economy, by organization and household spending within local economies.⁸⁸

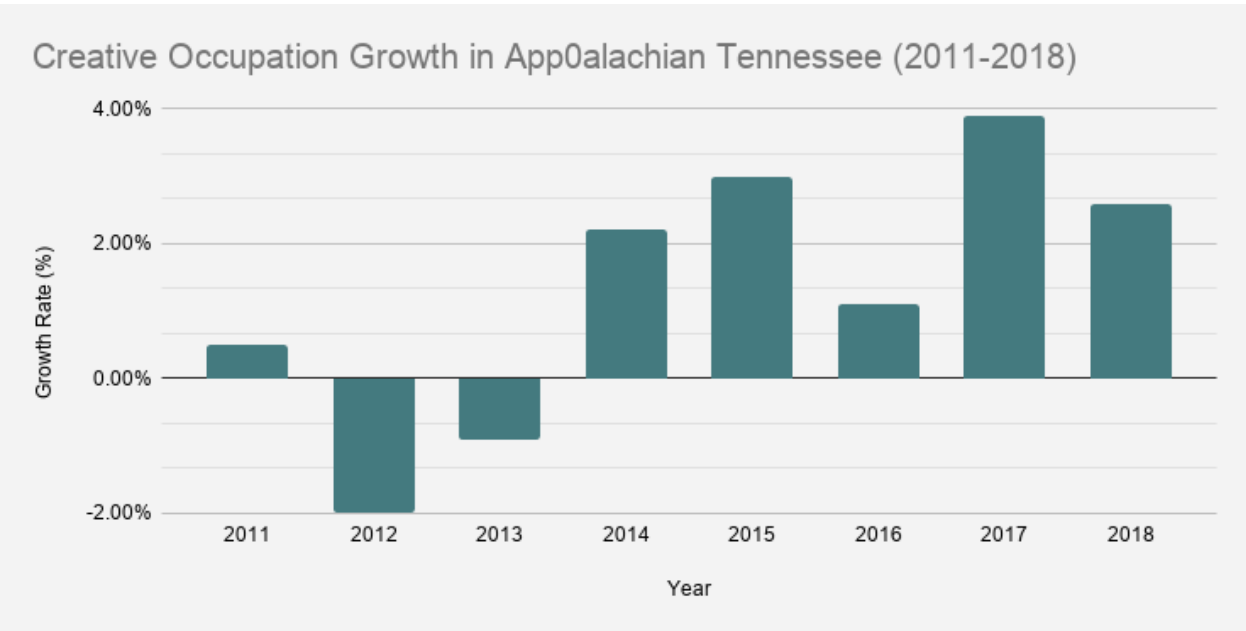


Figure 15. Creative occupation growth in Appalachian Tennessee (2011-2018), CVSuite, 2020



Robert Batey, Arrowmont School of Arts and Crafts Archives, Gatlinburg, Tennessee. [Robert Batey Photography](#)

Appalachian Tennessee's creative occupation growth rate also rose substantially from 2011-2018. This region, like other parts of Appalachia, was slow to recover from the Great Recession, but from 2012-2017 the creative sector was able to grow jobs by 7% over the same period.⁸⁹

In 2018, independent artists, writers and performers were the largest of the creative industries in the region and had the greatest number of jobs added between 2017 and 2018. This shows that the prospects for independent artists are critical to the health of the region's creative economy as a whole.

Educational institutions, such as the [Arrowmont School of Arts and Crafts](#), are among the many factors resulting in the region's growing creative vitality. Historically, the school has long supported the development of local craft into a nationally recognized industry that now draws a significant number of cultural tourists to the area each year. Today, Arrowmont offers a wide array of classes in contemporary arts and crafts for all skill levels and is well involved in offering university fellowships and scholarships for students.

Cultural Tourism and Appalachian Tennessee's Economic Growth

The tourism industry in Appalachian Tennessee is significant, attracting nearly 12 million visitors annually.⁹⁰ Tourism generated more than \$1.5 billion in gross revenue in 2019 for the city of Pigeon Forge alone.⁹¹ The craft, gift and specialty sector and theatre sector generate 12% of that revenue.⁹² From 2009 to 2019, total tourism revenue in the Pigeon Forge valley increased by 98%; theatre revenue increased by 67%; and craft, gift and specialty sector revenue increased by 120%.⁹³ In 2019, tourism generated \$2.6 billion in revenue for Sevier County as the whole.⁹⁴ Sevier County is home not only to Dollywood, but also to the extensive arts and crafts markets in the Glades, an eight-mile area that is a popular retail destination for tourists. The area also boasts the amusement park Ober Gatlinburg and mountainous trails like Mount

le Conte and Newfound Gap. During the pandemic, this community is still seeing a steady number of tourists flooding the area, even with a mask mandate in place.



Amy Baugess, Sky Bridge, 2019, Gatlinburg, Tennessee, via [Unsplash](#)

Diversifying Local Economies

Although tourism has contributed to the region's continued economic growth, it has not solved all economic issues when it comes to distressed areas. Poverty, largely driven by depressed earnings and wages, remains a critical issue in Appalachian Tennessee. The region's high poverty rate has led communities to consider other facets of the arts—integrated into place based community development—as a promising strategy. Across Appalachia, communities that are advancing arts based strategies like creative placemaking cite its benefits for economic diversification and what they call “placehealing.”⁹⁵ Economic diversification is an economic development strategy that, in the case of Appalachia, seeks to address the decline of major industries like coal, tobacco and manufacturing by building economic opportunity in other industries. Research in the region commissioned by the [Central Appalachian Network](#) shows that economic diversification is the most desired impact of arts based

strategies for development; 73% of survey respondents to a survey indicated it as a desired result of their work.⁹⁶ Placehealing is a community development strategy that in some aspects parallels the types of regional identity and regional marketing strategies that have become part of economic development, but focuses more on a community level sense of hope and pride and greater community cohesion.

