



DEKALB

Film, Music and Digital Entertainment Strategic Plan

DeKalb Entertainment Commission, Decide DeKalb Development Authority

JULY 2023

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Forewords

Decide DeKalb Development Authority

On behalf of the Decide DeKalb Development Authority and our Board of Directors, I'm pleased to share the five-year strategic plan for DeKalb County's Entertainment Commission. As Georgia's film and production industry continues to be an important economic driver for the State, Decide DeKalb is working to ensure DeKalb County's contribution remains strong and poised for even further growth.

The last five years saw DeKalb transition into a major entertainment hub that has spurred major economic growth. This was a direct result of the DeKalb Entertainment Commission promoting DeKalb's film-ready sites and diverse landscapes, improving permitting and licensing processes, and aligning industry growth opportunities through a deliberate and strategic approach.

The capital investment of large studio space in DeKalb shows the industry's confidence as well as the County's commitment to bringing film development to the area. We are excited to see the revitalization these developments will bring and anticipate increased economic benefits including quality job opportunities.

In terms of numbers, a report generated by the Atlanta Regional Commission (ARC) forecasts a growing and thriving film and television industry in DeKalb County. The economic analysis and industry-specific report leverages data obtained from 2018 and projects the booming industry's trajectory as it relates to job opportunities, economic impact, and other key metrics. The five-year snapshot highlights \$1.377 billion in economic output from television productions exclusively.

The attached five-year strategic plan acts as a guiding principle and includes short- and long-term goals and recommendations. The plan serves as a foundation to help us continue to attract major productions that will ensure DeKalb retains its economic strength and growth, while providing job opportunities for our residents for years to come.

Dorian DeBarr, President, Decide DeKalb Development Authority

DeKalb Entertainment Commission

During my time leading the DeKalb Entertainment Commission, I have witnessed the incredible growth of the entertainment industry in the State of Georgia. It has transformed communities, specifically DeKalb County, through direct and indirect economic impact.

Since the Commission was created in 2016, the three main goals have been: intentional growth, focused investment, and quality jobs in the Entertainment Industry. Over the last five years, we have processed film permits for production companies that have filmed movies, television shows and commercials in DeKalb and have generated film permit revenue. The entertainment industry is a booming ecosystem that contributes to the business health and prosperity of DeKalb, including job creation and growth.

As a key player in Georgia's entertainment industry, the DeKalb Entertainment Commission will continue to thrive and lead in this incredibly vital and important economic space by connecting partners with resources through what we excel at: Film Permitting and Location Assistance.

This new strategic plan will serve as a guide to narrow our focus on important initiatives that will allow us to continue to grow. We will continue to leverage the attraction of Georgia's Film Tax Credit by establishing a collaborative, supportive infrastructure across all 13 cities and unincorporated communities to promote DeKalb's vast number of unique locations.

I'd like to thank our partners who helped put this strategic plan together and who worked to identify growth areas to prioritize, including but not limited to: Sound Diplomacy Team, DeKalb Entertainment Commission, Decide DeKalb Development Authority's Board Members, DeKalb County Government and other stakeholders who are invested in the future of the County.

We look forward to advancing the implementation of this strategy that continues to support our thriving film and entertainment industry.

Shelbia Jackson, Director, DeKalb Entertainment Commission

DeKalb Entertainment Commission

The amazing growth of DeKalb's entertainment industries over the last five years demonstrate how the County's residents value creativity, hard work and entrepreneurship. The DeKalb Entertainment Commission, under the inspired leadership of the Commission's Director, Shelbia Jackson, has been instrumental in supporting their efforts in film, music and digital entertainment. Now we have the chance to create even more phenomenal opportunities for DeKalb County residents. The initiatives that are outlined in this strategic plan will ensure that DeKalb is known not only as the film studio capital of Georgia but will also be a preferred location for all entertainment sectors.

Thank you for taking the time to review this plan that identifies growth areas within the entertainment pipeline and ensures that we have a blueprint for continued positive engagement with the entertainment industry. The DeKalb Entertainment Commission looks forward to working with our partners to ensure that each of these goals and recommendations becomes a reality.

Andrew Greenberg, Chairman, DeKalb Entertainment Commission

Sound Diplomacy

DeKalb County has long served as a model, both regionally and nationally, for how to develop policies and practices to best support and cultivate entertainment businesses in all shapes and sizes, forms and functions. DeKalb is a thriving entertainment ecosystem, and this did not happen by chance. From world class film locations to soundstages, music venues, touring operations, and generous tax incentives, the County has taken the entertainment business seriously and because of it, benefitted from its potential. This is what makes DeKalb one of the most exciting counties in terms of its strategies to grow entertainment as a core industry.

It has been a joy to partner with the DeKalb Entertainment Commission (DEC) and Decide DeKalb to create a blueprint to continue to develop into an even more exceptional community whose reach far exceeds that of other comparable locations. It is our hope that this report and the actions therein will guide DeKalb throughout the next five years, most importantly in leveraging and utilizing the incredible local talent in-house, while ensuring the message and offer to investors, large and small, is as robust as what is happening on the ground now. It has been a pleasure to deliver this report because in many ways, DeKalb County has already set the standard. But there is more to come and more to laud, lead and benefit from. It is this new higher standard that this report proposes, one we are sure will be set over the next five years

and beyond and with it, increased investment, recognition, job creation and an improved quality of life, in DeKalb as a whole.

Shain Shapiro, Founder and Chairman, Sound Diplomacy

1. About The Project

In 2021 Sound Diplomacy, in collaboration with the DeKalb Entertainment Commission (DEC) and Decide DeKalb, began a five-year strategic plan to support the development of a more impactful film, music, and digital entertainment industry. The objectives of this project were to:

- Create an equitable and inclusive environment to stimulate DeKalb's entertainment sectors;
- Provide clear metrics to measure expansion of direct and indirect industry job growth;
- Identify measurements to track development of local industry infrastructure; and
- Conduct market and industry cluster analysis to identify those portions of the entertainment industry where DeKalb has a competitive advantage.

Working with the DEC and Decide DeKalb, growth areas were identified and actionable strategies and implementation plans have been produced to deliver measurable economic and social benefits. Throughout a comprehensive engagement process, the attractiveness of DeKalb's entertainment sectors and the broad-reaching talent and diversity was undeniable, revealing many areas of best practice in the County, such as music and digital entertainment education and film production permitting, from which other counties in the United States and internationally could learn from. With the film, music and digital entertainment sectors generating a total GVA of \$7.34 billion, supporting 13,852 direct jobs, establishing 1,752 physical assets, and creating an indirect and induced effect of \$477.94 for every \$1,000 of output generated, the numbers alone shine a light on the significance and importance of these industries in DeKalb.

To reach its full potential, a collaborative ethos must be built and cultivated throughout the film, music, and digital entertainment sectors that puts equal emphasis on the unique contributions of each sector. In doing so, DeKalb will attract new and existing businesses and audiences, while continuing to foster the development of local talent and professionals.

DeKalb Entertainment Commission¹

The DeKalb Entertainment Commission serves the 13 cities and 20 unincorporated communities that make up DeKalb County in Georgia. With the goal of advancing, strengthening, and supporting the entertainment industry, the Commission offers businesses access to collaborative, supportive infrastructure which stimulates the growth of DeKalb's film, television, music, and digital entertainment sectors.

Decide DeKalb Development Authority²

Decide DeKalb is the driving force behind DeKalb's provision of economic development support, offering services such as: site selection and expansion for new businesses, local business resources, talent and workforce development, and a down payment assistance program. The DeKalb Entertainment Commission works in collaboration with Decide DeKalb. Additionally, Advance DeKalb, another division of Decide DeKalb, is 501(c)3 non-profit organization committed to furthering the economic strength of DeKalb County, retention and redevelopment through an invigorating combination of investment, training, and educational initiatives.

1.1 About Sound Diplomacy

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

1.2 Commitment to Sustainable Development Goals

In 2015, through the United Nations, world leaders agreed to the Sustainable Development Goals (SDGs), 17 commitments and 169 targets with the aim of building a better world by

¹ DeKalb Entertainment Commission (2022)

² Decide DeKalb (n.d.)

2030. These goals have the power to end poverty, fight inequality and address the urgency of climate change. Guided by these goals, it is now up to governments, businesses, civil society and the general public to work together to build a better future for everyone.³



Sound Diplomacy’s work mirrors DeKalb’s commitment to the SDGs and aims to communicate through the universal language of sustainability and development. With member countries ratifying the UN’s SDGs, a code and framework to guide sustainable development has been established to influence development arrangements and contractual obligations of donors and grantees. While culture is not explicitly mentioned in the SDGs, it is viewed as a key element of all SDGs. The UN has conducted research to better understand the role culture can play in meeting sustainable development goals. The United Cities and Local Governments’ *Culture in the SDGs*,⁴ is one example, and provides guidance for this report.

2. Methodology Summary

Market Cluster and Business Practice Analysis: Work involved an analysis of local and national literature and policies relevant to the film, music and digital entertainment industries

³ Global Goals (n.d.)

⁴ United Cities and Local Governments (2018)

in DeKalb, an assessment of the direct, indirect and induced economic value of the film, music and digital entertainment industries in DeKalb, and a mapping that identified the film, music and digital entertainment-related assets in DeKalb County. The geographical area includes five Districts in which **1,752** assets were mapped.

Stakeholder Engagement: Over the course of two months, Sound Diplomacy conducted seven roundtables, and three one-on-one interviews with stakeholders of the DeKalb film, music and digital entertainment industries. The key findings for stakeholder engagement can be found in Appendix 4.

Comparative Analysis and SWOT Analysis: Work involved the analysis of each city that forms DeKalb County, looking specifically at the regulatory and policy system and how each compares to one another. This informed (with the mapping, literature review, regulatory assessment, economic impact and stakeholder engagement) the SWOT analysis to identify all strengths, weaknesses, potential opportunities for, and threats to the film, music and digital entertainment ecosystems in DeKalb County.

Five-Year Strategy and Implementation Plan: Following all desk research and stakeholder conversations, a set of 11 actionable recommendations with estimated budgets and implementation plans have been created for DeKalb to take forward.

For a detailed explanation of all methodologies, please refer to the end of the report.

3. Market Cluster and Business Practice Analysis

3.1 DeKalb at a Glance

Table 1. DeKalb County Statistics

Population (DeKalb County): 757,718 ⁵	
Median Age: 35.8 ⁶	Sex percentage: 52.8% female / 47.2% male ⁷

⁵ United States Census Bureau (2021)

⁶ Data Commons (n.d.)

⁷ United States Census Bureau (2021)

Per Capita Income: \$37,523

Median Household Income: \$65,116

Unemployment: 3.7⁸

Persons with a High School Diploma or Higher: 90.3%⁹

Ethnicity: 54.8% Black, 35.9% White, 8.5% Hispanic or Latino, 6.5% Asian, 0.5% American Indian or Alaska Native¹⁰

Persons with a Bachelor's Degree or Higher: 45.6%¹¹

Households with a Broadband Internet Subscription: 87.9%¹² Cost of Living index: 97.8¹³

DeKalb County in north central Georgia, is the fourth most populous county in the state. Over 64 languages are spoken across the communities, and it is home to many attractions and activities, from cultural and gastronomic festivals, to historic and modern architecture and nature trails in Stone Mountain Park. Education is significant to DeKalb, with 145 schools and educational centers and over 40% of residents over the age of 25 holding a Bachelor's Degree.¹⁴

Business development and retention is a major strategic focus of DeKalb County. Across the 13 cities, there are 88 internationally based companies and 17.7 thousand employers. Emory University and Intercontinental Hotels Group are two of the largest employers in the region.¹⁵

3.2 Regulatory Assessment

3.2.1 DeKalb County Regulation and Policy Snapshot

⁸ Data Commons (n.d.)

⁹ Ibid.

¹⁰ United States Census Bureau (2021)

¹¹ Ibid.

¹² Ibid.

¹³ Ibid.

¹⁴ Decide DeKalb (n.d)

¹⁵ Ibid.

The following table provides an overview of the most relevant regulations and policies to the film, music and digital entertainment industries in DeKalb County. For a detailed review of all relevant regulations turn to **Appendix 1**.

Table 2. DeKalb County at a Glance

TOPIC	POLICY	BEST CASE
<p>Entertainment Education</p> <p>In Place? YES</p>	<p>Music education is provided by the DeKalb County School District. The dedicated Music Department provides the service to all schools in the county and has previously been praised as one of the top 100 in the country for quality of music education by the National Association of Music Merchants.</p> <p>Digital independence is encouraged within the school system in DeKalb. The Digital Dreamers initiative aims at providing students with the tools, knowledge and encouragement to govern interest in technology and innovation and embed it into their day to day life, not just for career development.¹⁶</p> <p>DeKalb County schools and centers have access to the Audio/Video Technology and Film Pathway during high school education.¹⁷</p> <p>There are multiple options for tertiary education in the County including at Agnes Scott</p>	<p>The quality of music education combined with opportunities for digital and film education make DeKalb a case study in and of itself. There are further opportunities for collaboration across these sectors in order to further strengthen the industry.</p> <p>In order to continue to improve education in these sectors, the County could promote an integrated entertainment education initiative, similar to Nashville's Music Makes Us initiative.¹⁸</p> <p>The Music Makes Us initiative is a public/private partnership with Metro Nashville Public Schools, the Mayor's Office and the Nashville music community. The program's main goal is to eliminate barriers to music education and increase student participation while adding a contemporary curriculum that embraces new technologies and reflects the diverse student population. In addition to school music programs, the initiative has an online hub of professional artists and organizations that acts as a marketplace for students and teachers in the Metro Nashville Schools. Artists</p>

¹⁶ DeKalb County School District (n.d.a)

¹⁷ DeKalb County School District (n.d.b)

¹⁸ Music Makes Us (2019)

	College, Clayton State University, Georgia State University, and Emory College of Arts and Sciences to name a few.	and professionals can publish their courses to the platform, providing details on the program, populations and fees, as well as contact information.
TOPIC	POLICY	BEST CASE
<p>Funding Support</p> <p>In Place? YES</p>	<p>DeKalb County is a prime destination for the film, music, and digital entertainment industry largely due to the State of Georgia's tax incentive programs for each. These programs include the Georgia Entertainment Industry Investment Act, the Georgia Music Investment Act, and the Georgia Interactive Tax Credit.</p> <p>DeKalb County is in the process of creating a small business funding programme.</p>	<p>DeKalb County could benefit from more small to mid-scale funding opportunities for up and coming filmmakers and entertainment professionals in the area. The Tennessee Entertainment Commission has incentive programs with lower barriers to entry, which are accessible to smaller-mid-sized businesses. Additionally, the FastTrack Job Assistance Program and Economic Development Program offers unique resources for businesses of all sizes that plan on expanding their infrastructure and employment.¹⁹</p>
<p>Liquor Licensing</p> <p>In Place? YES</p>	<p>Liquor licenses are managed and processed by DeKalb County's Department of Finance. While some forms are available on their website, links to the "License Application" and "License Check-off List" on the Finance Department's website are frozen or inoperable.²⁰</p>	<p>The Department of Liquor and Lottery, Division of Liquor Control (DLC) in Vermont has on its website a plain-language guide and description of the liquor licenses available for applicants, including the necessary steps to obtain one.²¹</p>
<p>Event Permitting</p> <p>In Place? YES</p>	<p>Special event permits are handled by DeKalb County's Department of Recreation, Parks, and Cultural Affairs. Applications must be submitted</p>	<p>DeKalb County's special event applications are currently available online, but must be submitted to the Recreation Department. Developing a handbook for special events, similar to the one created by Seattle Washington's Special Events Office,</p>

¹⁹ Tennessee Entertainment Commission (2019)

²⁰ DeKalb County (2019a)

²¹ Vermont Division of Liquor Control (2019)

	30 days prior to the event in order to be considered. ²²	could help communicate guidelines and considerations to interested persons. ²³
TOPIC	POLICY	BEST CASE
<p>Film Production Permitting</p> <p>In Place? YES</p>	<p>DeKalb County consists of 13 cities as well as a large amount of unincorporated areas. While most of the cities have their own permitting requirements, in order for production to take place in unincorporated areas, whether on public or private property, the organizers must be granted a film permit from DeKalb County.</p>	<p>DeKalb's film permitting process is streamlined in its approach, with the majority of cities having online application portals and materials through the FilmApp portal. DeKalb County also has its own FilmApp for permits in unincorporated areas and the DeKalb Entertainment Commission has an interactive jurisdictional map to help scouts find resources for their projects.</p> <p>New Orleans OneStop app for permitting allows citizens to apply, track, and search for permits, licenses, planning projects, and violations throughout the City of New Orleans.²⁴</p>
<p>Noise Ordinance</p> <p>In Place? YES</p>	<p>Chapter 27-762 of DeKalb County's Code of Ordinances describes stipulations on noise in residences, industrial, commercial, and mixed-use areas.²⁵</p> <p>Special administrative permits, which provide relief from the stipulations of the noise ordinance for a short period of time, are issued by DeKalb County's sound control administrator. The period of time granted for noise ordinance</p>	<p>Asheville, North Carolina's Sound Exceedance Permit institutes a tiered approach where applicants can apply for a level one permit which would allow for one to two sound exceedance events per year, while a level three permit would allow for nine to thirty events per year.²⁶ The level three permits are reserved for music venues and performing arts spaces.</p>