Although predominantly rural, Appalachia also is home to a number of urban areas that are capitalizing on the region's craftsmanship and what many now call a "maker community" to support the economy and amplify the unique traditions and aesthetics of the region. In Knoxville, Tennessee, one of the largest cities in the Appalachian region, also called The Maker City, a movement of nearly a thousand maker businesses has emerged, bolstered by support from local government officials and online retailer Etsy. Research has found that makers can play a role in economic development, particularly as a complement to industrial retention and diversification efforts.⁹⁷ Researchers suggest that "maker ecosystems have potential to build urban creativity and distinctiveness, to spur innovation and to generate some new employment opportunities, both directly and via the multiplier effect."⁹⁸

Looking Ahead

The global pandemic has strained the creative sector as a whole, but it also has brought new opportunities. Cultural organizations and artists are inventing new ways to sustain the arts, whether through hosting performances virtually, selling their artwork online, or simply creating awareness about how others can help and be involved. Arrowmont, for instance, launched a new Virtual ArtReach Program for elementary schools that is making arts education supplies and lesson plans available to more than 1,100 2nd–12th grade students.⁹⁹ Knoxville's Mayor's Makers Council moved the annual Maker City online, providing technical assistance to help participating artists adapt their business models to e-commerce marketing and sales platforms, not only as a COVID-19 adaptation but also to strategically expand revenue options for the future.¹⁰⁰

Appalachian Tennessee continues to benefit from a large and resilient crafts sector, ingenious makers, and cultural tourism attractions that are both driven by and have a direct impact on the local arts community. Other regions looking to diversify and grow their economies can learn from the successes and tenacity of Appalachian Tennessee.

An Artisan Economy in Northeast Kingdom, Vermont

Northeast Kingdom's creative economy and rural economic development

The "Northeast Kingdom" of Vermont, set against the Canadian border and the upper Connecticut River, is home to Vermont's three most northeastern counties, Essex, Orleans and Caledonia. Northeast Kingdom (NEK) is the most rural—and least wealthy—region in the state. Occupying nearly one-fifth of the state's land mass and over 1/4 of its water, Northeast Kingdom is a densely forested rural area, but it boasts impressive historic, cultural and scenic assets. This includes 4 state parks, 13 historic districts, 30 public library branches, and roughly 25 museums and collections.¹⁰¹ The arts, entertainment, recreation, food and lodging sector ranks in the top five NEK industry sectors by number of jobs, at 7.5%.¹⁰²

The region's wide array of cultural amenities and artisanal goods is crucial to a prosperous future, as this portion of the state grapples with slow economic growth and lagging recovery from economic downturns. The [Northern Vermont Economic Development District](#) (NVEDD) notes that the region “faces many challenges that are rooted in the economic decline that has been the slow-rolling crisis of economic recession over this region for several decades.”¹⁰³ Unemployment in the Northeast Kingdom remained at recession levels for years following the Great Recession, even as the rest of the state moved back toward full employment.¹⁰⁴ The Northeast Kingdom had the highest unemployment rates in the state prior to the COVID-19 pandemic,¹⁰⁵ and during this period of economic disruption, the unemployment rate has risen to double Great Recession levels.¹⁰⁶ The region also has the highest rates of poverty, food insecurity, disability and incarceration in the state of Vermont.¹⁰⁷

Developing economic resiliency is a core principle of recent economic development efforts across the region, and the strategies being developed to do so aim “to leverage the area’s intrinsic and emerging assets to create sustainable economic opportunities that reflect the character and culture of the communities” of the Northeast Kingdom.¹⁰⁸ In its comprehensive plan, the NVEDD identified arts development—specifically, nurturing local artists, food artisans and arts organizations—as key strategies for growing businesses, enhancing economic competitiveness, creating a quality of life attractive to businesses and residents, and insulating the region from future economic shocks and crises.¹⁰⁹

Northeast Kingdom as a Creative Region

In an effort to bolster the impact of the region's creative resources on the local economy, the [Vermont Arts Council](#) partnered with the [Vermont Creative Network](#) to

conduct research on the creative economy of Northeast Kingdom in 2018 to examine the current creative economy and establish an Action Plan featuring recommendations to expand Northeast Kingdom’s creative core.¹¹⁰ This work intersects with a number of other economic development strategies that have been produced in recent years by the [Northeast Kingdom Collaborative](#), the [Northeastern Vermont Development Association](#) and others that position the region’s creative economy and cultural assets as economic drivers. The collaborative’s two regional focus areas are leadership development and advancing economic development through the intersection of the creative, recreation and food sectors. These three sectors are all strong and growing within the NEK economy (in terms of jobs growth) and all three have a role in marketing the region, contributing to quality of life and attracting tourism.¹¹¹ The development association calls for historic, cultural and scenic resources to be used in support of economic development and livable communities through the promotion of local and regional tourism; the promotion of local traditions, skills, crafts and the performing arts within the region; the designation of downtowns and village centers under the Vermont Downtown Program; and the support of local cultural resource initiatives to revitalize communities and downtowns.¹¹²



Spark collaborative work space in Greensboro, Vermont.
Photo by Beana Bern

“Rural regions have had a slow recovery process, but the Northeast Kingdom has a particularly strong creative economy for such a rural region.”