²² DeKalb County (2019c)

²³ Seattle Special Events Office (2019a)

²⁴ City of New Orleans (2022b)

²⁵ DeKalb County (2010)

²⁶ City of Asheville (2021a)

	exceptions granted by Special Administrative Permits cannot exceed more than 15 days per year.	
TOPIC	POLICY	BEST CASE
<p>Health and Safety Regulations</p> <p>In Place? YES</p>	<p>The State of Georgia has a “Film and Television Production Best Practices to Reduce Contagion of COVID-19.”²⁷</p>	<p>While the State of Georgia’s Best Practices Guide is a best case in and of itself, it is not listed on the DeKalb County Board of Health Website or the DeKalb Entertainment Commission’s website.</p> <p>Des Moines, Iowa’s “Mask Up DSM” initiative includes “Industry Forward Playbooks,” which provide sector specific guidance on how to safely operate businesses and organizations; there is a playbook for their Events, Arts, and Culture sectors as well. This playbook is posted across several city and county websites.²⁸</p>
<p>Environmental Sustainability and Recycling</p> <p>In Place? NO</p>	<p>There is no specific recycling guidance for the entertainment industry on the DeKalb County Sanitation Department website.</p>	<p>Melbourne, Australia’s Planning and Environment Act encourages decision makers to consider the environmental impact of proposed development projects. Environmental considerations include music noise and the social and economic benefits of live music and cultural events.²⁹</p>
<p>Busking</p> <p>In Place? Not County-wide</p>	<p>While there does not appear to be a county wide busking policy, the City of Decatur has made headlines for its Busking Program.³⁰</p>	<p>The Asheville Busking Guide was created by the Asheville Buskers Collective to provide buskers and potential buskers with the dos and don'ts of the practice. It includes</p>

²⁷ Georgia Department of Economic Development (2022a)

²⁸ Greater Des Moines Partnership (2022)

²⁹ City of Victoria (2003)

³⁰ Decatur Arts Alliance (2022)

		specific definitions for noise disturbances and city rules and laws. ³¹
TOPIC	POLICY	BEST CASE
<p>Audience Development</p> <p>In Place? YES</p>	<p>The DeKalb County School District has a film festival which highlights films that focus on the state of education; the films are followed by community discussions regarding challenges confronting the education system.³²</p>	<p>Night Out³³ is an Arts Council of Wales (ACW) initiative that helps local organizations to bring professional performances into community buildings at subsidized prices. This initiative helps hundreds of community groups across Wales to bring the arts to the heart of their communities by selecting and hosting professional performing arts events in non-traditional smaller scale venues (mostly village halls and community centers).</p>
<p>Film and Entertainment Office</p> <p>In Place? YES</p>	<p>The DeKalb Entertainment Commission (DEC) provides DeKalb County's entertainment industry, particularly the film, music, and digital entertainment sectors, with the infrastructure to support its constantly expanding entertainment industry.³⁴</p>	<p>In addition to promoting economic development through the expansion of the creative sector, New York City's Mayor's Office of Media and Entertainment (MOME) has launched a number of groundbreaking initiatives to promote both diversity and equality in the entertainment fields, including New York Music Month, MOME's Women's Fund and the 'Made in NY' Awards.³⁵</p>

³¹ Asheville Buskers Collective (2019)

³² DeKalb County Board of Education (2021)

³³ Arts Council of Wales (2018a)

³⁴ DeKalb Entertainment Commission (2018a)

³⁵ NYC Media & Entertainment Office (2019)

TOPIC	POLICY	BEST CASE
<p>Zoning Districts</p> <p>In Place? YES</p>	<p>There are multiple cities in DeKalb County including Dunwoody, Tucker, and Decatur that have open-container policies, which allow for patrons to leave restaurants and bars with alcoholic beverages in commercial districts. However, this is the only relevant district-specific policy that could be determined.³⁶</p>	<p>Austin has six official entertainment districts, each with a distinct aesthetic and offering. Downtown Austin is the main commercial area, divided into three sub-areas (2nd Street, Warehouse District and West Sixth Street) and concentrating a higher profile of entertainment and dining options compared to the rest of the districts. East Austin is the fastest growing neighborhood, famous for its eclectic and alternative offering of entertainment, food options and bars.³⁷</p>
<p>Agent of Change</p> <p>In Place? NO</p>	<p>DeKalb County does not currently have an Agent of Change Policy in place. The Agent of Change With respect to noise, the principle holds the entity that creates a change in an area responsible for mitigating the impact of noise related activities of the change on that area.</p>	<p>San Francisco Mayor London Breed's amendment to Chapter 116 of the local ordinances states existing venues, so long as they are in keeping with existing noise laws, are protected from the complaints of any new residences, hotels or motels built nearby.³⁸</p>
<p>Parking Regulations</p> <p>In Place? NO</p>	<p>There are no county-wide policies or incentives for entertainment-related parking measures in place.</p>	<p>In Nashville a deal was brokered between Premier Parking and the local musicians' union, in which special \$5 nightly rates are offered to musicians.</p> <p>Additionally, the Renaissance Hotel in the city center offers \$9 valet parking services for musicians.</p>

³⁶ Zachary Hansen (2021b)

³⁷ Visit Austin (2019)

³⁸ City and County of San Francisco (2015)

		Parking vouchers for the hotel are distributed to local music venues to give musicians access to lower prices. ³⁹
TOPIC	POLICY	BEST CASE
Transit In Place? YES	Many cities in DeKalb County are serviced by the Metropolitan Atlanta Rapid Transit Authority (MARTA). Between MARTA's trains, buses, and paratransit vehicles, the system provides around 42,000 passenger trips across Fulton and DeKalb counties every weekday. MARTA fare is \$2.50 per one-way trip.	Toronto's Blue Night Network is the most extensive nighttime transportation service in North America, with routes picking up after trains cease service between 1am-2am. Routes run approximately every 30 minutes until morning service resumes, and are spaced in order to keep 99% of the city within a 15 minute walk of a stop. ⁴⁰ The network consists of buses, trains, and streetcars.

3.3 Economic Impact Assessment

3.3.1 Definition of the Film, Music and Digital Entertainment sectors

Film, music and digital entertainment belong to the Creative and Cultural Industries. The United Nations Educational, Scientific and Cultural Organization's (UNESCO) Framework for Cultural Statistics defines the cultural and creative industries as "those sectors of organized activity that have as their main objective the production or reproduction, the promotion, distribution or commercialization of goods, services and activities of content derived from cultural, artistic or heritage origins".⁴¹

Cultural and creative sectors are inherently part of every cities' ecosystem. Like in nature, this ecosystem is formed by a group of stakeholders, a set of resources, and an environment where they develop their activities and connect with each other and with other ecosystems. Like in all ecosystems, these relationships are interdependent. Some stakeholders exist simply because others exist and because there is a sustainable environment that favors their

³⁹ Premier Parking (2017)

⁴⁰ Stefan Novakovic (2017)

⁴¹ UNESCO (n.d.)

survival. In the case of cultural and creative sectors, the agents are responsible for everything, starting with the creations going all the way to the audience or consumers. Some of its elements within the cultural and creative industries ecosystem are musicians, film and audiovisual producers, music venues, broadcast businesses or record labels, IT suppliers, designers, and web developers.

The economy of the cultural and creative industries seeks to explain the music sector's phenomena by using economic and statistical tools, with the fundamental purpose of providing insight into public policy and private decision-making. The creative and cultural economy is not only limited to understanding the transactions of goods and services in the market, but it can also become a useful tool to understand the dynamics of non-monetary resources existing within the cultural and creative ecosystem.

This analysis considers three sectors, taking into account the nature of the activities and their timeframe:

- **Film Industry:** film production, film post-production, film distribution, film exhibition, film supplies & TV/internet broadcasting, media advertising, reproduction, equipment, food and services contractors.
- **Music Sector:** live music & touring (venues, promoters, agents), recording & publishing, radio broadcast, instruments and equipment, music education, other professional support (music marketing, PR, etc).
- **Digital Entertainment:** digital design, programming, and publishing (graphic designers, software publishers, computer programmers, etc), digital hosting and broadcasting (data processing, internet publishing, and broadcasting, etc).

3.3.2 Economic Impact - Summary

The three sectors analyzed in this document – ‘Film Industry’, ‘Music Sector’, and ‘Digital Entertainment’ – delivered a total economic impact⁴² of 26,858 jobs, a total output of \$11.4 billion and a total gross value added (GVA) of \$7.34 billion.

Table 3. Direct, Indirect, Induced and Total Economic Impact

TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	OUTPUT MILLION \$	GROSS VALUE ADDED MILLION \$
Direct	13,852	7,720	5,033

⁴² For definitions, refer to the Economic Impact Methodology below

Indirect	8,057	2,454	1,569
Induced	4,949	1,235	747
Total Impact	26,858	11,409	7,349

When focusing on the direct economic impact, the three sectors generated 13,852 direct jobs, \$7.72 billion in direct economic output, and \$5.03 billion in GVA in 2019. The majority of the direct economic value of the sector is created by the Digital Entertainment sector (64%), whilst the Film and Music sectors generate 21% and 15% respectively.

For every \$1,000 of output generated by the three sectors studied, there is an indirect and induced effect of \$477.94.

3.3.3 DeKalb County Economic Film, Music and Digital Entertainment Impact

Figure 1 summarizes the economic impact (direct, indirect, and induced) of the Film, Music, and Digital Entertainment sectors in DeKalb County for 2019. It generated and supported a total of 26,858 jobs (6.8% of the local employment). The total output generated was \$11.41 billion and a total GVA was \$7.35 billion.

Figure 1. DeKalb County Digital Entertainment, Film and Music Sectors Economic Impact, Output, and Employment 2019



Developed by: Sound Diplomacy

Source: County Business Patterns 2019, BEA RIMS II, Sound Diplomacy Research

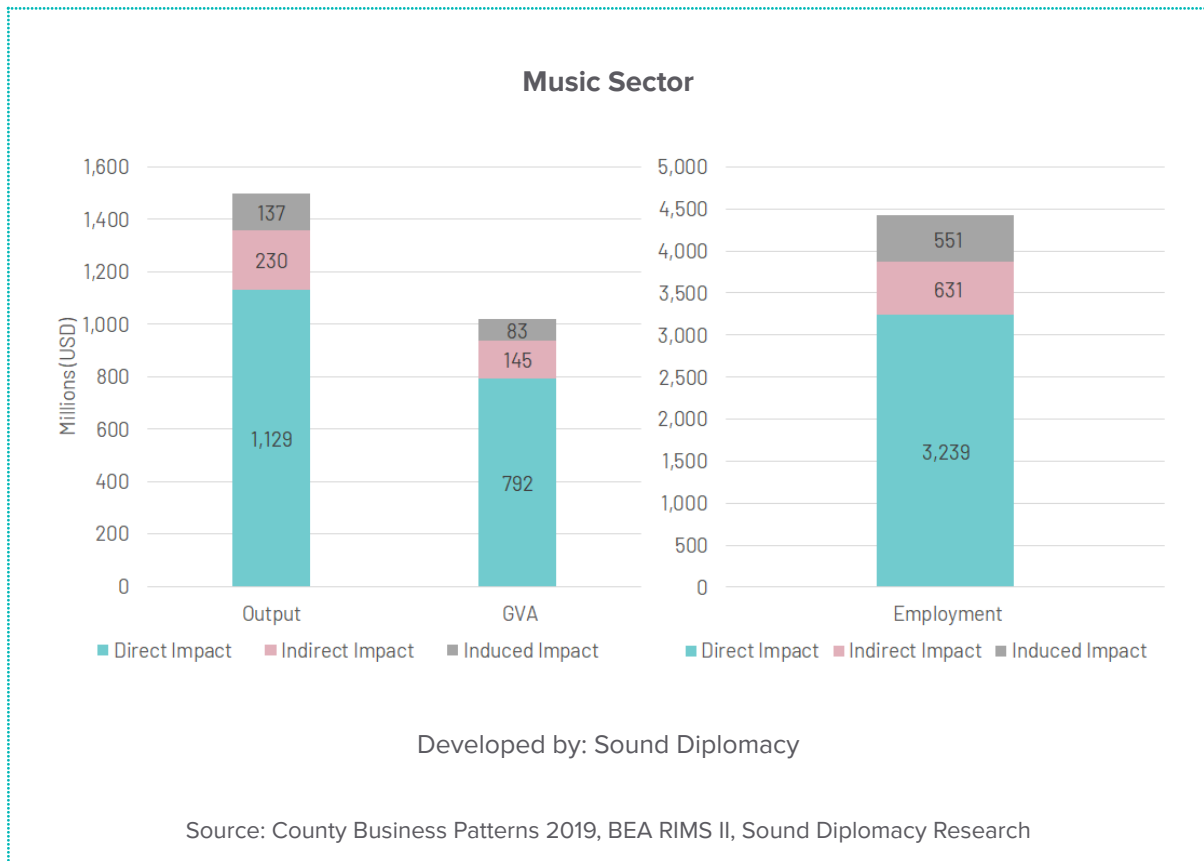
Breaking down the effects of each of the sectors studied, we found that the Digital Entertainment sector generated and supported a total of 17,475 jobs (4.4% of total local employment), produced a total output of \$7.50 billion, and a total GVA of \$4.91 billion.

Likewise, the Film sector generated and supported a total of 4,961 jobs (1.3% of total local employment), produced a total output of \$2.41 billion, and a total GVA of \$1.42 billion.

Finally, the Music sector generated and supported a total of 4,421 jobs (1.1% of total local employment), produced a total output of \$1.49 billion, and a total GVA of \$1.02 billion (see Figure 2).

Figure 2. DeKalb County Film, Music and Digital Entertainment Economic Impact, Output, and Employment 2019 breakdown





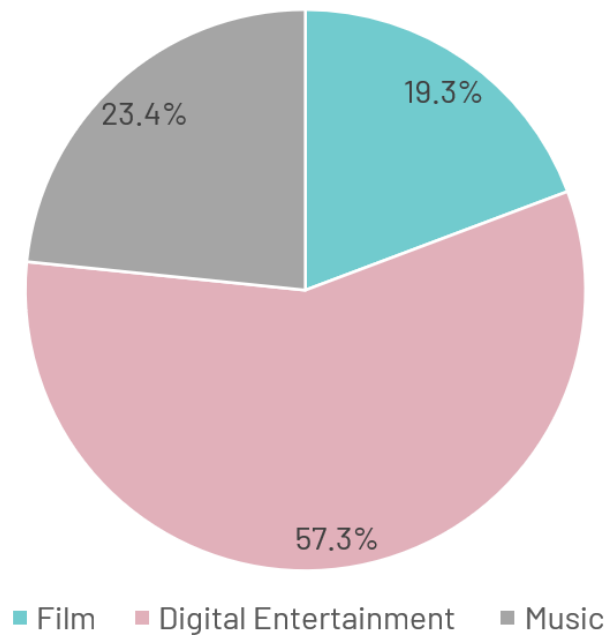
The following sections give an overview of the direct, indirect, and induced impact of the DeKalb County Film, Music and Digital Entertainment sectors.

Direct Impact

The direct impact reflects the economic value created directly by the activities of the Film, Music, and Digital Entertainment sectors. These sectors produced a direct output of \$7.72 billion, an estimated GVA of \$5.03 billion and it was responsible for 13,852 direct jobs.

The economic activities related to the Digital Entertainment sector represented 57.3% (7,942 jobs) of the three studied sectors, while Music and Film sectors comprised 23.4% (3,239 jobs) and 19.3% (2,671 jobs) (see Figure 3). Similarly, the contribution of Digital Entertainment to the three studied sectors' output in the County is 64% (\$4.98 billion), while Film and Music sectors generate 21% (\$1.62 billion) and 15% (\$1.13 billion) of the direct economic output, respectively.

Figure 3. DeKalb County Direct Employment by Sector, 2019



Developed by: Sound Diplomacy

Source: County Business Patterns 2019, BEA RIMS II, Sound Diplomacy Research

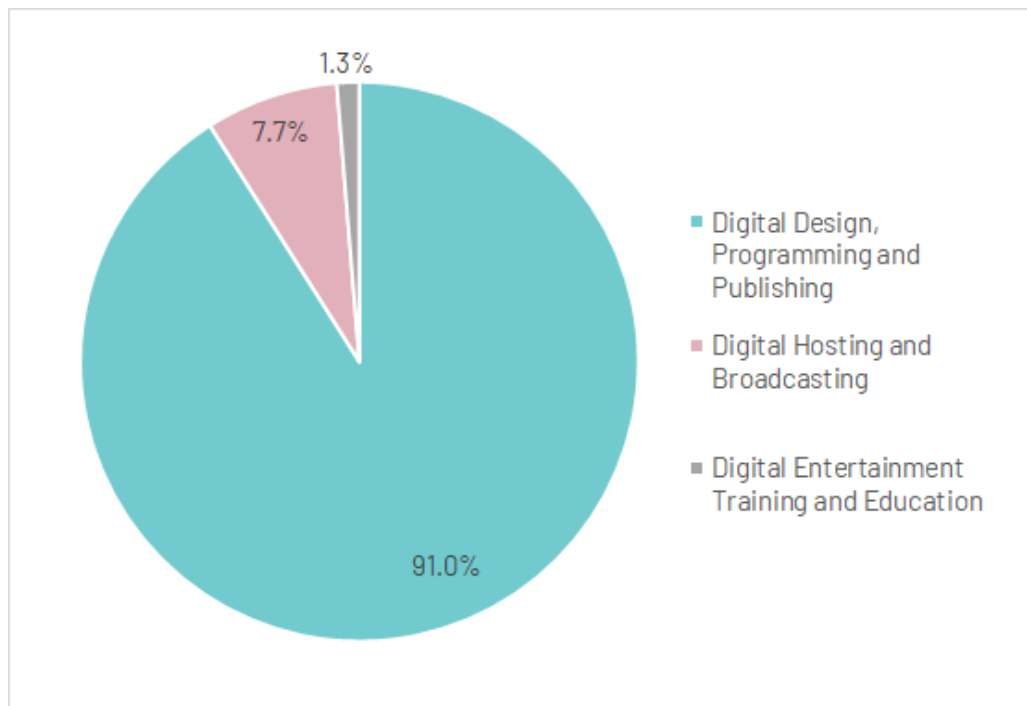
When assessing employment figures for each sector, it was revealed that in the case of Digital Entertainment, the highest share of employment corresponds to Digital Design, Programming and Publishing activities⁴³ making up 91% (7,228 jobs) of jobs, followed by Digital Hosting & Broadcasting⁴⁴ with 7.7% (608 jobs), and Digital Entertainment Training and Education⁴⁵ with 1.3% (105 jobs) (see Figure 4).

⁴³ Digital Design, Programming, and Publishing includes: Software Publishers, Graphic Design Services, Custom Computer Programming services, and Marketing consulting services.

⁴⁴ Digital Hosting & Broadcasting Includes: Data processing, Hosting and Related Services, Internet Publishing and Broadcasting and Web Search Portals, and All Other Information Services.

⁴⁵ Digital Entertainment Training and Education includes: Junior Colleges (with digital programs), and Computer and Training.

Figure 4. Digital Entertainment Sector Direct Employment Share



Developed by: Sound Diplomacy

Source: County Business Patterns 2019, BEA RIMS II, Sound Diplomacy Research

Within the Film sector, the highest contribution of jobs to the sector is created by Film Production and Post-Production,⁴⁶ generating 29.5% (788) of the jobs within the sector. The second is Audiovisual Production and Broadcasting,⁴⁷ with 19.1% (509 jobs), followed by Other Supporting Activities,⁴⁸ with 14.9% (398 jobs), Film Exhibition,⁴⁹ with 11.1% (296 jobs), and Audiovisual Production Suppliers,⁵⁰ with 10.5% (281 jobs). The rest of the jobs generated by the Film sector in DeKalb County are distributed across Audiovisual Advertising⁵¹ with 225

⁴⁶ Film Production and Post-production includes: Motion Picture & Video Production, and Teleproduction & Other Post-Production Services.

⁴⁷ Audiovisual Production and Broadcasting: Internet Publishing and Broadcasting Web Search Portals, Television Broadcasting, and Cable & Other Subscription Programming.

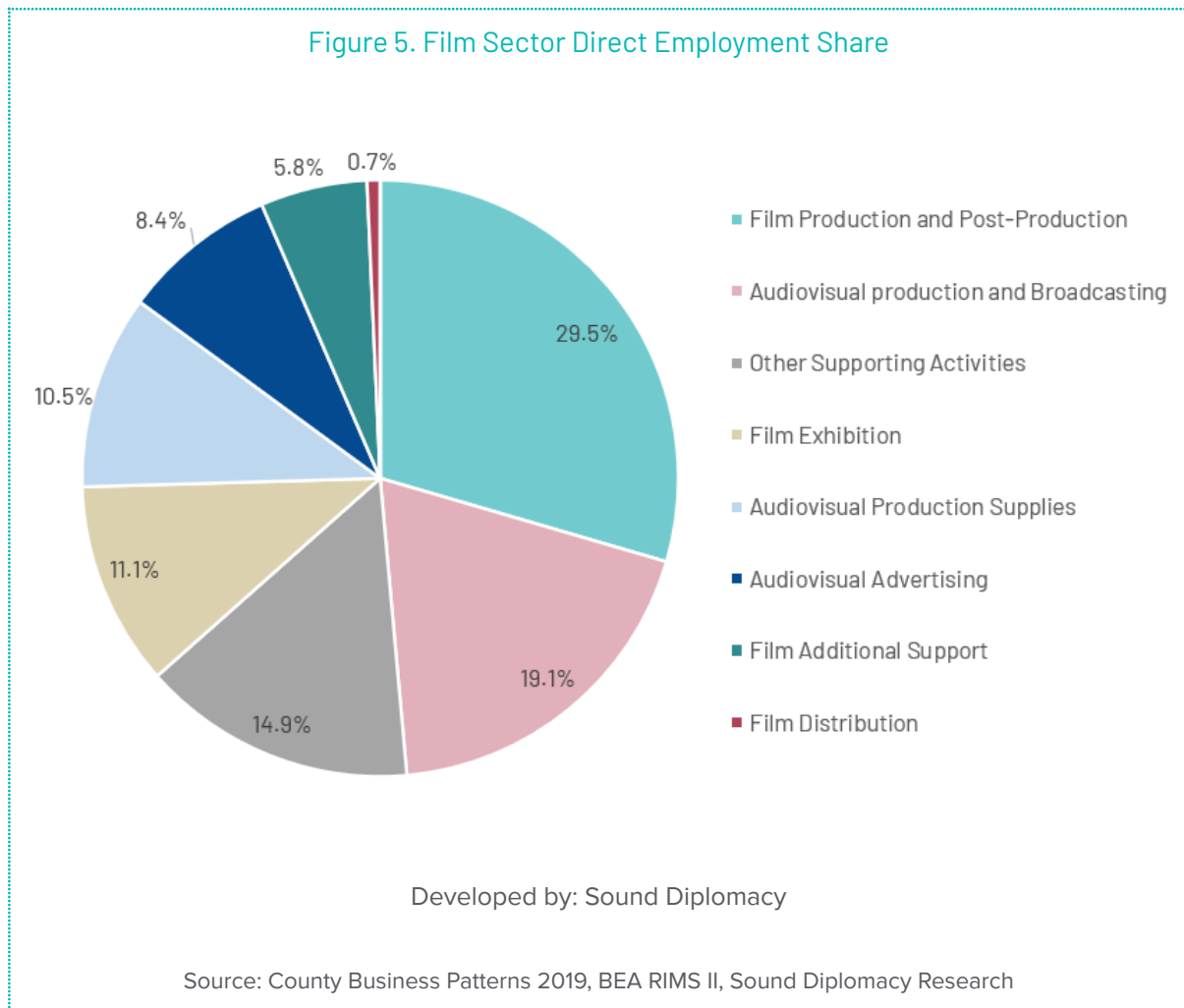
⁴⁸ Other Supporting Activities include: Consumer goods Rentals, Food Services Contractors, and Caterers.

⁴⁹ Film Exhibition includes: Motion Picture Theaters, and Drive-In Motion Picture Theaters.

⁵⁰ Audiovisual Production Suppliers includes: Manufacturing and reproducing magnetic and optical media; Audio and video equipment manufacturing; Photographic equipment and supplies merchant wholesalers.

⁵¹ Audiovisual Advertising includes: Media representatives.

jobs (8.4%), Film Additional Support⁵² with 155 jobs (5.8%), and Film Distribution⁵³ with 19 jobs (0.7%) (see Figure 5).



Finally, the biggest contributors to the Music Sector's employment are Recording & Publishing⁵⁴ and Live Music & Touring,⁵⁵ with 960 (29.6%) and 680 (21%) jobs respectively, followed by Music Education⁵⁶ and Instruments and Equipment,⁵⁷ creating 571 (17.6%) and 482 jobs (14.9%)

⁵² Film Additional Support includes: Other motion pictures and video industries

⁵³ Film Distribution includes: Motions Pictures & Video Distribution

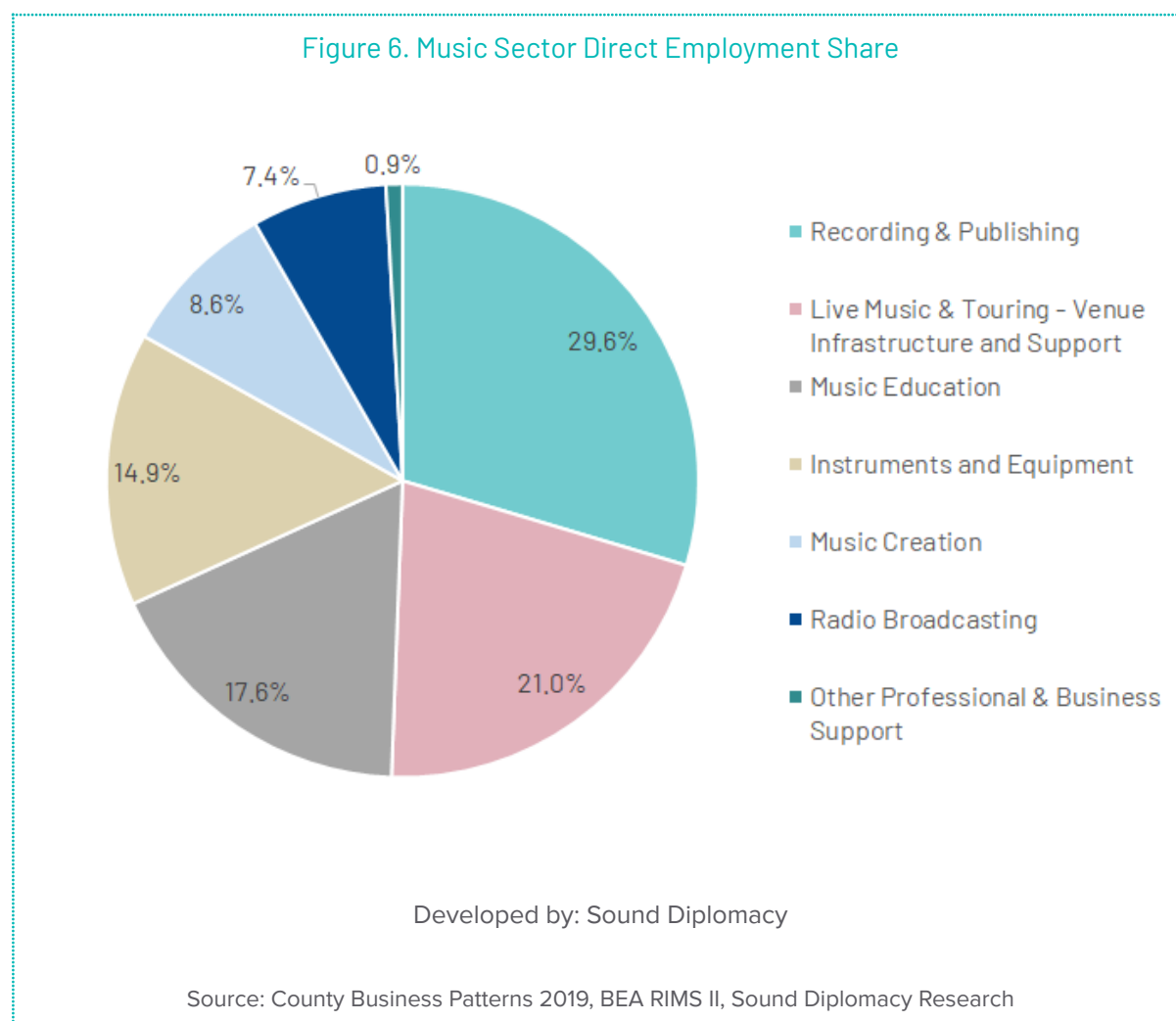
⁵⁴ Recording and Publishing includes: Sound Recording Studios, Electronic Stores, Music Publishers, Record Production & Distribution, and Other Sound Recording Industries

⁵⁵ Live Music & Touring includes: Theater Companies & Dinner Theaters, Promoters of Performing Arts with and without Facilities, Agents & Managers for Artists, and Drinking Places

⁵⁶ Music Education includes: Fine Arts Schools, and Music-related Apprenticeship Training

⁵⁷ Instruments and Equipment: Musical instrument and supplies stores; Musical instrument manufacturing

respectively. The remaining 16.9% is generated by Music Creation⁵⁸ (276 jobs), Radio Broadcasting⁵⁹ (240 jobs) and Other Professional & Businesses Support⁶⁰ (30 jobs).



To put the level of direct employment in perspective, the direct employment generated by the three sectors studied are compared with other traditional industries in the County. **The direct employment generated by the Digital Entertainment sector in 2019 (7,942 jobs) represented 2.0% of total local employment.** This figure is almost equal to the contribution of the **Real Estate & Rental & Leasing sector to the local economy, which consisted of 8,262 (2.1%) employees** over the same period. **The Film and the Music sectors contributed 2,671 (0.7%) and 3,239 (0.8%) jobs respectively.** This figure is greater than the contribution made by

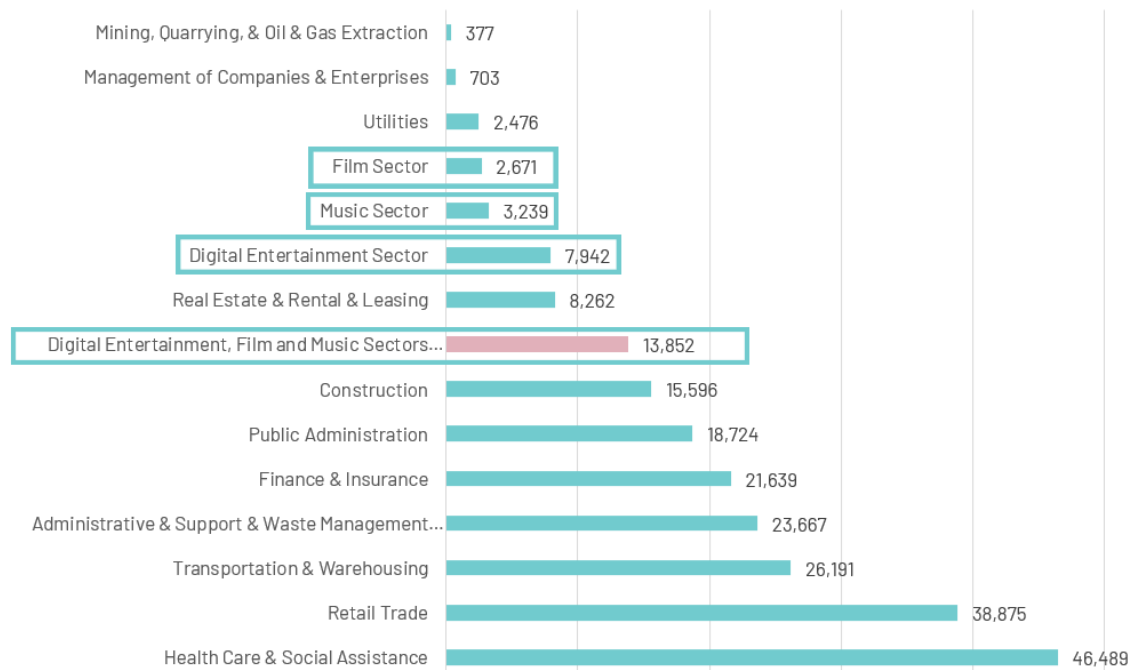
⁵⁸ Music Creation includes: Musical Groups & Artists, Independent Artists, Writers, and Performers

⁵⁹ Radio Broadcasting includes: Radio networks, and Radio Stations

⁶⁰ Other Professional & Business Support includes: Business Association

the Utilities sector, with 2,476 (0.6%) jobs. When combined, the Digital Entertainment, Film and Music sectors contribute 13,852 jobs to the local economy (3.5%) (see Figure 7).

Figure 7. Employees by Sector, 2019



Developed by: Sound Diplomacy

Source: County Business Patterns 2018, BEA RIMS II, Sound Diplomacy Research

Indirect Impact and Induced Impact

The indirect economic impact is calculated by looking at the change in the value of output and employment driven by suppliers of the analyzed sectors. It represents the jobs and output generated by local businesses that supply goods and services to DeKalb County's Film, Music and Digital Entertainment sectors. To calculate it, it is necessary to include the measurement of economic exchanges with suppliers that do not necessarily belong to these sectors, such as advertising, transportation, maintenance, legal services and communication. This process is carried out using the Type I Multipliers, available in the BEA, RIMS II model for 2019.

In 2019, the indirect economic impact of the three sectors in DeKalb County created an indirect output of \$2.45 billion and a GVA of \$1.57 billion. At the same time, it is estimated that 8,057 jobs in DeKalb County were indirectly supported by the Film, Music and Digital Entertainment sectors.