Amy Cunningham, Vermont Arts Council

According to the 2018 Building on a Legacy of Creativity: Understanding and Expanding the Creative Economy of Northeast Kingdom report, the region's creative economy represented 9.4% of all of its jobs and the concentration of those jobs was 31% higher than the rest of the country, indicating a significant number of existing creative assets that can be further developed through new creative economy development efforts.¹¹³

Creative Events and Food Culture Driving Year-round Business Cycle

In order to support their creative potential and mitigate a cycle of seasonal tourism largely driven by outdoor activities in snow season, some towns in the region, like Island Pond, have developed new arts, cultural and experiential events that are aimed to attract tourists and engage locals. The Destination Island Pond Event Series, started in 2016, organizes themed event weekends, which support local mainstreet businesses year-round. Many of these events feature the arts and have helped to bring year-round revenues into the community, which in turn has jump-started the creation of new businesses and stimulated growth in tax revenues from food sales and lodging.¹¹⁴ The events scheduled over all four seasons have joined more longstanding events in the area like Friday Night Live, a popular 10-week lakefront summer concert series led by the local chamber of commerce.¹¹⁵ Other well-known festivals and events in the area include a summer outdoor concert series at Dog Mountain in St. Johnsbury led by Catamount Arts and Wednesdays on the Waterfront concerts and Winter Festival in the City of Newport.¹¹⁶ These efforts build on and enhance the region's assets, including its outdoor recreation industry and its burgeoning sustainable food industry.

“The food industry and recreation (mountain biking and the ski industry) are all ideal partners for culture and tourism.”

Amy Cunningham, Vermont Arts Council



Levitt AMP concert, presented by Catamount Arts, St. Johnsbury, Vermont. Photo courtesy of Catamount Arts

The Northeast Kingdom is home to a wide variety of local artisans and craftspeople who support the tourism and creative vibrancy efforts that come with event based strategies. The region's strong concentration of creative workers is due in large part to the significant design and specialty food industries in the region that are taking advantage of local agriculture, such as [Couture's Maple Shop](#), which specializes in locally produced maple syrup and maple syrup products located in Westfield, and [Eden Specialty Ciders](#), which produces a range of ciders from locally grown apples in Newport. The region's food industry has made significant contributions to its creative economy over the last several years, and is the second largest subsector by employment, following design. According to the Building on a Legacy of Creativity report, 24.9% of the region's creative employment lies within specialty foods and the culinary arts, and it is the second largest creative economy subsector in the region.¹¹⁷ This segment of creative employment in the region, which employs 651 people, has received its most significant boost from the region's creative eating establishments and specialty food producers.

The nationwide sustainable food movement has provided opportunities for the growth of Northeast Kingdom's local food industry. As an example, the town of Hardwick has been enjoying a comeback as a result of its association with this national trend. "Recent decades have seen a remarkable transformation of Hardwick from a poor, blue-collar town dominated by boarding houses and eating and drinking establishments, to a nationally recognized focal point for the sustainable food movement."¹¹⁸ This trend also has inspired new interest in agritourism experiences like [Kingdom Farm & Food](#)'s Farm & Food Days, an annual event that celebrates the region's agricultural heritage that includes food businesses tours and meals, hay rides, and craft demonstrations.

Cunningham notes that attracting talent to the Northeast Kingdom is particularly advantageous and something the community needs for a strong local economy. New residents will help contribute to a younger and more diverse talent pool for this aging region. The arts and culture are helping to attract and retain a workforce and a tax base for the region as well as strategically developing intersections with other sectors. These strategies equip Northeast Vermont to withstand current challenges and those yet to come.

A Creative Edge in Suburban Washington State: Bellevue

A thriving creative economy and a growing gaming industry propel growth in a suburban tech hub

Bellevue, a culturally diverse suburban city outside of Seattle, Washington, is home to an emerging technology, virtual reality, and video gaming industry which has set the foundation for creative economy growth. Its broader technology hub consists of global companies like [Amazon](#), [Expedia](#), [T-Mobile](#), [CSAP Concur](#) and [Symetra](#) and is home to a significant and growing immigrant population. Following the Great Recession in 2009, Bellevue worked to strengthen its creative economy by focusing on key growth industries, like video gaming, while supporting the development of the region's arts and cultural organizations, particularly those that represent its growing immigrant communities. As a result, it adopted the [Creative Edge Creative Economy Strategy](#) in March 2018, which puts a focus on arts learning, digital technologies and diversity as transformative forces for the region. As Josh Heim, former arts manager of the City of Bellevue, shares, "We focused on figuring out who we are rather than trying to be something we're not, that's what's different about Creative Edge." The region's support of the creative economy is a core part of its economic and community development strategies that aim to contribute to the city's increasing urbanization and the opportunities and challenges that brings.

The creative economy remains a key part of current economic recovery strategies in Bellevue even as parts of the sector face considerable challenges due to the pandemic. Despite successful business attraction efforts, this suburban city's economy continues to face structural challenges that disadvantage some communities—challenges that have been exacerbated by COVID-19. Bellevue is increasingly diverse in terms of race, ethnicity and nationality, and the city recently became the largest majority-minority city in the state of Washington. Bellevue economic development strategists see the arts and cultural sector as an opportunity to build community cohesion and celebrate the diverse cultures that make up Bellevue while also creating an economic climate conducive to growth and opportunity for all.