To give an idea of the size of the indirect effect of these industries on the local economy, it is estimated that \$1,000 of output generated from the Film, Music and Digital Entertainment sectors is indirectly supporting \$317.92 of the output in other industries in the county.

When evaluating the indirect effect for each one of these industries, we find that the Digital Entertainment sector generates an indirect output of \$1.65 billion, and an indirect GVA of \$1.06 million, supporting 6,002 jobs. In the case of the indirect effect of the Film sector, an indirect output of \$580 million, and an indirect GVA of \$368 million, supported 1,423 jobs. Finally, for the Music sector, we estimated that the indirect output reached \$230 million, an indirect GVA of \$145 million and supported 631 indirect jobs.

The induced economic impact is the economic value (output and employment) derived from “the spending of workers whose earnings are affected by a final-demand change, often called the household-spending effect”.⁶¹ In other words, this impact is derived from the spending of workers whose wages are supported directly and indirectly by the three sectors studied. This includes, for example, money these workers spent on services, food, entertainment, transportation, etc. The induced output of the Film, Music and Digital Entertainment sectors in the county reached \$1.24 billion, with a GVA of \$747 million in 2019, and supported 4,949 jobs. The data shows that \$1,000 of the sectors studied output is generating an induced effect of \$160 on different industries of the economy.

When focusing on each of the three industries, we found that the induced effect of the Digital Entertainment sector reached an output of \$881 million, a GVA of \$533 million, and supported 3,531 jobs. In the case of the Film industry, the induced output reached \$217 million, the induced GVA of \$131 million, and supported 867 jobs. Finally, the Music sector generated an induced output of \$137 million, an induced GVA of \$83 million, and supported 551 induced jobs.

Economic Impact Findings

⁶¹ RIMS II: An essential tool for regional developers and planners, page 53.

The Film, Music and Digital Entertainment sectors are dynamic and significant supporters of employment and economic development in DeKalb County. The direct employment generated by these three sectors reaches around 13,852 jobs annually, which accounts for 3.5% of the total number of jobs in DeKalb County. This figure exceeds the contribution of traditional sectors such as Real Estate, Rental & Leasing, which generates 8,262 jobs (2.1% of the local jobs).

The indirect effect generated by the Digital Entertainment sector is significantly higher than that generated by the Music or Film sectors in the county. For each job generated by the Digital Entertainment sector, 0.76 jobs are supported in different sectors. In contrast, for the Music and Film sectors, 0.53 and 0.19 positions in different sectors are supported, respectively.

This means that the Digital Entertainment sector has a higher level of productive chaining, since there are more agents providing services to this sector. That may be due to the natural conditions of the industry, which require more complex processes and a larger number of suppliers from other industries, as well as a higher level of professionalization and industrial development.

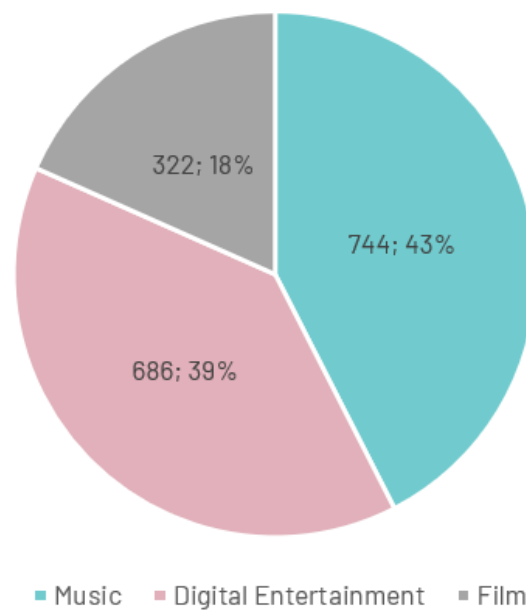
3.4 Mapping Analysis

3.4.1 Mapping Findings

The mapping exercise conducted by Sound Diplomacy identified film, music and digital entertainment-related assets in DeKalb County, GA. The geographical area includes five Districts in which there are 1,752 assets mapped. All assets can be viewed in the [interactive map](#). For a full analysis, please see Appendix 3.

The highest number of assets can be seen in the Music sector with 744 (43%), followed by the Digital Entertainment sector with 686 (39%), and the Film sector with 322 (18%). This composition of the sectors in the area shows the high availability of spaces for music-related activities. In context, music could have a higher number of assets because one of the main revenue streams of the sector is derived from live performances, via music venues. For this reason, there is a greater need for venue assets that allow contact between the 'creator' and 'consumer'. This does not necessarily occur in the Film or Digital Entertainment sectors, which rely more on digital technologies to reach the end-consumer.

Figure 8. Distribution of Film, Music and Digital Entertainment Assets in DeKalb, GA

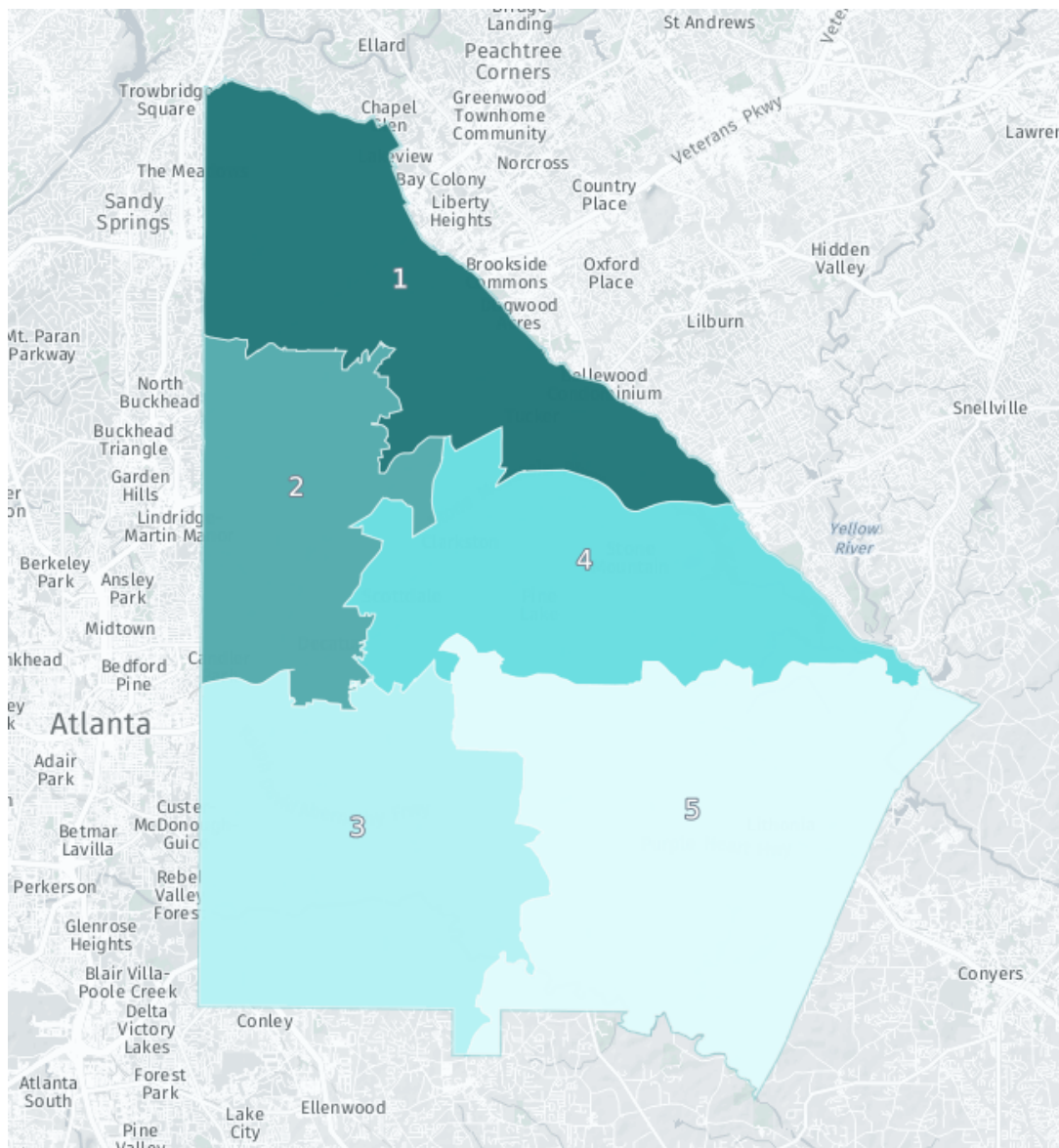


Developed by: Sound Diplomacy

Source: Film, Music and Digital Entertainment Asset Mapping for DeKalb County, GA, Sound Diplomacy

Atlanta and Decatur together see a concentration of 895 (51%) of the assets in DeKalb County: as approximately only 10% of Atlanta is located in the county, and Decatur is the county's seat, this is an expected finding.

Map 1. Number of Assets Heat Map by District in DeKalb County, GA

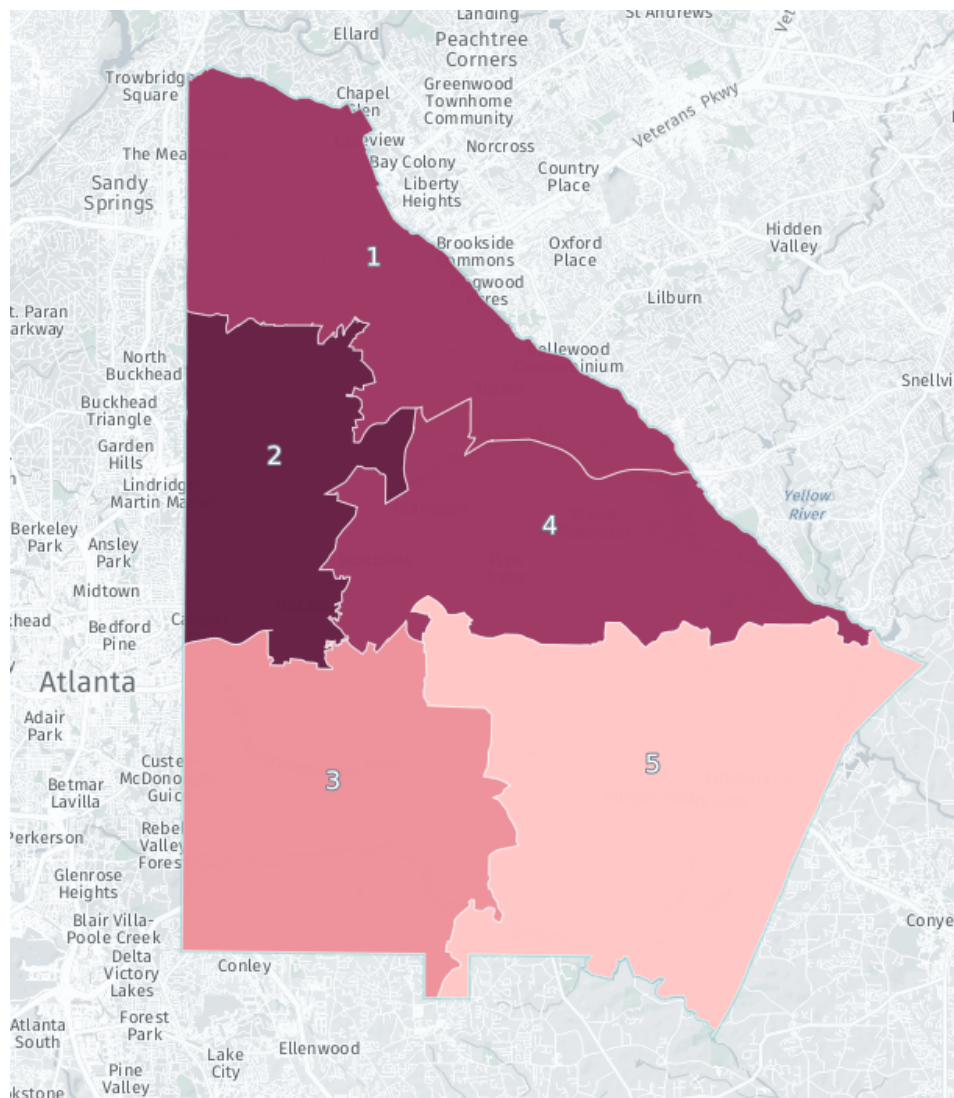


Developed by: Sound Diplomacy

Source: Film, Music and Digital Entertainment Asset Mapping for DeKalb County, GA, Sound Diplomacy

Districts 1 and 2 combined concentrate 62% (1,086) of the overall assets in the county: the highest number of assets overall is in District 1 with 577 (33%) assets. That being said, District 2 has the highest number of assets per square mile (14.2), followed by District 1 (11.3). In contrast, District 5 only has 2.2 assets per square mile.

Map 2. District Density (Music Assets in relation to District size) in DeKalb County, GA



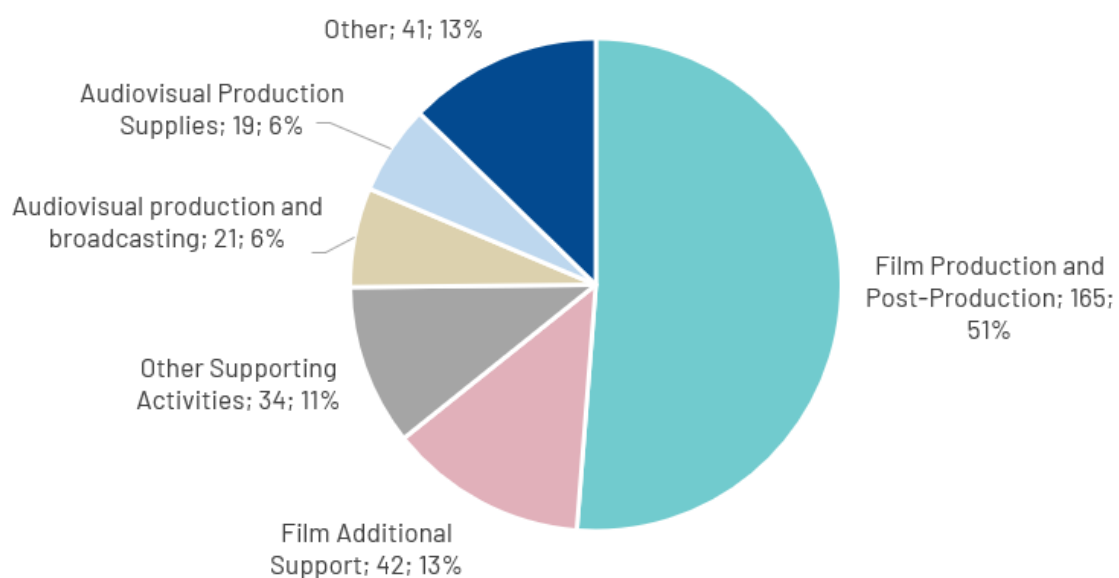
Developed by: Sound Diplomacy

Source: Film, Music and Digital Entertainment Asset Mapping for DeKalb County, GA, Sound Diplomacy

Film Sector

Film Production and Post-Production make up the greatest proportion of Film-related assets with 165 (51%). The second largest category by proportion of total assets is Film Additional Support, with a total of 42 (13%) assets. This shows a strong availability within the Production link of the Film value chain.

Figure 9. Distribution of Film Assets by Category in DeKalb, GA



Developed by: Sound Diplomacy

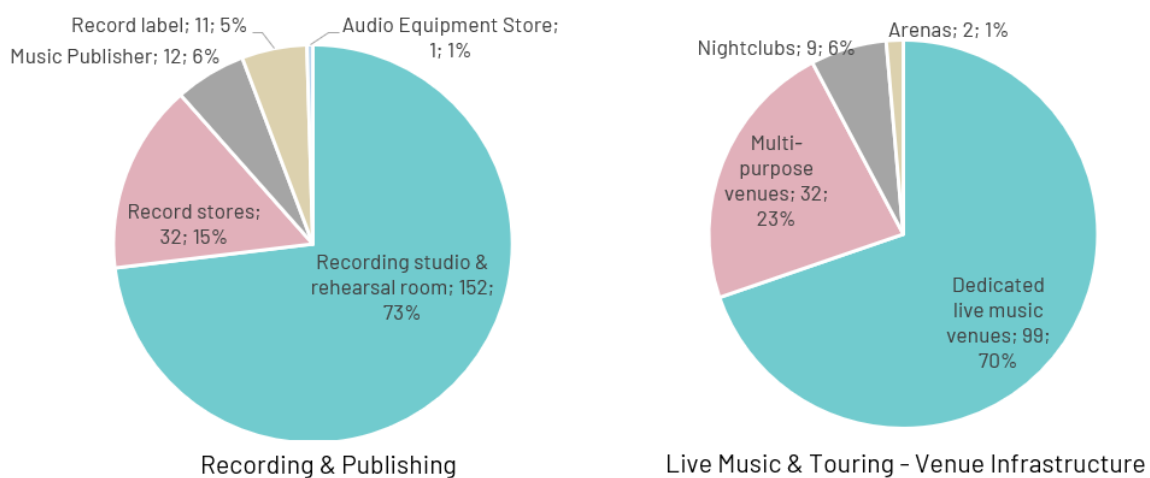
Source: Film, Music and Digital Entertainment Asset Mapping for DeKalb County, GA, Sound Diplomacy

Together, Districts 1, 2, and 4, host 247 music assets (77%); District 2 has 3.4 Film assets per square mile, District 1 has 1.4, and District 4 has 1.1. In contrast, District 5 has only 0.5 film assets, making District 5 Film assets the lowest type of asset per square mile overall in the three sectors.