The Great Recession had an overwhelming impact on employment in Bellevue. The Federal Reserve Bank Economic Conditions Index value for Seattle-Tacoma-Bellevue declined by roughly 10 percentage points from 2008-2009,¹¹⁹ and unemployment averaged nearly 10% in 2010 and remained more than 5% until 2015, according to the U.S. Bureau of Labor Statistics.¹²⁰ Job losses in the city were more significant than in the nation as a whole during the Great Recession, "with nonfarm payrolls averaging a decline of 3.2 percent a year from 2009 through 2010, compared with a 2.5-percent

average annual decline in the nation.”¹²¹ Bellevue’s comeback from the Great Recession, however, was strong. Between 2013 and 2018, employment in Bellevue increased by more than 17,500 jobs—a gain of 14.2%.¹²² Much of that jobs growth was concentrated in the creative sector.

As in many places, the pandemic halted economic growth in Bellevue. Concerns mount over unemployment and its potential to stall economic opportunity in the community.¹²³ Sustaining the creative economy, which provides work across a breadth of income levels, is an important part of recovery for the region. Research by the Seattle Jobs Initiative and the City of Seattle Office of Economic Development shows that the arts and entertainment industry in Seattle-Tacoma-Bellevue has lost the largest percentage of workers of all industries, with unemployment Insurance claims that account for 49% of pre-COVID jobs.¹²⁴ Stakeholders involved in strategizing Bellevue’s recovery recognize two key priorities: ensuring that low-wage workers and people of color, who are viewed to have been left out of the economic recovery after 2009, are not left behind, and ensuring the survival of the city’s arts and cultural sector.

Bellevue’s Transition from an Edge City to a Creative Tech Hub

Since the 1970s, the city of Bellevue had pursued traditional economic development strategies, such as downtown planning, public education, public transportation and a conference center, that aimed to position the community for economic success.¹²⁵ This infrastructure provided a foundation that allowed the city to be an attractive suburban area to live, work and do business. As *Seattle Times* columnist Jon Talton suggests, Bellevue is currently moving beyond its status as an Edge City and suburban transformation to a new kind of urbanism.

“The Edge City was a product of a moment in history that is mostly gone: cheap energy, abundant capital, sprawl development, hollowing out traditional downtowns and a willingness to travel long distances in single-occupancy car trips. That’s not where Bellevue’s future lies.”¹²⁶

Jon Talton, The Seattle Times



Bellwether 2018 mural by Baso Fibonacci. Photo by Bruce Tom

Aspiring to be “a vibrant and inclusive global innovation hub fueled by a highly educated, entrepreneurial, and diverse workforce,” Bellevue is now looking at systemic capacities and infrastructure, with an emphasis on partnerships, small business and entrepreneurship, workforce development, and the interconnected retail, creative and tourism sectors.¹²⁷

Within this framework, the creative economy is a major strand of the economic development strategy for the region. This strategy recognizes

that the arts and creativity are an important part of attracting and retaining creative workers in Bellevue, as well as creating the conditions for other industries to flourish. The challenge in Bellevue is to continue to expand the creative economy in a way that supports small creative businesses, builds cultural amenities, and takes advantage of a high-tech and culturally diverse environment.

Bellevue has a strong creative economy in comparison to other regions and to the nation as a whole. The Bellevue MSA's Creative Vitality Index score is 1.33 when compared to a national benchmark of 1, showing that the area has, on a per capita basis, a larger and more successful creative economy than the national average.

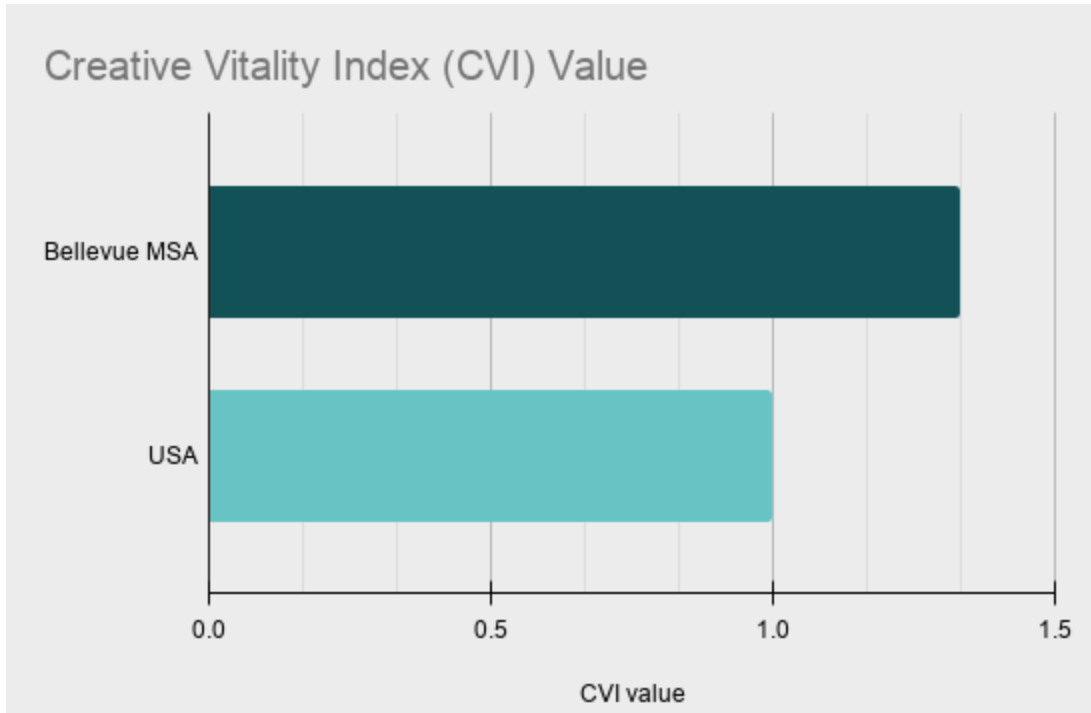


Figure 16. Creative Vitality Index, Bellevue MSA and USA comparison, CVSuite, 2020

Creative occupations have also shown strong growth in Bellevue over a sustained period. The visual below represents growth of creative occupations in Bellevue from 2011-2018, and shows that the labor market for creative occupations grew significantly from 2011-2018, achieving a growth rate of more than 4% in recent years.

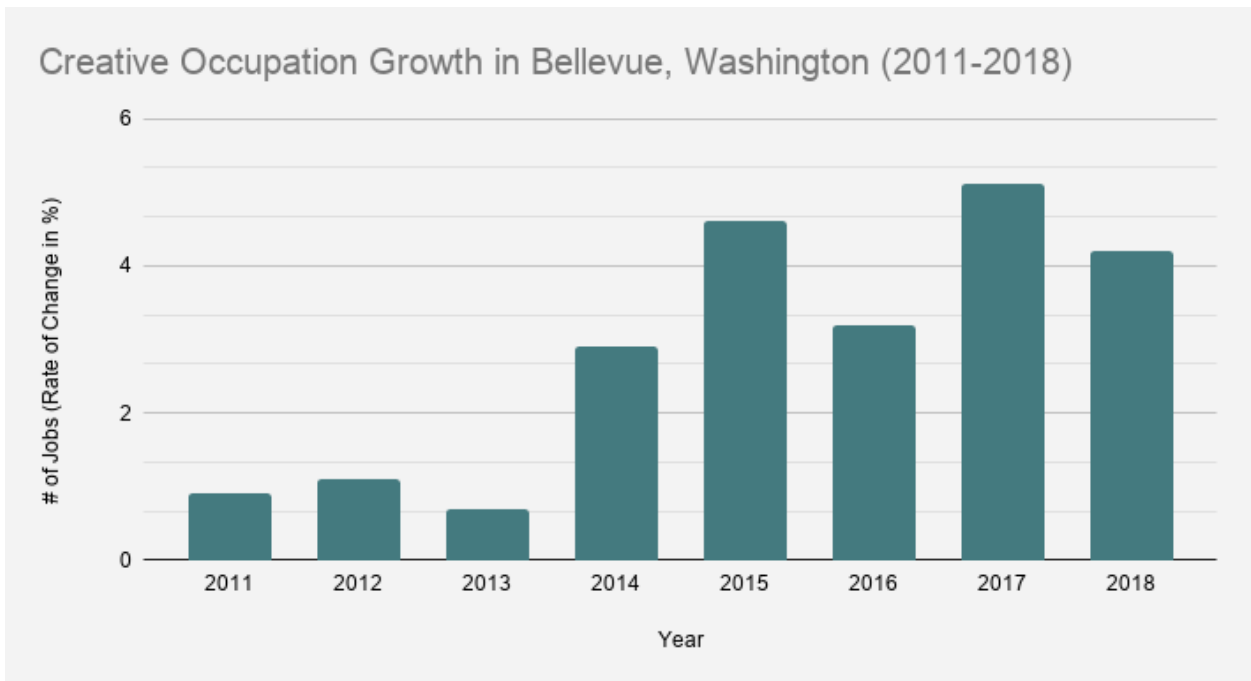


Figure 17. Creative occupation growth in Bellevue, Washington (2011-2018), CVSuite, 2020

These industry and occupational growth trends speak to the strong fundamentals of Bellevue's creative economy following the Great Recession. In addition to traditional arts and culture activity, more commercial and digital aspects of the creative economy showed continued growth during this period. Indeed, Bellevue's economic development strategists make a distinction between the "digital creative" sector and "traditional creative" subsectors of the creative economy, noting that the region is home to a number of global digital creative companies and that this subsector accounts for nearly 91% of Bellevue's creative economy in financial terms.¹²⁸