Music Sector

The Recording & Publishing assets have the highest presence in the county, with 208 (28%) assets, and a high concentration in Decatur (49 assets - 24%) and Atlanta (43 assets - 21%); of these, 152 (73%) are Recording Studios & Rehearsal Rooms. This indicates that commercial studios still have sufficient demand, despite generally having high fixed costs, and a market trend to use home studios. This is in line with DeKalb (including Atlanta) being nationally recognized for its availability and quality of recording studios.

Figure 10. Distribution of Recording & Publishing Assets and Live Music & Touring - Venue Infrastructure, by Category in DeKalb, GA



Developed by: Sound Diplomacy

Source: Film, Music and Digital Entertainment Asset Mapping for DeKalb County, GA, Sound Diplomacy

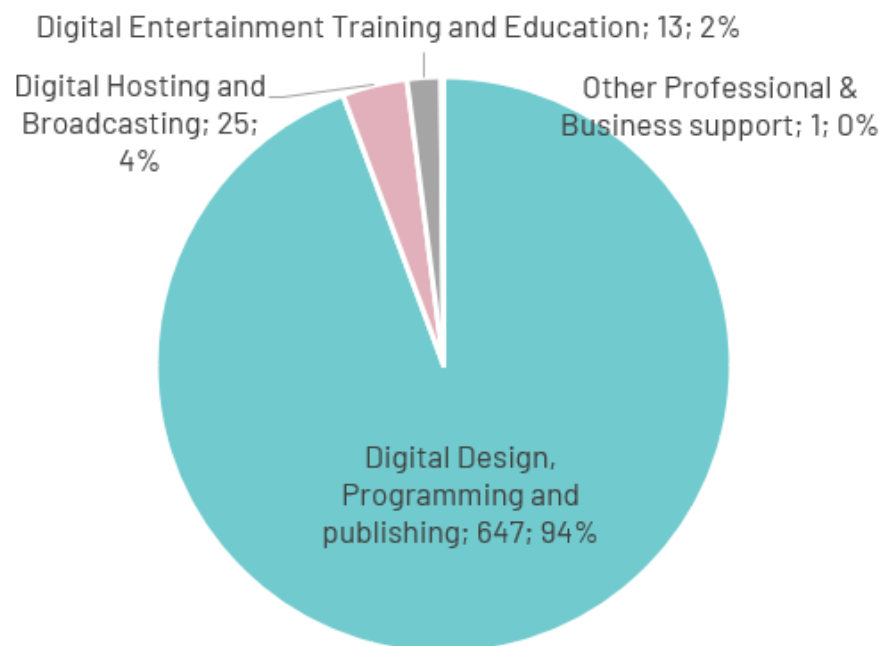
Venue Infrastructure is the second music-related activity with the most presence in the county with 142 (19%) assets: from those, 99 (70%) are dedicated live music venues and 32 (23%) are multi-purpose venues. This indicates that there is a strength in the local music ecosystem with venues that supply proper technical and quality requirements for music performers, given that they are specialized in providing exhibition services for live music performances.

The biggest clusters of music venues are in Districts 2 and 4, with a high concentration in Atlanta (55 venues - 39%) and Decatur (30 venues - 21%); 48 (34%) music venues are in District 2 and District 4 has 33 (23%) assets. Additionally, District 2 has 1.3 venues per square mile and District 4 has 0.7, yet in contrast, District 5 has 0.1 venues per square mile.

Digital Entertainment Sector

The greatest number of Digital Entertainment assets are 647 (94%) Digital Design, Programming, and Publishing assets: within that activity, 280 (43%) are Software Programming assets, 260 (40%) are Graphic Design Artists and Consulting Services, 79 (12%) are Games and Computer Software Publishing assets, and 28 (4%) are Computer Software Consulting Services assets. This shows a strong availability within the Creation and Production links of the Digital Entertainment value chain.

Figure 11. Distribution of Digital Entertainment Assets by Category in DeKalb, GA



Developed by: Sound Diplomacy

Source: Film, Music and Digital Entertainment Asset Mapping for DeKalb County, GA, Sound Diplomacy

Combined, Districts 1, 2, and 4 hold 580 digital entertainment assets (85%). District 1 has 6.3 assets per square mile, District 2 has 4.9, and District 4 has 1.7. In contrast, District 5 only has 0.7 Digital Entertainment assets per square mile.

4. Comparative Analysis and SWOT

4.1 Overview of City Regulations and Policies

The following tables and analysis provide an overview of how cities across DeKalb County compare to each other. The purpose of this section is to support the DEC's understanding of which policies and regulations have been implemented in the cities that form DeKalb County, drawing attention to differences between them.

Table 4. Overview of City Regulations and Policies

ATLANTA ⁶²		AVONDALE ESTATES	
Film Permit	Yes ⁶³	Film Permit	Yes ⁷⁰
Event Permit	Yes ⁶⁴	Event Permit	Yes ⁷¹
Funding	Yes ⁶⁵	Funding	Yes ⁷² (general, not specific to entertainment)
Tourism	Yes ⁶⁶	Tourism	No
Noise Permit	Yes ⁶⁷	Noise Permit	Yes ⁷³
Liquor Permit	Yes ⁶⁸		

⁶² Certain areas of Atlanta are in DeKalb County

⁶³ City of Atlanta, Georgia (n.d.a)

⁶⁴ City of Atlanta, Georgia (n.d.b)

⁶⁵ City of Atlanta, Mayor's Office of Cultural Affairs (2021)

⁶⁶ Atlanta Convention and Visitors Bureau (2022b)

⁶⁷ City of Atlanta, Georgia (1997)

⁶⁸ Atlanta Police Department (n.d.)

⁷⁰ City of Avondale Estates, Georgia (n.d.d)

⁷¹ City of Avondale Estates, Georgia (n.d.c)

⁷² City of Avondale Estates, Georgia (2022)

⁷³ City of Avondale Estates, Georgia (2018)

Entertainment District	Yes ⁶⁹
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Liquor Permit	Yes ⁷⁴
Entertainment District	Yes ⁷⁵ (open container policy)

BROOKHAVEN	
Film Permit	Yes ⁷⁶ (some DeKalb County oversight regarding COVID safety)
Event Permit	Yes ⁷⁷ (not much info on website)
Funding	No ⁷⁸ (but plans are set out to develop and expand arts funding in the Arts & Culture Strategic Plan)
Tourism	Yes ⁷⁹
Noise Permit	Yes ⁸⁰

CHAMBLEE	
Film Permit	Yes (some DeKalb County oversight regarding location scouting and safety precautions) ⁸³
Event Permit	Yes ⁸⁴
Funding	No ⁸⁵ (and mentions of funding are usually associated with public/visual art)
Tourism	Discover DeKalb oversight ⁸⁶
Noise Permit	Yes ⁸⁷

⁶⁹ Atlanta Convention and Visitors Bureau (2022a)

⁷⁴ City of Avondale Estates, Georgia (n.d.a)

⁷⁵ City of Avondale Estates, Georgia (n.d.b)

⁷⁶ Brookhaven, Georgia (n.d.c)

⁷⁷ Brookhaven, Georgia (n.d.b)

⁷⁸ Brookhaven, Georgia (2020a)

⁷⁹ Explore Brookhaven (2022)

⁸⁰ Brookhaven, Georgia (2021)

⁸³ City of Chamblee, Georgia (n.d.d)

⁸⁴ City of Chamblee, Georgia (2021)

⁸⁵ City of Chamblee, Georgia (2019)

⁸⁶ DeKalb Convention and Visitors Bureau (2021)

⁸⁷ City of Chamblee, Georgia (n.d.c)

Liquor Permit	Yes ⁸¹
Entertainment District	No ⁸² (there are plans for an “Apple Valley Entertainment District”)

Liquor Permit	Yes ⁸⁸
Entertainment District	Yes (technically downtown is the City’s commercial district.” ⁸⁹

CLARKSTON	
Film Permit	No (referred to in code of ordinances, but not accessible online)
Event Permit	No
Funding	No
Tourism	No
Noise Permit	No (referred to in code of ordinances, but not accessible online)
Liquor Permit	Yes ⁹⁰

DECATUR	
Film Permit	Yes ⁹²
Event Permit	Yes ⁹³
Funding	Some arts funding, mostly education related ⁹⁴ Expanded funding mentioned in the Cultural Arts Masterplan ⁹⁵
Tourism	Yes ⁹⁶
Noise Permit	No (or at least not publicly accessible)
Liquor Permit	Yes ⁹⁷

⁸¹ Brookhaven, Georgia (n.d.a)

⁸² Brookhaven, Georgia (2020b)

⁸⁸ City of Chamblee, Georgia (n.d.a)

⁸⁹ City of Chamblee, Georgia (n.d.b)

⁹⁰ City of Clarkston, Georgia (2018)

⁹² City of Decatur, Georgia (n.d.d)

⁹³ City of Decatur, Georgia (n.d.c)

⁹⁴ Decatur Area Arts Council (2022)

⁹⁵ City of Decatur, Georgia (2010)

⁹⁶ Visit Decatur (n.d.)

⁹⁷ City of Decatur, Georgia (n.d.a)

Entertainment District	No (reference is made to its development in the Clarkston Comprehensive Plan 2025) ⁹¹
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Entertainment District	Yes ⁹⁸
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DORAVILLE	
Film Permit	Yes ⁹⁹
Event Permit	Yes ¹⁰⁰
Funding	No
Tourism	No
Noise Permit	No
Liquor Permit	Yes ¹⁰¹
Entertainment District	No

DUNWOODY	
Film Permit	Yes ¹⁰²
Event Permit	Yes ¹⁰³
Funding	No
Tourism	Yes ¹⁰⁴
Noise Permit	Yes ¹⁰⁵
Liquor Permit	Yes ¹⁰⁶
Entertainment District	Yes ¹⁰⁷

⁹¹ City of Clarkston, Georgia (2006)

⁹⁸ City of Decatur, Georgia (n.d.b)

⁹⁹ City of Doraville, Georgia (n.d.b)

¹⁰⁰ City of Doraville, Georgia (n.d.c)

¹⁰¹ City of Doraville, Georgia (n.d.a)

¹⁰² City of Dunwoody, Georgia (n.d.b)

¹⁰³ City of Dunwoody, Georgia (n.d.c)

¹⁰⁴ Discover Dunwoody (n.d.)

¹⁰⁵ City of Dunwoody, Georgia (2021)

¹⁰⁶ City of Dunwoody, Georgia (n.d.a)

¹⁰⁷ Zachary Hansen (2021a)

LITHONIA	
Film Permit	Yes (with some DeKalb County oversight) ¹⁰⁸
Event Permit	Yes ¹⁰⁹
Funding	No
Tourism	No
Noise Permit	No
Liquor Permit	No
Entertainment District	Yes ¹¹⁰ (with plans for further development)

PINELAKE	
Film Permit	Possibly under DeKalb purview
Event Permit	City-owned beach/lakehouse facility rental ¹¹¹
Funding	Yes (via the municipal arts panel). ¹¹²
Tourism	Somewhat (website has a “things to do” section, but nothing arts related). ¹¹³
Noise Permit	Yes ¹¹⁴
Liquor Permit	Yes ¹¹⁵
Entertainment District	Technically, the Lake is the entertainment center ¹¹⁶

¹⁰⁸ City of Lithonia (n.d.b)

¹⁰⁹ City of Lithonia (n.d.a)

¹¹⁰ City of Lithonia, Georgia (2010)

¹¹¹ City of Pine Lake, Georgia (2022b)

¹¹² City of Pine Lake, Georgia (2022c)

¹¹³ City of Pine Lake, Georgia (2022d)

¹¹⁴ City of Pine Lake, Georgia (2022a)

¹¹⁵ City of Pine Lake, Georgia (2021)

¹¹⁶ City of Pine Lake, Georgia (2022d)

STONECREST	
Film Permit	Yes (with streamlined approach) ¹¹⁷
Event Permit	Yes ¹¹⁸
Funding	No
Tourism	Discover DeKalb
Noise Permit	No
Liquor Permit	Yes ¹¹⁹ (with some DeKalb County oversight)
Entertainment District	No

STONE MOUNTAIN	
Film Permit	Yes ¹²⁰
Event Permit	No
Funding	No
Tourism	Discover DeKalb
Noise Permit	Yes ¹²¹
Liquor Permit	No (possibly under DeKalb County purview)
Entertainment District	Yes ¹²²

TUCKER	
Film Permit	Yes (under DeKalb purview) ¹²³
Event Permit	Yes ¹²⁴

¹¹⁷ City of Stonecrest, Georgia (n.d.b)

¹¹⁸ City of Stonecrest, Georgia (n.d.a)

¹¹⁹ City of Stonecrest, Georgia (2022a)

¹²⁰ City of Stone Mountain, Georgia (n.d.)

¹²¹ Stone Mountain, Georgia (2021)

¹²² City of Stone Mountain, Georgia (2017)

¹²³ City of Tucker, Georgia (2022d)

¹²⁴ City of Tucker, Georgia (n.d)

Funding	Somewhat (mostly visual arts related) ¹²⁵
Tourism	Under Discover DeKalb purview ¹²⁶
Noise Permit	Yes ¹²⁷
Liquor Permit	Yes ¹²⁸
Entertainment District	Yes ¹²⁹

4.2 SWOT Analysis

The strengths, weaknesses, opportunities and threats (SWOT) of the DeKalb film, music and digital entertainment industries have been compiled with the findings from the regulatory assessment, asset mapping, roundtables and interviews, and economic impact assessment to create a comprehensive SWOT Analysis as outlined below.

Table 5. DeKalb Film, Music and Digital Entertainment SWOT Analysis

STRENGTHS
<p>All Sectors</p> <ul style="list-style-type: none"> • The Film and TV, Music, and Digital Entertainment industries are great supporters of employment and economic development in DeKalb County and bring together a diverse range of talent. • Most residents participate in creative and cultural life, making DeKalb a hub of creativity and collaboration. • DeKalb County is forward thinking and understands the impact the creative industries have and will have in the county.

¹²⁵ City of Tucker, Georgia (2021)

¹²⁶ Georgia Department of Economic Development (2022c)

¹²⁷ City of Tucker, Georgia (2022c)

¹²⁸ City of Tucker, Georgia (2022a)

¹²⁹ City of Tucker, Georgia (2022b)

- There is a strong presence of the arts in education that aims to provide confidence building as well as soft skills.
- There is an important diversity of students in DeKalb (DeKalb graduates more Black students than anywhere in the country, and 50% are women).
- The transportation network in the county and in the Greater Atlanta area (MARTA) is highly efficient and effective.
- MARTA seems more open to supportive initiatives nowadays than in the past.
- Due to COVID-19, there is now strong support and better communication between all the creative industries, and between counties and governments.
- COVID-19 spurred the development of more home studios and workarounds, rather than relying on big studios or resources. This was beneficial for the animation industry because more people were at home watching content; the creation of home studios allowed supply to meet rising demand.

Film

- Film and TV are key factors in DeKalb's economic development and are continuing to grow, drawing people to the county.
- The DeKalb Entertainment Commission provides strong support for the film industry, and is continually trying to improve it through successful initiatives.
- DeKalb's Film Commission is very active, responsive and helpful. It occupies a good moderator role and gives clear guidelines.
- FilmApp is very useful, functional, and makes municipality and industry work easier.
- The incentives Georgia offers for film are very valued. The county has resources available like low resource loans, relocation to economic empowerment zones, etc.
- Tax breaks for filming and producing content is a key initiative and an incentive for talent to leave California, and other major film states and regions, and come to Georgia.
- DeKalb is geographically large and with different sceneries so the lay of the land is perfect for film and TV production.
- The most number of Film-related assets are Film Production and Post-Production assets with 165 (51%). The second category with the most presence is Film Additional Support with a total of 42 (13%) assets. This shows a strong availability within the Production link of the Film value chain.
- There is potential for future partnerships between Georgia Film Academy and DeKalb to provide technical training for local students.
- DeKalb has campuses and curriculums for film education.
- Georgia State and Georgia Film Academy carry out successful professional development initiatives, with potential for collaboration.

Music

- The music industry is well-supported by individuals.
- There is continuity from schools to being a professional in the music industry.
- The diversity in music education structures impacts the students and makes them feel like everyone's voice is being supported.
- Musicians can save on expenses like sound and video recording through a transferable tax credit of up to 30 percent.
- Places like Pullman Yards or Decatur host interesting venues for artists.
- Within the Music Sector, 152 (73%) assets are Recording Studios & Rehearsal Rooms. This indicates that commercial studios still have sufficient demand, despite the high fixed costs associated with commercial studios and the market trend towards using home studios.
- Venue Infrastructure is the music-related activity with the second-largest presence in the county, with 142 (19%) assets. From those, 99 (70%) are dedicated live music venues and 32 (23%) are multi-purpose venues. This indicates that there is a strength in the local music ecosystem with venues that supply proper technical and quality requirements for music performers, given that they are specialized in providing exhibition services for live music performances.
- The GRAMMY museum is significant for local music showcasing.