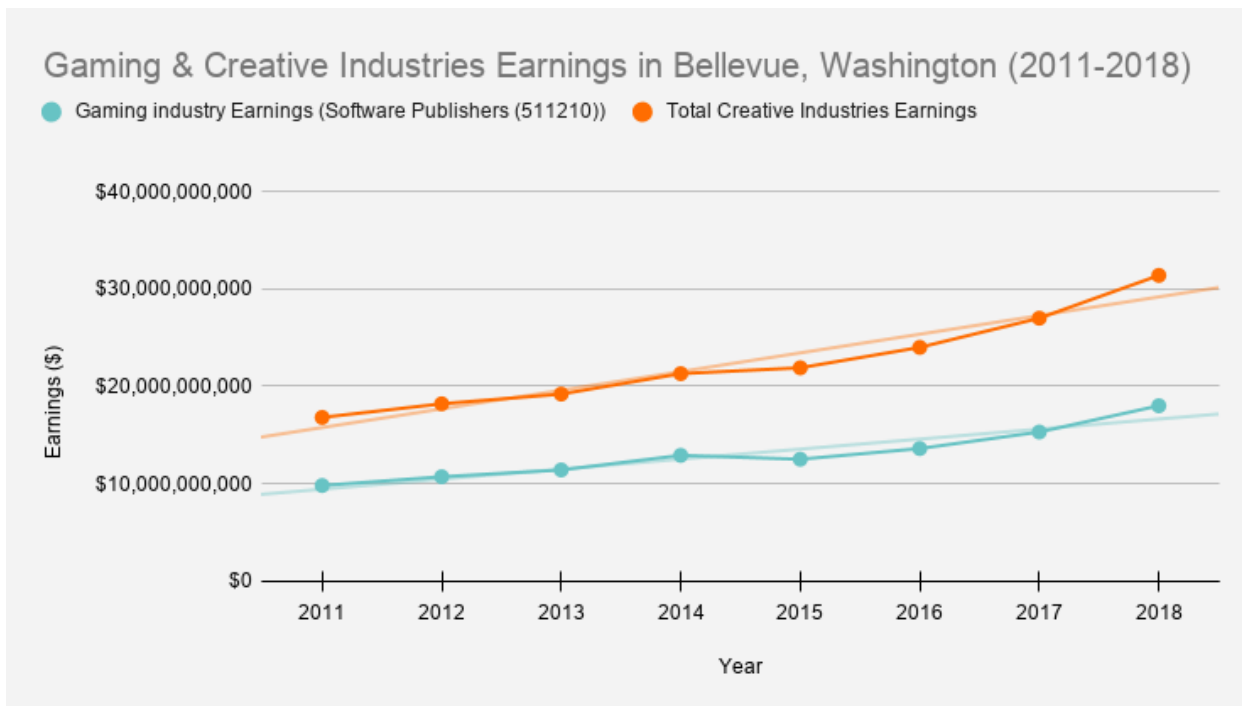


Figure 18. Gaming industry and total creative industries earnings in Bellevue, Washington (2011-2018), CVSuite, 2020

Bellevue's creative industry earnings steadily increased from 2011-2018. Creative Vitality Suite industry data, as shown in the visual above, reveals that the video gaming industry, in particular, regularly represented more than 50% of Bellevue's creative economy over the period 2011-2018. The earnings from the video gaming industry and software publishing increased by \$9 billion while the creative industry increased by \$15 billion over this period. Bellevue is ranked in the top five cities in the United States for interactive digital media and development opportunities.¹²⁹

[DoubleDownInteractive](#), [Amazon Gaming Studios](#), [Bungie Studios](#), and [E-Line Media](#) are just a few examples of some of the gaming companies that have contributed to this region's thriving economy. A June 2020 study ranked Seattle as the #1 gaming city in the United States based on gamer friendliness,¹³⁰ and in October 2020, amidst the ongoing disruption brought on by the pandemic, ProbablyMonsters unveiled a new studio for role-playing games.¹³¹

There are strong prospects for growth of this important industry on the horizon. Because the pandemic is increasing the popularity of gaming, the gaming industry is projected to bring in a staggering \$159 billion globally this year¹³²—a trend that bodes well for Bellevue’s continued success.



Ben Von Wildenhaus and Joel Cuplin in Bellwether, 2018. Photo by Bruce Tom

Because Bellevue’s gaming industry differentiates its creative economy and has positive prospects for short and long-term growth, there is a major opportunity to leverage this key industry as an economic and community development asset. There is a distinct opportunity to explore how Bellevue’s gaming industry can support the work of artists (animation, graphic design, music, etc.), while supporting policy-making for affordable creative space needs, cultural infrastructure and investment. One of the city’s recently adopted economic development strategy objectives is to “enhance Bellevue’s leading position in the digital creative sector and encourage linkages with the traditional creative sector where possible.” The plan also aims to “develop the built and institutional infrastructure needed to position the BelRed Arts District as a major destination,” and “promote and expand festivals, events and activities to grow the creative economy sector and promote a strong creative brand for Bellevue.”¹³³ While the strategy recognizes the strength of the digital creative sector, it also sets out a vision for the broader arts sector to contribute to destination marketing and tourism.

Celebrating Diversity and Bellevue’s Creative Economy

The creative economy is equally relevant in community development planning. An important set of community development opportunities faced by Bellevue is the city’s

demographic transformation. Like many suburban communities across the country, Bellevue's population is diversifying and, as mentioned, it has become Washington's largest majority-minority city.¹³⁴ According to 2015-19 data, 38.9% of Bellevue's population was foreign born and 42.5% of the population over age 5 live in a household where a language other than English is spoken at home.¹³⁵

Given these changes, the community has established efforts to strengthen community based programs to address the needs of a rapidly changing population. Bellevue's changing demographics are in many ways a defining feature in efforts to advance the arts and culture sector through culturally rooted creative placemaking, public art and community based festivals that bridge cultures.



Cole DeLeon in Bellwether 2019. Photo by Jonathan Vanderweit

The “diversity advantage,” as the City of Bellevue calls it, brings cultural, civic, community and economic factors together in defining a vision for the city’s continued advancement. The creative economy propels the community development outcomes the city would like to achieve through cross-cultural engagement in community life and the expression of diversity through arts and culture. The city also has an aspiration to grow as a culturally competent economy through the attraction of a diverse workforce and the increased availability of culturally specific goods and services sought by diverse cultures.¹³⁶

In sum, the arts, culture and creativity are forming the foundation of economic and civic well-being in Bellevue. The creative sector has become the city’s economic engine—one that is well positioned for postpandemic growth—as well as a potent strategy for building an inclusive community.

National Presence and Local Impact: Mountain Stage in West Virginia

Music venues deliver a diverse roster of talent to a national audience

West Virginia, a state in which the energy sector has historically dominated, appears to be making strides in diversifying its economy while dealing with persistent issues of poverty. The creative economy, and in particular the music industry, supports the economic aspirations of the state while contributing more broadly to quality of life and national visibility.

Energy—particularly coal and natural gas—has dominated the West Virginia economy for decades. The state is second only to Wyoming in coal production, and in 2017 produced 12% of the nation’s coal supply.¹³⁷ In 2017, coal alone represented 17% of the state’s economic output and continued to offer the highest average wages when compared with other industries in the state, including financial services.¹³⁸ In the wake of the Great Recession, however, coal production fell by 38% across the state, precipitated by a 71% decline in prices.¹³⁹ These forces have decimated individual incomes and regions within the state and reduced state and local government budgets.¹⁴⁰

Tourism as a Diversification Strategy

Economic diversification has become a key topic among policymakers in West Virginia, to avoid a boom-and-bust economy driven by commodity prices, and high-end tourism is one of the industries that has been identified in the state’s economic diversification plans.¹⁴¹ Leaders within West Virginia’s creative economy, like the nationally acclaimed [Mountain Stage](#), are among those advocating for a tourism-led economic development strategy that capitalizes on the state’s cultural resources. [Adam Harris](#), executive producer of Mountain Stage, is quoted by research firm Longwoods International as saying, “the economic impact of heads in beds the legislature can understand. This is a cool place to hear great, live music, have a handcrafted meal and shop for local handcrafts. People today are looking for a well-rounded experience that they discover themselves. Coming to town to raft is just one part of their trip.”¹⁴² Arts and cultural amenities are key tourism partners in the state and are recognized as a leading aspect of the quality of life that is important to attracting investment. In 2018, visitors to West Virginia spent roughly \$319 million on arts, entertainment and recreation activities, which led to direct employment of more than 12,400 workers.¹⁴³ The state actively promotes its cultural destinations, including art crawl tours of [West Virginia Certified Arts Communities](#) designated by the West Virginia Department of Arts, Culture and History.¹⁴⁴

Cultural tourism is an especially valuable strategy for the ruggedly rural landscape of West Virginia. Each community has its own blend of natural amenities, authentic culture and creative flair that can attract visitors and benefit the local economy. Tucker County, situated on the northern edge of Monongahela National Forest and home to fewer than 7,000 residents, is a good example. With prepandemic unemployment rates exceeding 6%¹⁴⁵ and poverty rates exceeding 15%,¹⁴⁶ Tucker County has been attempting to diversify its economy to augment the historic industries of timber, coal and seasonal snow sports. The county turned to cultural tourism as one of those strategies, establishing a [Tucker County Cultural District Authority](#) and developing a comprehensive plan to expand arts and heritage tourism while protecting and preserving the community's character and quality of life.¹⁴⁷ The arts and culture in the county are burgeoning. Together, the neighboring towns of Thomas and Davis boast three live music venues and more than a dozen studios and art galleries. Thomas hosts the annual ArtSpring festival while Davis hosts the Plum Tuckered Film Festival; Pickin' in Parsons, an award-winning Bluegrass festival, takes place in the county seat. Once-empty storefronts have been revitalized and a variety of visual, textile, craft and culinary artists and musicians have gravitated to the county.¹⁴⁸

Charleston's Nationally Influential Music Scene

Originally aired in 1983, Mountain Stage is an award-winning two-hour, live performance radio program hosted by Artistic Director [Larry Groce](#) and presented by [West Virginia Public Broadcasting](#). The show is recorded live, then aired on 240 public radio stations across America. Many of Mountain Stage's shows are recorded at the [Cultural Center Theater](#) in Charleston. Although the name Mountain Stage might suggest exclusively bluegrass to some, the show provides diverse programming in genres ranging from folk to indie rock. Mountain Stage has found a way to broadly showcase the talent of big-name acts as well as lesser-known musicians that would be far too financially risky for large commercial venues. Encouraging emerging artists in this way plays an important supporting role in the music ecosystem, helping performers gain useful experience and audience exposure. For example, a 1986 performance opportunity on Mountain Stage helped propel the career of Kathy Mattea, a Grammy-winning country music artist and native of Cross Lanes, West Virginia.



Andrew Bird. Photo by Brian Blauser/Mountain Stage

Mountain Stage is located in West Virginia's capital, Charleston, considered the state's cultural hub. The city's [arts scene](#) has benefitted from the recent development of Charleston's [public art](#) and cultural planning efforts, which have included the release of a [Public Art Tours Map](#) for its collection of nearly 250 public artworks. Charleston also hosts a number of annual festivals and fairs, including the [Vandalia Gathering](#) and [FestivALL Charleston](#), which features more than 100 events and 300 performances and exhibitions.

Charleston is part of the [Advantage Valley](#) region of West Virginia, viewed to be a major economic engine within the state in which arts and culture, recreation and a robust innovation infrastructure create conditions that can support business growth.¹⁴⁹ There is growing recognition that musicians, makers, cultural events and arts institutions are a necessary ingredient in the city's recipe for such growth.

“By integrating the arts into all community development activities we can create a virtuous cycle through which we strengthen our neighborhoods, attract new residents, and better support the artists who live here, who then support the next phase of growth in our community.”¹⁵⁰

[Greater Kanawha Valley Foundation](#)

Charleston’s creative economy is more robust than the state of West Virginia as a whole; the area has a Creative Vitality Index value of 1.83 when benchmarked against the state at a CVI value of 1. Accounting for more than 200 jobs in Charleston, the concentration of musicians and radio station workers is 38% above the national average, with Charleston employing more than 20% of the state’s music and radio station workers (based on Creative Vitality data analysis drawing on U.S. Bureau of Labor statistics data sets).