Digital Entertainment

- Interactive entertainment professionals can benefit from the 30 percent transferable tax credit.
- Schools in DeKalb are developing Digital Entertainment talent that is prepared to respond to the current professional need in the region.
- Recent Digital Entertainment education programs have made considerable developments, having progressed notably in the last few years.
- The highest number of Digital Entertainment assets (647 / 94%) are concentrated in the Digital Design, Programming, and Publishing assets. Within that activity, 280 (43%) are Software Programming assets, 260 (40%) are Graphic Design Artists and Consulting Services, 79 (12%) are Games and Computer Software Publishing assets, and 28 (4%) are Computer Software Consulting Services assets. This shows a strong availability within the Creation and Production links of the Digital Entertainment value chain.
- The indirect effect generated by the Digital Entertainment sector is significantly higher than that of the Music and Film. This means that the Digital Entertainment sector has a higher level of productive chaining, which signifies that there are more agents providing services to this sector. This may be due to the natural conditions of the industry, which require more complex processes and a larger number of

suppliers from other industries, as well as a higher level of professionalization and industrial development.

WEAKNESSES

All Sectors

- The Music and Digital Entertainment industries lack institutional support county-wide.
- DeKalb lacks an entertainment area where people can stay local instead of having to go elsewhere for their leisure.
- DeKalb doesn't have enough youth initiatives in the creative industries (e.g. incentivised internships).
- Students lack exposure to pathways and opportunities in the creative industries (e.g. small loans for creators).
- DeKalb supports the technical side of the creative industries but lacks support for the creative talent side.
- DeKalb does not utilize, train, or provide enough professional development opportunities for local talent in the music and digital entertainment industries, and it is still a challenge for creatives to tie together talent with opportunities.
- The inventory presenting creative programs and resources is not accurate and the website needs SEO work.
- There is not enough visibility for the creative industries. The creative industries are very siloed and there is a lack of information, which makes communication and collaboration difficult.
- DeKalb lacks a robust strategic plan that encourages every stakeholder and constituent to align with its long term goals and objectives and attract more businesses and audiences to the county.
- There are not enough studios allowing artists with a lower budget to work with them.
- Lack of funding and funding sources.
- Support for smaller projects for continued growth is missing.
- There are no incentives for apprenticeships in Georgia.
- Relationships with the police in smaller communities are not the best. The problems are such as not being able to coordinate their own security, or police, paying for required officers who would leave to go on other calls, etc.
- The Performing Arts Center is currently under the Parks & Recreation Department, which stakeholders feel does not understand art and entertainment.
- The Performing Arts Center is not utilized enough for diverse cultural offerings, aside from graduations or rallies.

- Distribution is an issue because Time-Warner has a monopoly in the local market.

Film

- The workforce can be inexperienced and lack the skills necessary to meet the needs of current productions.
- DeKalb lacks a strong level of community awareness and engagement that enables people to be more informed of projects. There have been experiences of film crews receiving noise complaints from residents.
- There is a lack of home-grown productions that are conceived, written, cast, and produced in the county.
- There is a disconnect between entertainment workers and auxiliary film workers.
- It is difficult to get on-location spaces for filming, such as colleges, universities and schools, as well as jails and hospitals, as they are always in high demand and short supply.
- Film classes are limited and are not giving students the diverse education they need. Not enough intentional investment in the student population.

Music

- Live music venues lack appreciation and support.
- Institutional infrastructure and music business support is lacking in the music industry.
- DeKalb lacks robust programs that create workflow and pipelines that fill out all the aspects needed to create music.
- DeKalb is missing a strong marketing plan for music productions where studios and talent are publicized to attract creators to come to the county to record.
- There is a lack of variety in size and diversity of offer across the high number of music venues

Digital Entertainment

- The Digital Entertainment industry in DeKalb is missing a strong ecosystem of creators.
- There is a lack of transparency between workers and film studios about what current and forecasted needs are that can be developed to stay ahead of the curve.

OPPORTUNITIES

All Sectors

- Because of industry connections, there is an opportunity to expand more significantly and more permanently into other metro areas like Macon, Savannah, Augusta.
- Local colleges and universities have programs in film, music, and digital entertainment that attract students from other regions.

Music

- Even though DeKalb County does not have major recording studios, it can still do engineering and post-production work that is remote (ex. work remotely with Los Angeles for post production rather than going).

THREATS

All Sectors

- Places like Los Angeles and New York have more opportunities for leisure and enjoyment.
- Local creatives leave DeKalb for larger markets for areas like Los Angeles and New York after they reach a certain threshold.

Film

- DeKalb is in direct competition with Louisiana regarding tax incentives for film.

Music

- Music artists leave the area to go to places like Los Angeles and New York because there are more opportunities and a larger audience.

5. Five Year Strategy and Implementation Plan

The following recommendations are based on desk research, the mapping, economic impact assessment, and stakeholder engagement completed by Sound Diplomacy and supported by Decide DeKalb Development Authority, DeKalb Entertainment Commission, and the DeKalb film, music and digital entertainment ecosystems. They will be critical to growing and strengthening the role of these industries in DeKalb, building resilience, strengthening the local economy, and developing the existing work and attracting new businesses and investment to create sustainable and resilient industries. Following the implementation of these recommendations, DeKalb should continue to measure the impact of the film, music

and digital entertainment ecosystems to respond to further improvements and needs, and evaluate success.

The recommendations are categorized by the recommended year that implementation takes place, looking across a 5 year period to align with Decide DeKalb and the DEC's strategic processes. Estimated budgets have been provided and developed in partnership with the DEC for each recommendation, however, it must be noted that these are subject to change considering staff and partner capacity and resources that may be revealed through the process of implementation. These estimations were based on average market costs for the services described in the recommendations for the purpose of providing the DEC with budgetary guidance for fund requests and allocations. Any final and precise costs can only be determined by soliciting proper proposals for specific scopes of work with specific providers, as will be determined through the implementation process.

Each recommendation shares potential ways to measure the impact, as well as the United Nations Sustainable Development Goal (SDG) they relate to. The full list of SDGs can be accessed at this link - <https://sdgs.un.org/goals#>

5.1 Increase Resilience Across the Film, Music and Digital Entertainment Industries

DeKalb County has the resources within the film, music and digital entertainment industries to increase resilience and continue to grow in an impactful and sustainable way. Current tax incentives help DeKalb remain a key player in a competitive market for film production opportunities, giving the county advantages against other regions and states that do not offer them. Whilst increased resilience within the film, music and digital entertainment industries will come from honing skills, and increasing partnerships through meaningful collaborations and insightful processes, ongoing advocacy for the value of the creative industries will be needed to maintain growth and expansion, and to make the case for the continuation of state-wide incentives.

The regulatory assessment highlighted the strong presence of the arts in DeKalb's education system, and high levels of diversity amongst the student population - aspects that can be leveraged further. There is continuity from taking part in school-based education to being a professional in the music sector, while digital entertainment education is nurturing young talent who are prepared to respond to the current professional needs. DeKalb's education system provides many avenues of access and opportunity for children and young people, but

continued education for young professionals is needed to place DeKalb as a leader in talent cultivation and retention; crucial factors in developing resilient industries. Apprenticeship, mentor incentives and scholarships in DeKalb are missing. Stakeholders identified a need for further skill development in the workforce, as basic computer and communication skills are lacking in entry-level job applicants. Additionally, all sectors need access to investors, CPAs, lawyers, and other service providers that make up other portions of the shared working ecosystem.

Stakeholder conversations also highlighted specific concerns around limited opportunities for professionals interested in the artistic side of digital entertainment to collaborate with companies attracted by the County's cultural tax incentives. In this case, while the mapping may show a strong availability within the Creation and Production links of the Digital Entertainment value chain, it cannot depict the lack of fostered collaboration between local digital artists and creatives, and production companies that could provide opportunities and exposure. Increasing knowledge of and access to creative career paths in digital entertainment and music business works to reduce talent drain to other established creative cities such as Los Angeles or New York, and contribute to people seeking local entertainment for their leisure.

Stakeholder feedback and our mapping also showed that the film industry is geographically fragmented and more crew awareness is needed in smaller towns to help draw productions to them and increase county-wide capacity. Film workers noted that there is less support for the talent-side of film than the production-side, which was also noted in other industries, and a more concerted effort and recognition of need is critical to grow the skilled workforce. Feedback also highlighted a lack of creators within the digital entertainment field.

DeKalb's entertainment ecosystem extends beyond business owners and production companies to include all of the sectors that materially contribute to productions. In 2019, the Music and Digital Entertainment industries delivered a total economic impact of 26,856 jobs, a total output of \$11.4 billion and a total GVA of \$7.34 billion. This includes builders, welders, craft makers, service industry and hospitality workers, and others whose auxiliary products and services each help the entertainment industry in various ways. However, stakeholders highlighted these services can be difficult to locate, requiring greater awareness of cross-sector resources.

Finally, there is a need for increased and continued community engagement across all sectors concerning the available cultural offerings, attractions, and entertainment opportunities. This was also the case in connection to public awareness of the roles that form the entertainment industries and the career opportunities within them. Expanding and facilitating initiatives that

are aimed at apprenticeships for young people could be the key to improving the community's perception of and relationship with the entertainment industry.

Recommendation 1: Support Partners to Create a Best Practice State and National Working Group To Improve Tax Credits To Attract and Retain Talent

Year: 1

Initiated by: Association of Film Commissioners International, DeKalb Entertainment Commission, Georgia Department of Economic Development, GA Power, GDOT, Metro Chamber / **Supported by:** Cultural and Economic Development representatives from the states of Louisiana, Indiana, Oklahoma and any other relevant partners

Cost Estimate: \$180,000 - \$600,000 / **Itemized:** \$15,000 - \$50,000 per month for hire of lobbyist on retainer

DeKalb has an opportunity to play a key role in supporting partners and enhancing advocacy for the development, expansion and diversification of incentive programs to attract and retain entertainment talent. Utilizing a more organized network to do so - to capture and disseminate research and best practice and lead from the front - would benefit the county. For example, working with the Association of Film Commissioners International, the Georgia Department of Economic Development and other state departments and elected officials to recommend the creation of a working group that reviews and establishes best practices across states that offer tax credits to the creative industries, such as Louisiana, Oklahoma and Indiana. Utilize this working group to explore innovative ways of advocating for, measuring the value of and in the end administering credits, and test and evaluate within the group alternative forms of relief to future proof against any possible changes in legislation and support.

Areas that would benefit DeKalb if researched and discussed as part of this group are:

- Dedicated tax credits for home-grown productions
- Incentivization for local cross-sector working to enhance the County's entertainment supply chain
- Incentivization of projects with diverse crews, actors, artists, etc.
- Incentivization of projects with a focus on sustainability
- Incentivization of projects that also provide professional and educational training

Measuring the impact:

- Monitor any new schemes and alternatives to the standard tax incentive process across the first year of meetings
- Record new partnerships across participating States in connection to the creative industries

How to Implement It:

- Sound Diplomacy will provide initial introductions to key stakeholders in relevant state government departments for the DEC
- Organize initial meetings with representatives from relevant states to determine the possibility of a Working Group
- Organize a meeting with the Director of (and relevant team members) the Georgia Department of Economic Development to provide detail about the Working Group and propose that the DEC support the creation and management of the Working Group
- Set up an initial meeting with the whole group for 60 - 90 minutes online
- Agree an agenda for the initial meeting, introducing existing practices, raising any concerns about the incentives program and hear from others about their experiences
- Minute the meeting and share with members
- Agree on the agenda for the following meeting and arrange meetings to take place every quarter

Other Specifications:

- Invite representatives from any other states that begin similar tax incentive schemes
- Conduct an audit concerning the results and benefits that the Georgia Entertainment Investment has had on local communities
- Share and create case studies on the value and economic impact that tax credits have had since they began
- Develop and regularly update the data to support the continuation of tax credits in the state

Recommendation 2: Provide Focused and Structured Networking Opportunities for DeKalb County's Creative Industries

Year: 2

Initiated by: DeKalb Entertainment Commission and relevant partners

Cost Estimate: \$3,500 per event / **Itemized:** \$500 for venue hire / \$500 for refreshments / \$1,000 for guest speaker, fees and travel / \$500 for measuring performance tools such as survey development / \$1,000 social media ads and promotion

Establish a professional development networking series aimed at creative industry professionals and aspiring professionals. Use the expertise and existing networks of the DEC and its partners to organize and oversee networking events for the creative industries in the county. Networking events can empower the professional community through communication and collaboration. A goal of this work would be to encourage participants to share opportunities for cross-sector work across the film, music and digital entertainment industries, and resources to increase awareness and partnerships. This will ensure that the industries support each other, for example through film producers hiring local composers for a score, which in turn will develop the local supply chain, and improve communication between film studios and digital entertainment workers as stakeholders highlighted this as an issue.

Strengthen communication between the entertainment industry and various sectors that frequently work together to help develop DeKalb's ecosystem by ensuring that it can sustain itself through local recruitment and talent acquisition.

Measuring the impact:

- Commission an economic analysis report to estimate economic impact and industry changes
- Survey attendees at the end of the first networking session and again after 6 months to measure the impact of events, and whether any new collaborations have been developed from them
- Register and record number of people participating with each, monitoring whether there are differences in attendance numbers, or types of attendees across various locations

How to Implement It:

- Work with Decide DeKalb community and business engagement initiatives to include entertainment industry
- Organize one networking event every month. Invite stakeholders from the film, music and digital entertainment industries to each one. Include workshops during meetings

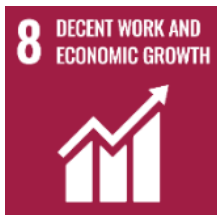
that focus on different aspects of these industries to support the development of professionalization within them.

- Host the initial event in one of Decatur's cultural spaces with the hire fee and refreshments paid for by the DEC
- After the event, conduct a survey or inventory throughout DeKalb's creative industries to gain knowledge regarding the auxiliary industries that the film, music, and digital entertainment sectors most often collaborate with
- Include a section in the survey that gathers information regarding the accessibility and availability of said industries in DeKalb County
- At the first event ask attendees to provide a space for the next, and so on, ensuring that each is held in a different venue, in a different location of the county so as to make access equitable for all
- Work with partners in each city government cultural (or related) department across the county to promote the series
- Invite representatives from city government (licensing, culture, economic development) to attend, to facilitate conversations between local government and the creative industries
- Invite members of the auxiliary industries revealed in the abovementioned survey to continue to cultivate strategic links and contribute to the economic viability of the film, music and digital entertainment industries
- Create an online and in-print promotional campaign that is shared on social media, and amongst businesses, productions and workers. Include clear information about dates, times, locations, guest speakers, and what they can expect from sessions

Other Specifications:

- The series should be available to all entertainment industry professionals, entrepreneurs and business owners in the local entertainment ecosystem and prioritize groups who are currently underrepresented in the industry
- Plan a set of guest talks and workshops, and themed sessions for networking meetings
- While this would be implemented by the DEC, stakeholders and community members should be encouraged and empowered to participate in the management and shaping of the series

SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:



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

Target 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value

Target 8.6: By 2020, substantially reduce the proportion of youth not in employment, education or training

BEST PRACTICE CASE STUDY - BALANCED BREAKFAST, SAN FRANCISCO, CALIFORNIA, US¹³⁰

What is it: Founded by Stefan Aronsen and Andy Freeman in San Francisco. Balanced Breakfast (BB) organizes musicians and other music industry professionals for breakfast meetups, often weekly or monthly. Participants get the chance to talk about actions they could employ that would help the local music scene. During meetings participants also discuss the challenges they face on a daily basis and then look for unified solutions in a welcoming community environment.

Who Is Responsible? Balanced Breakfast is a private organization with community partners that provide sponsorship (such as festivals, breweries, and the City of San Francisco)¹³¹

What has it done: The BB community has grown to become a multi-city network with meetups now happening in 27 US cities, including Atlanta, Oakland, San Jose, Santa Cruz, Sacramento, Los Angeles, San Diego, Nashville, Denver, Austin, Boston, Portland and Seattle. While the primary goal of BB activity is to build a strong entertainment industry community, such a supportive collective mechanism also helps launch individual artists' careers, find innovative ways to market and promote

¹³⁰ Balanced Breakfast (2023)

¹³¹ Ibid.

themselves and at the same time strengthens the local music community and scene as a whole.

Relevance to DeKalb: Opportunities for the film, music and digital entertainment ecosystems to have more contact with each other increases internal and external knowledge of how the sector works, strengthens the industry, creates opportunities for collaboration and skills development, and encourages growth of self-sufficient industries. Lessons can be learned from existing networking sessions to see how they can expand, that there is growing demand for opportunities such as these, and that it helps strengthen the local supply chain.

Recommendation 3: Sponsor an Apprenticeship Program for Youth and Young Professionals

Year: 1

Initiated by: DeKalb Entertainment Commission / **Supported by:** County-wide film, music and digital entertainment businesses and professionals

Cost Estimate: \$75,000 annually / **Itemized:** \$10,000 for each participating business initially (six / year) / \$15,000 for DEC administrative costs (including website updating, administrative work, networking meeting expenses, marketing)

Advertise and initiate a sponsorship scheme that incentivizes local creative businesses and professionals to offer apprenticeships as part of a county-wide program. Incentives provided by the DEC to participating businesses could include:

- Incentives for those that sign up on a yearly basis
- Fixed grant to participating businesses to cover costs to provide income to apprentices
- Promotion of the business across DeKalb and partners' social media platforms

- One workshop held every six months led by participating businesses and their apprentices, creating an opportunity for cross-collaboration and hiring apprentices within the network after their training has ended

This can be an effective way to enhance and build on the momentum of the competitive advantage that DeKalb has in its renowned digital entertainment education provision, by advocating for progression from education to careers. It would also work towards solving issues raised by stakeholders that there is a need for a more experienced workforce in the film industry, and more robust programs for creating career pipelines connected to all aspects of the music industry.

Apprenticeships would allow aspiring creative professionals the chance to work with experts and gain the knowledge and skills needed to sustain their sector, provide access to entertainment business skills development for DeKalb's non-performance based professionals, enable interaction and knowledge sharing between professionals, mentors and participants, and increase the number of film, music and digital entertainment industry professionals through education and talent retention and attraction.

Part of this recommendation could be to support the development of a student production facility, deepening engagement with Decide DeKalb workforce initiatives and programs.

Measuring the impact:

- Keep track of the number of people signing up to be apprentices, and monitor their progress for 2-3 years after to see if they continue in the creative industries, and gain work in DeKalb
- Monitor the number of jobs available within the film, music and digital entertainment sectors and evaluate whether there is enough availability for those leaving apprenticeship programs, or whether the program creates extra demand for job creation
- Record the number of people signing up to be apprentices in the first 6 months of the program, and again every year to determine the demand for these opportunities, and increase the number of companies accordingly
- Record the number of businesses signing up to participate in the program in the first 6 months, and again every year following to determine the demand for apprentices, and monitor the types of roles that businesses need filling while increasing the number of offered apprentices accordingly

- Increase engagement with Decide DeKalb initiatives and programs, including Equity and Inclusion, Workforce Development, Business Retention and Expansion, and Economic Development

How to Implement It:

- Create an online information guide that sets out:
 - The types of apprenticeships businesses could offer and requirements for businesses that are participating, such as having diversity, inclusion and sustainability as part of the company ethos
 - The ages of apprentices the program aims to recruit (from 16+)
 - The purpose of the program and what DeKalb aims to achieve in partnership with the local creative business community
 - The timescale that should be available (1 month, 3 months and 6 months)
 - The working hours (part- or full time)
 - What incentives businesses can access by participating
 - Explanation that the program will refresh every year and allow new businesses to join
 - Template contracts for businesses to use with apprentices
 - The role of the DEC as an administrator, promoter and evaluator only - it will be the responsibility of businesses and interested apprentices to contact each other, review applications and arrange
 - Evaluation criteria to ensure consistency across apprenticeships
 - An agreement that participating businesses will follow equity and diversity, and ethical working guidelines, and fair pay as determined by the County
- Use Sound Diplomacy's mapping database, existing networks, social media and industry contacts to promote the program with local film, music and digital entertainment businesses to encourage them to sign up to be part of the scheme
- Select 2 businesses from each sector (film, music, and digital entertainment) to take part in 6 month pilot scheme
- List all participating businesses on the DEC website by location, discipline and length of apprenticeship, with contact details for interested parties to get in touch directly with the business, and promote across the County and in educational institutions to market the opportunity
- List all available apprenticeships on the DEC website and the websites of relevant county and city departments and organizations, as well as that of partnering organizations and agencies

Other Specifications:

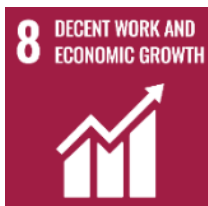
- Review at the end of the first 6 months to determine any changes, extra support or successes, and then every following year on an annual basis
- Increase the number of apprenticeships available and businesses participating after the first 6 months

SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:



Target 4.3: By 2030, ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university

Target 4.5: By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations



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

Target 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value

Target 8.6: By 2020, substantially reduce the proportion of youth not in employment, education or training

BEST PRACTICE CASE STUDY- MUSIC APPRENTICESHIP SCHEME - UK¹³²

¹³² UK Music (2021a)

What Is It: UK Music's Apprenticeship scheme "aims to support music employers to hire committed and passionate apprentices and help get talented people into paid jobs in the industry."¹³³ Apprenticeship categories range from live events and promotion to creative and digital media. While each apprenticeship is uniquely designed according to the learning goals of the apprentice and the needs of the employer, UK Music provides resources for organizations and companies interested in gaining apprentices, such as advice on recruiting apprentices, help crafting apprenticeships, and training for the role of the partnering organization in instructing apprentices.

The Apprenticeship scheme is funded through the Apprenticeship Levy which requires employers with incomes totaling more than £3 million per year to partially fund the program. Large employers who pay the levy can access part of their levy funds to off-set the cost of hiring apprentices, smaller businesses pay just 5% of the cost of an apprenticeship and the government pays the rest from the levy.¹³⁴

Who is Responsible: UK Music, UK Government.

What Has It Done: UK Music's Apprenticeship scheme has successfully created and fulfilled apprenticeships in international promotion, music business, branding, communications, and digital media. Apprentices have gone on to gain full-time positions in partnering companies and elsewhere, stating that the program played a large role in the cultivation of skills needed to work in the creative industries.¹³⁵

Funding for apprenticeships has doubled in the last decade thanks to the Apprenticeship Levy, allowing more companies the ability to participate in the program and train future industry professionals.¹³⁶

Lesson for DeKalb: Apprenticeships give aspiring industry professionals paid opportunities to train under field experts, thus sustaining the creative industries for future generations. Funding through public and private sources helps offset costs for small businesses, which encourages participation. An apprentice program is especially applicable to the Festivals and Events subsector's need to invest and

¹³³ Ibid.

¹³⁴ Department of Education (2019)

¹³⁵ UK Music (2021b)

¹³⁶ Department of Education (2019)

cultivate new generations of event planners and organizers but would be beneficial to all sub sectors if participating. An apprentice program done in partnership with the DEC could leverage a small investment into a large return for participants and DeKalb County.

Recommendation 4: Sponsor Artist Development Opportunities

Year: 4

Initiated by: DeKalb Entertainment Commission / **Supported by:** DeKalb County Convention and Visitors Bureau

Cost Estimate: \$55,000 annually / **Itemized:** Up to \$500 per conference (serving 50 / year) / \$5,000 towards marketing campaign

Allocate funding to sponsor emerging and up-and-coming creators in the entertainment field to attend professional conventions and conferences to increase support for career development and fill a gap in the industry that is perceived by local stakeholders.

Eligible events would include conferences taking place both in Georgia and nationally, with a personal allowance of up to \$500 provided to applicants, the fee could be used to cover ticket costs and towards travel (if required). The goal would be to support new careers in entertainment, continuing the career pathway from those taking part in DeKalb's successful digital entertainment education and other programs and to gain new insights and innovations into what is happening in the industry in other areas so that attendees can bring that knowledge back to DeKalb and be part of the continued growth of the County's entertainment sector.

Measuring the impact:

- Record any changes in local creators being hired by businesses, production companies, events, etc.

- Monitor any change in revenue and employment in the local film, music and digital ecosystems

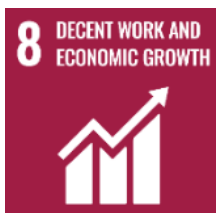
How to Implement It:

- Meet with the DeKalb County Convention and Visitors Bureau, and the Georgia Association of Convention and Visitors Bureaus to define the program and the support each entity could provide
- Compile a list of all relevant conventions and conferences taking place across Georgia, and through contacts in other states, a list of those taking place elsewhere in the US
- Work together to determine what a qualifying event is, who would be eligible, how they would apply, and what criteria creators must follow to be applicable (e.g they have to have taken part in a digital entertainment education program in DeKalb, or they are just starting to build a portfolio and need support to develop)
- Promote this initiative across the county, sharing it with city governments through mailers and conversations in DeKalb to raise awareness
- Post a list of known conferences in the state and further afield on the DEC and Decide DeKalb websites, and offer an 'open call' option for creators to request sponsorship for events they discover

Other Specifications:

- Create a clear set of guidelines for participants to ensure consistency
- Consider expanding this initiative to include other creative industries, such as the film and music sectors
- Explore the creation of an artist residency and exchange program

SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:



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



Target 11.4: Strengthen efforts to protect and safeguard the world's cultural and natural heritage

5.2 Improve and Streamline Industry Infrastructure

Any industry requires efficient, clear and supportive regulatory processes and resources to develop in a resilient and sustainable manner. Sound Diplomacy's research revealed several improvements that would improve conditions for the film, music and digital entertainment industries. These include access to funding, permitting structures, jurisdictional mapping system improvements, and information management across websites and online application portals.

Special Administrative Permits are handled by DeKalb County's Department of Recreation, Parks, and Cultural Affairs. While information on the Special Events website is clear, accessible, and includes a timeline and next steps after submission, the actual application is the only place with detailed information regarding the necessary components for applying. Additionally, the DEC has a jurisdictional map to help scouts find locations for film production and connect with relevant contacts, but an integrated ecosystem map is necessary in order to provide and promote related resources for all of DeKalb's entertainment and creative industries.

Entertainment-friendly policies can improve the functionality of the industry and all related sectors. Noise policies, liquor permits, film ordinances, special administrative permits, and safety and sustainability guidelines all contribute to the health and success of the entertainment ecosystem. However, it is important that information is presented clearly and efficiently, and that the policies are in sync with the needs of the current industry landscape.

Beginning with noise and liquor permits and policies, the comparative analysis showed inconsistencies between cities and specifically that the cities of Clarkston, Decatur, Doraville, Stonecrest, Lithonia and Stone Mountain lack these regulations. Chapter 27-762 of DeKalb County's Code of Ordinances, otherwise known as DeKalb's "Noise Ordinance," describes stipulations on noise in residences, industrial, commercial, and mixed-use areas,¹³⁷ and Article

¹³⁷ DeKalb County (2010)

XIV, otherwise known as DeKalb’s “Film Ordinance,” was created to help facilitate film production while protecting the interests of DeKalb residents.¹³⁸

Some of the same communication discrepancies occur across various county websites that contain guidance on liquor licensing. While some forms are available on the Department of Finance’s website, links to the “License Application” and “License Check-Off List” on the Finance Department’s website are frozen or inoperable.¹³⁹ Information is also available on the Planning and Sustainability website, but instructions for a new liquor license are difficult to decipher,¹⁴⁰ presenting issues with the approach to and communication around licensing online. While these spaces provide important guidance to live entertainment professionals, improving policy language can make it easier for those coming from other industries to understand the necessary steps.

The availability and confines surrounding Special Administrative Permits, which provide relief from the stipulations of the noise ordinance for a short period of time, is another element of the ecosystem that requires improvement. While these permits are made available by DeKalb County’s sound control administrator, the period of time granted for noise ordinance exceptions cannot exceed more than 15 days per year. This can be restrictive for live performance venues that seek more sound exceptions, and the requirement of applicants to apply for each occurrence puts a heavy regulatory burden on these spaces.

All in all, the music and digital entertainment industries in particular require county-wide support in order to become more successful.

Recommendation 5: Review Permitting and Licensing Processes

Year: 3

Initiated by: Decide DeKalb / **Supported by:** DEC, Department of Recreation, Parks, and Cultural Affairs

Cost Estimate: Up to \$10,000 - \$30,000 / **Itemized:** \$10,000 - \$30,000 for hire of marketing firm to package, design and promote easy to use process

¹³⁸ DeKalb County (2016)

¹³⁹ DeKalb County (2019a)

¹⁴⁰ DeKalb County (2019b)

Ease the processes to request licenses and permits needed for entertainment-related activities. Particular focus should be placed on noise ordinances and liquor licensing as currently the existence and consistency of each differ city to city across the county. Communication and instructions on how to apply and what the requirements are for these regulations should be coordinated by Decide DeKalb. Simplifying language and communication can encourage more live entertainment activities. Considerations would include:

- Reviewing all permits and processes relevant to the entertainment industries.
- Advocating for a sound exceedance permit with a tiered approach to streamline processing and ease the regulatory burden for repeat applicants.
- Simplifying the communication around liquor licensing through more accessible explanations of policies for all relevant licenses and permits.
- Creating and updating event calendars, reminders and documents to keep all relevant partners organized and informed ensuring effective management of county services.
- Creating a digital handbook to summarize all permit processes

Measuring the impact:

- Monitor any change in the number of applications for permits in the county
- Monitor any change in the number of hours spent by multiple departments on responses to inquiries through a staff survey
- Through conversations with industry members, monitor any change in the number of hours applicants spend on bureaucratic processes
- Use events data to track economic impact data
- Work with Film App developers to leverage new reports upgrades to gather and analyze permit data and survey results

How to Implement It:

- Gather industry and county stakeholders to determine what information is necessary for comprehensive administrative processes
- Meet with representatives from the Department of Recreation, Parks, and Cultural Affairs to review the special administrative permitting process and review the current noise ordinance code, meeting with the cities in the county to discuss the possibility of implementing a sound exceedance permit
- Work with Decide DeKalb Diversity and Inclusion initiatives to increase diversity in entertainment businesses through improved equitable access

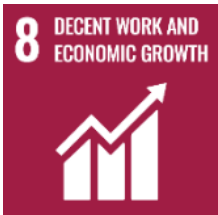

- Review current expectations for diversity, inclusion and sustainability in existing regulations
- Advocate to add event permits system to online film permit platform
- Using Sound Diplomacy’s comparative analysis, review which cities have regulations and determine a plan to ensure that all cities have the same policies in place
- Create a proposal that advocates for a tiered sound exceedance permit that is unified across cities in the county, with additional application requirements including:
 - A site plan
 - Performance area layout and sound orientation
 - A noise model performed by an acoustical engineer and any resulting noise-mitigating design features
 - Proximity to residential dwellings
 - Sound level limits should remain at 85 decibels, but include stipulations surrounding how long each event can last
 - Agree on official measurement techniques, from meter type to measurement location. These techniques must be clearly communicated with businesses that are known to be noise sources (venues, restaurants, film productions) as well as residents living nearby.
- Create a digital handbook or one-pager that explains the different components of the application processes with best practice examples and successful applications to save time processing applications in the long-run and give applicants illustrations that help as they develop the required materials.

Other Specifications:

- Allow for considerations regarding noise levels, built structures, road blockage, and fire safety in the Handbook as well as guidance for not only contacting relevant personnel, but what information is required to complete the application process
- Include best practices for equity and inclusion, and sustainability in addition to permits and procedures in the Handbook as well as all relevant policies and logistical considerations
- The [Sustainable Environment Education Series \(SEEDS\) Green Production Guide](#)¹⁴¹ (or a similar guide DeKalb wants to adhere to) could also be promoted in this handbook
- Conduct regular assessments to account for the efficacy of the Handbook and what further information needs to be included

SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:

¹⁴¹ Producers Guild of America (2022)

	<p>Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services</p>
	<p>Target 11.3: By 2030, enhance inclusive and sustainable urbanization and capacity for participatory, integrated and sustainable human settlement planning and management in all countries</p>

BEST PRACTICE CASE STUDY - OUTDOOR SPECIAL EVENT GUIDE - ASHEVILLE, NC¹⁴²

What Is It: Asheville’s special event guide provides information regarding the process of successfully applying for a special event permit. The guide includes:

- An explanation of when special event permits are required
- Overview of city ordinances and policies
- A list of fees and charges typically associated with special event permits
- The cancellation policy
- Event site logistics and considerations
- An explanation of Asheville’s “Good Neighbor Policy” which encourages organizers to consider the impact that events may have on the surrounding area
- Considerations for vendors and contractors
- Public safety guidance
- Application and permit information

¹⁴² City of Asheville (2021b)

- An appendix which discusses other relevant details

Who is responsible: The City of Asheville's Department of Community and Regional Entertainment Facilities

What has it done: Since its development, the special event guide has remained a living document which shifts according to changes in policies and procedures to always have the most up to date information. The guide has contributed to the general perception of Asheville as a destination for music and entertainment that hosts over 300 special events and filming projects per year.

Lesson for DeKalb: Creating a special event guide provides a roadmap for current, new, and aspiring event organizers to follow as they plan throughout the year. It not only includes information about the event permit itself, but also other considerations that are necessary for ensuring the event's efficacy. DeKalb could develop its own version of the guide to include the film, music, and digital entertainment sectors and encourage each city within the county or region to follow suit.