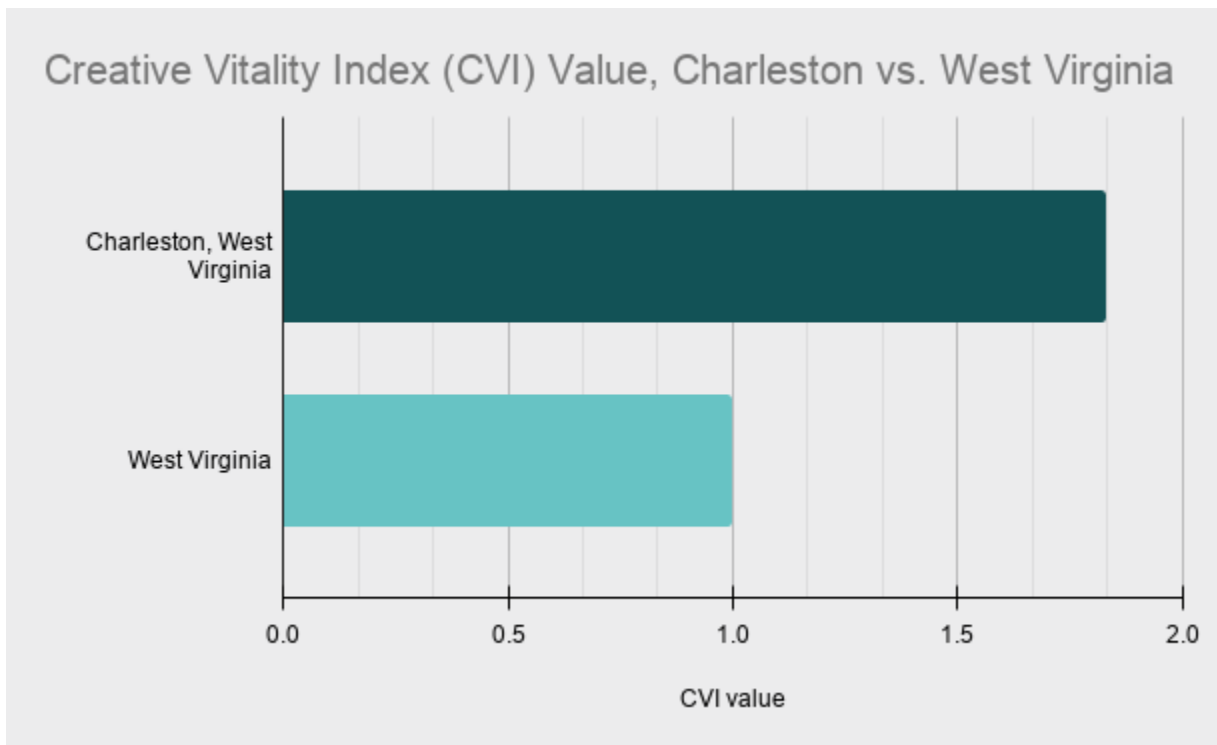


Figure 19. Creative Vitality Index Value, Charleston vs. West Virginia (2011-2018), CVSuite, 2020



Live audience at Mountain Stage. Photo by Josh Saul/Mountain Stage

Mountain Stage is part of that success. According to Mountain Stage and state tourism research, "More than 13,000 people attended a Mountain Stage concert in West Virginia last year, leading to more than \$1 million in direct economic impact."¹⁵¹ Mountain Stage receives much of its funding from memberships, sponsorships and contributions in addition to ticket sales. This collaborative blend of private, public and earned support was fortuitous when Mountain Stage saw the loss of admissions revenue after performing venues were shut down due to COVID-19. Not relying exclusively on ticket sales has helped Mountain Stage weather that storm and also gives it the freedom to feature and boost the visibility of emerging local artists who may not yet have the fame required to book a live show at a large venue. Continuing to cultivate local music talent is critical given the challenges to live music posed by the pandemic, and supporting music is a means by which many communities are developing their creative economies and contributing to the type of community vibrancy that attracts and retains talent.¹⁵²

Even though leisure and recreation have been adversely affected by the pandemic, there are signs that tourism continues to be popular and that the state is able to attract workers and businesses during this time.¹⁵³ The music industry, which had drawn tourists and stimulated economic activity through shows at popular venues and festivals, is suffering given pandemic restrictions, but is pivoting to online formats.¹⁵⁴ Governor Justice relaxed some of the restrictions on outdoor and indoor music performances in October 2020 to expand the opportunities for musicians and their audiences.¹⁵⁵ And the demand for music remains strong. Mountain Stage's reach has increased during the pandemic in ways that depart significantly from national trends in radio programming: listenership in 2020 grew by 24% over 2019 figures and the number of stations carrying the program grew by 9%.¹⁵⁶ As the crown jewel of Charleston and the state of West Virginia's music scene, Mountain Stage seems poised to maintain its relevance and grow further as the state's music industry adapts to a new environment.

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About NASAA

The mission of the National Assembly of State Arts Agencies (NASAA) is to strengthen state arts agencies. NASAA is the professional association of the nation's 56 state and jurisdictional arts agencies and a national, not-for-profit, nonpartisan organization that champions public support for the arts in America. Together, NASAA and the state arts agencies advance the arts as an essential ingredient in the well-being and prosperity of our nation's individuals, communities and families.

About WESTAF and the Creative Vitality Suite

The Creative Vitality Suite, a creative economy data and reporting tool used extensively in this project, was designed and developed by the Western States Arts Federation (WESTAF), a regional nonprofit arts service organization, experienced research organization and developer of technology solutions for the arts. WESTAF is dedicated to strengthening the financial, organizational and policy infrastructure of the arts in the West. Through innovative programming, advocacy, research, technology and grant making, WESTAF encourages the creative advancement and preservation of the arts regionally and through a national network of customers and alliances. WESTAF serves the largest constituent territory of the six U.S. regional arts organizations, including Alaska, Arizona, California, Colorado, Hawai'i, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington and Wyoming.

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