Recommendation 6: Improve the DeKalb Cultural Inventory with a Full Online Ecosystem Map

Year: 3

Initiated by: DeKalb Entertainment Commission / **Supported by:** Local creative industry stakeholders

Cost Estimate: \$10,000 to design and implement and then up to \$5,000 annually / **Itemized:** Initial costs of \$10,000 in design and website updates / \$5,000 annually for regular updates and maintenance

Undergo a comprehensive review and update of the DeKalb Cultural Inventory to create an interactive online map that spotlights all physical assets that are part of and connected to the film, music and digital entertainment industries. This would be based on Sound Diplomacy's

mapping, but include all assets already listed in the existing Cultural Inventory. This is a key opportunity to promote the areas of DeKalb's entertainment ecosystem that are particularly successful, standing out against competition in other regions, and grow the economic viability by catering to and promoting multiple sectors. The map would replicate that of Sound Diplomacy's for DeKalb, with categorization of assets, clear information about each asset including the address and contact information, and be updated on a regular basis. An online form should be embedded in the DEC website next to the map so that stakeholders and residents can be part of the ownership and submit new spaces and their own contact information to keep it relevant.

Measuring the impact:

- With every update, record the number of assets mapped to measure any change
- Monitor any change in collaborations and/or investment across sectors through greater awareness of industries other than film in DeKalb

How to Implement It:

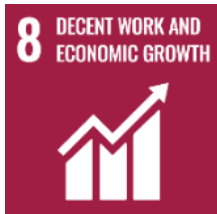
- Perform an audit on the current cultural infrastructure map and data to ensure that all contact information and resources are up to date
- Work with locations partners to set up new locations mapping system
- Work with FilmApp developers to improve its internal locations system
- Leverage assets map to highlight local industry businesses
- Work with industry vendor marketers (i.e Oz Publishing) to ensure local county vendors and resources are included
- Explore platforms to embed the map onto the DEC website, this could be effective with a simple Google map with each asset added to it
- Include information on all creative ecosystems, such as film (studios, sound engineers, editors, etc.), music (venues, recording studios, composers, music shops, etc.), digital entertainment (specialized consultants, studios, etc.).

Other Specifications:

- Create a promotional campaign of the map to ensure that internal and external stakeholders are aware of and use the map to create new contacts, and collaborate
- Utilize Sound Diplomacy's mapping database as a baseline of this data in order to broaden the scope of the current cultural infrastructure database
- Provide an online form for stakeholders to submit details of their spaces/businesses to ensure that it is a living map that is regularly updated

- Constantly update the map in order to ensure that the most current information is available
- Advocate for and lead on a state-wide expansion, partnering with Georgia Music Partners and the Georgia Film Office

SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:



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

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

5.3 Utilize Strategic and Marketing Tools to Develop and Promote DeKalb's Entertainment Industry

An entertainment industry as storied and vibrant as DeKalb's could utilize a successful tourism and marketing campaign for more exposure for local businesses while also gaining the attention of larger businesses looking to relocate or establish satellite locations. Boosting what already exists and promoting it county- and state-wide will work to give DeKalb's film, music and digital entertainment industries the competitive advantage against other entertainment hubs both locally, and beyond.

Both the SWOT analysis and regulatory assessment indicate that the creative industries and programs related to them do not have enough visibility. This can be attributed in part to the DEC's website design which disproportionately highlights the film industry in comparison to the other sectors, and a lack of engagement with entertainment consumers. This contributes to sectors working in silos, which makes collaborations difficult. Making the website more user-friendly, intuitive, and efficient, and dedicated promotional campaigns and partnerships could help the individual sectors gain visibility while encouraging increased partnership between them.

Furthermore, Sound Diplomacy's mapping revealed that venue infrastructure makes up 19% of music-related assets, of which 70% are dedicated live music venues. This implies that there is a strength in the local music ecosystem with venues that supply proper technical and quality requirements for music performers. However, stakeholders feel that there is a lack of appreciation for local venues and perceive a lack of variety in the size of venues. Therefore, promotion is required to ensure these spaces continue to grow, to showcase what exists, and to attract more music-related businesses and audiences.

Stakeholders also pointed to a perception that the industry suffers from an unfavorable public image, since filming has affected some neighborhoods and therefore impacted negatively on locals. Our research indicates that community outreach and initiatives are needed to encourage more positive residential experiences with the entertainment industries.

Recommendation 7: Create a DeKalb Film, Music and Digital Entertainment Marketing Campaign

Year: 3

Initiated by: Discover DeKalb and DeKalb Entertainment Commission, and DeKalb County CVBs

Cost Estimate: \$60,000 - \$100,000 / **Itemized:** \$30,000 for marketing firm strategy for campaign design / \$30,000 - \$70,000 for implementation: printed materials, ad buys, graphic design, collateral and merchandising

Develop a marketing campaign that focuses equally on all sectors to improve visibility and promote constituent and resident awareness of the activity of the creative industries in the county, and further strengthen the industries through strategic planning. A marketing strategy should be created in connection to the DeKalb County, Georgia Film, Music & Digital Entertainment - Five-Year Strategic Plan for Economic Development 2017—2022 and any future updates made to it. The purpose of the campaign and accompanying strategy would be to:

- Develop a strong identity for DeKalb County as a desirable destination for film, music and digital entertainment production
- Identify, promote and enhance exposure of the film, music and digital entertainment industries and the workers and sub sectors within them internally and externally
- Internally improve the image of the creative sector among residents

- Externally promote the sector, the assets, resources and attract new businesses and work
- Strive for workforce development within these industries and connected ecosystems
- Attract new investment into the county
- Promote activities and events to new and existing audiences (national and international)
- Support any tourism development campaigns taking place in DeKalb
- Develop DeKalb's brand as a hub for creative and cultural entertainment and business

Measuring the impact:

- Record any new promotion or showcasing of DeKalb County and its creative industries on the social media, articles, blogs or newsletters of external companies
- Monitor any increase in indirect spending in the county
- Monitor any change in businesses, production companies, etc. using DeKalb as the location for their work

How to Implement It:

- Convene a roundtable with the DeKalb Convention and Visitors Bureau to determine a plan for developing the strategy, with a list of goals for what the strategy aims to achieve, what the expected outcomes are, and what DeKalb's brand and budget is
- Work with tourism offices to increase awareness of arts and entertainment events and programs
- Engage with Decide DeKalb programs and initiatives to include the entertainment industry
- Implement targeted marketing campaigns, utilizing social media, and industry events to raise awareness and attract production companies
- Hire a cultural consultancy to create a marketing strategy to support the campaign, ensuring that it is embedded across all relevant departments in DeKalb County
- Once the marketing consultant has delivered the strategy, the DEC will need to appoint someone to implement it internally (this would be a marketing coordinator)
- Draft a brand awareness campaign to create resources for networking events, career days, open sponsorship opportunities in the county, and audience development
- Implement the strategy with the support of other agencies and sector stakeholders
- Assess the results periodically of the strategy to adjust and update it accordingly

Other Specifications:

- Collaboration between all applicable parties is necessary for the successful implementation of this campaign as well as community stakeholders and small business owners who stand to benefit from it
- Create an engaging and interactive factsheet about the creative industries, celebrating their impact and highlighting the County's success stories. Keep this regularly updated

SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:



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

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



Target 11.4: Strengthen efforts to protect and safeguard the world's cultural and natural heritage

BEST PRACTICE CASE STUDY - ARTS AND CULTURE TOURISM STRATEGY, 2025 - SOUTH AUSTRALIA¹⁴³

What Is It: The South Australia Arts and Tourism Strategy, 2025 is a plan developed through collaboration with the creative industries and the South Australian Tourism Commission to both recognize the value of the arts and incorporate it into the tourism sector in a substantial way. Recognizing the impact of the various art exhibits, events, and

¹⁴³ Government of South Australia (2021a)

festivals, the South Australian Tourism Commission looked for ways to bolster the artistic community.

The Strategy also takes as its mission to recover tourist revenue, which suffered a significant drop in the wake of the COVID-19 pandemic from \$1.4 billion to \$700 million. The Commission views investment in the arts as a way to restore the industry fiscally by 2025.

Other goals include:

- Strengthening arts and cultural tourism
- Promoting year-round arts engagement
- Empowering the sector to develop world-renowned tourism offerings
- Championing Aboriginal culture
- Measuring, amplifying, and valuing South Australia's artistic offerings
- Supporting the arts and cultural sector
- Supporting the South Australian visitor economy

Who is responsible: The South Australian Tourism Commission.

What has it done: In 2021, domestic tourism still fell short of projections, but regional tourism saw exponential growth as South Australia embraced local holidays. Visitor expenditure also saw a major improvement from the prior year. Since the new strategy allowed for more investment in the cultural sector, the Commission was able to offer support towards both existing and new events.¹⁴⁴

Lesson for DeKalb: Creating a cultural tourism strategy could put DeKalb on the path to cultivating more revenue from entertainment-related businesses. Like South Australia, specific cultural considerations could be made to develop new events surrounding DeKalb's varied culture and the ways that this culture contributes to DeKalb's overall history and heritage.

Recommendation 8: Make Improvements to the DeKalb Entertainment Commission Website

Year: 2

¹⁴⁴ Government of South Australia (2021b)

Initiated by: DeKalb Entertainment Commission

Cost Estimate: \$70,000 - \$100,000 for initial design and development with \$40,000 - \$50,000 annually for ongoing updated maintenance costs and marketing / **Itemized:** \$40,000 setup and design costs / \$30,000 per year on SEO (dependent on desired outcome) / Content development and marketing \$30,000 / Ongoing updates and maintenance costs \$10,000 - \$20,000 / year

Refine the DEC's website to adequately represent the work of the DEC across sectors, and provide information to residents and visitors looking to participate in the industry in a variety of ways to help expand the DEC's reach and efficacy throughout the local community and region. Prioritize developments to the website to be optimized for all access needs (ie. for people with vision impairments).

Ensure that the following aspects are included and clearly displayed on the website:

- The proposed creative industries network (see recommendation 2)
- Apprenticeship opportunities (see recommendation 3)
- Cultural Inventory Map (and proposed improvements to it - see recommendation 9)

Measuring the impact:

- Record any change in production companies working with businesses and accessing resources
- Monitor visitor numbers to online databases and the website

How to Implement It:

- Hire a website developer and User Experience consultant to assess the feasibility and usability of the current DEC website
- Include all resources related to the creative industries in a user-friendly and accessible format
- Technical capabilities to increase site visitors should be configured into the budget in order to assist the DEC with reaching companies that are unaware of the opportunities available in DeKalb
- Complete upgrades to the website with features to simplify film permit processes, improve location management initiatives and promote local industry resources
- Work with Equity Manager to leverage inclusion and diversity programs

- Update website with permit checklists and manuals

Other Specifications:

- It is essential that the needs of smaller business and production companies be considered in website redesign to give local residents the ability to benefit from DeKalb's resources
- In addition to the entertainment industry, the website should also contain information for visitors and tourists seeking information about cultural events occurring across the county. The Discover DeKalb website should also include a link to this website and promote it
- Promote the website regularly to ensure that all stakeholders both local to DeKalb and outside of the county are aware of it.

SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:

	<p>Target 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services</p>
	<p>Target 9.1: Develop quality, reliable, sustainable and resilient infrastructure, including regional and transborder infrastructure, to support economic development and human well-being, with a focus on affordable and equitable access for all</p>
	<p>Target 11.4: Strengthen efforts to protect and safeguard the world's cultural and natural heritage</p>

Recommendation 9: Develop Strategic Partnerships to Promote DeKalb's Live Music and Entertainment Venues

Year: 4

Initiated by: DeKalb Entertainment Commission / **Supported by:** The National Independent Venue Association, Music Business Association and other identified partners

Cost Estimate: Up to \$128,000 (dependent on chosen option) / **Itemized:** \$10,000 for venue member networking and informational events (\$2,500 / quarterly event) / \$40,000 for promotional campaign / \$10,000 for discretionary conference registration and travel / \$38,000 for showcase event (\$3,000 for venue, \$10,000 for artists booking, \$10,000 for production, \$5,000 for other event staff, \$10,000 for promotion) and \$10,000 - \$30,000 for the event calendar development, design, implementation and promotion.

Strengthen the presence of live music and entertainment venues in DeKalb County by cultivating existing external associations that engage with these spaces. To begin immediate promotion, the National Independent Venue Association (NIVA)¹⁴⁵ has members in every state of the US, undertaking significant lobbying efforts for and providing resources to the industry. To increase exposure for DeKalb County venues, promote the live music and entertainment scene and strengthen efforts taking place in the county, DeKalb could explore partnership opportunities with NIVA. The Music Business Association also already has established relationships in the state after hosting the first Music Biz Roadshow in downtown Atlanta (Fulton) in 2022. The Music Business Association is a membership organization that celebrates, promotes, and unifies the music industry through events, education and member collaborations across the world.¹⁴⁶ Reaching out to the organization to explore opportunities for DeKalb County could lead to unique and effective ways to showcase what the County has to offer, increase exposure of the existing businesses and develop long lasting relationships to strengthen the industry while supporting music business incubation and development.

Further opportunities to promote DeKalb's live music and entertainment sector include running a multi venue event or festival with partners that takes place across the county, showcasing talent from both the state and further afield in a variety of spaces to highlight the venues that are available in DeKalb. Including the Performing Arts Center would also promote the County-run venue that is felt by stakeholders to be underutilized. A showcase festival

¹⁴⁵ NIVA (2023)

¹⁴⁶ Music Business Association (2023a)

would increase awareness of venues across the whole of the county and engagement with them afterwards, this promotion would also help work towards improving appreciation for these venues, an aspect that stakeholders currently feel is missing. This will in turn help to create a competitive advantage for DeKalb's independent music venues against other regions in the state, and further afield.

A regularly updated events calendar hosted on the DEC website and promoted on social media and by local stakeholders (as suggested in recommendation 7) is also an effective way to ensure continuous promotion of live entertainment spaces.

Measuring the impact:

- Monitor any changes in direct partnerships between DeKalb County venues and other organizations
- Measure any increase in investment into the local music industry
- Monitor any increase in members of NIVA from DeKalb County

How to Implement It:

- Sound Diplomacy will introduce team members at DeKalb Entertainment Commission to a lead contact at NIVA and the Music Business Association
- Put a call out to local venues to identify which ones are already members of NIVA
- Host a NIVA Informational Meeting with NIVA officials and local existing members to encourage other venues to become members
- Organize a meeting with NIVA to initiate an ongoing relationship and discuss how to work together to grow and promote venues in DeKalb County
- Using Sound Diplomacy's mapping, identify suitable venues to participate in a multi-venue festival
- Select a weekend for the festival, with events taking place during the day and into the night
- Provide participating venues with the appropriate licenses in order to be part of the festival
- Ensure participating venues fulfill a quota to programme at least 50% of local artists/bands, and with particular attention to ensuring musicians and programming represent the diversity of the county
- Provide venues with promotional materials for the festival

Other Specifications:

- Work with NIVA to create a promotional campaign, gain a regularly updated list of member venues in the county and engage with each to ensure that the DEC is kept abreast of any challenges and opportunities in the industry
- Consider becoming a host for the annual NIVA Conference (the 2023 edition will take place in Washington D.C in July 2023)
- Send a representative from the DEC to the NIVA Conference to ensure that the Commission is aware of all opportunities within the independent venue field, and how best to support DeKalb's venues
- Identify other potential associations and organizations to partner with to develop this initiative further

SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:



Target 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value



Target 11.4: Strengthen efforts to protect and safeguard the world's cultural and natural heritage

Recommendation 10: Increase Engagement with Local Audiences

Year: 2 & 4

Initiated by: DeKalb Entertainment Commission / **Supported by:** DeKalb County venues, live entertainment producers and organizations

Cost Estimate: \$30,000 - \$50,000 every two years / **Itemized** \$30,000 - \$50,000 for marketing material creation, promotion, advertising and measuring

Create an audience development ticket scheme with DeKalb venues, organizations and event producers that promotes the local offer while providing new and existing audiences with affordable ways to engage with DeKalb's live entertainment sector. This would focus on increasing engagement with young people, as stakeholders raised a lack of youth initiatives in the County, and increase awareness of DeKalb's homegrown offer with all residents. The scheme would involve providing tickets for a nominal fee (\$3-£5) to all 16-25 year old residents and a 50% discount for other residents on select events (with a cap on how many are available per event - to be determined with the participating venue/event organizer).

The aim of the scheme will be to reach new audiences, increase the number of people attending events, increase attendance among young people, and promote the live entertainment scene in DeKalb. It should be available to those living within DeKalb County through discount codes, with reduced price tickets provided to those living next to large scale events/festivals that might be impacted by road closures, increased visitor numbers, etc. Providing special and affordable discounts for residents to take part in culture in this way works as a mediator between the creative industries and local communities for any upheaval or negative impact that events may have in their city.

Measuring the impact:

- Monitor any changes in local participation in live entertainment events in the county that aren't part of the scheme
- Measure an increase in the number of visitors to events and festivals
- See an increase in the number of people following the social media accounts of the DEC and DeKalb's venues

How to Implement It:

- Using existing networks, contacts and Sound Diplomacy's mapping database, identify potential partners in local venues, organizations and event producers.
- Organize a roundtable meeting with all those identified to discuss the scheme and gain insight into what they would be able to offer, and what they feel audiences would respond to most.
- Create a tiered scheme that concentrates on different demographics/groups - cheap tickets for 16 - 25 year olds; discount for residents over the age of 25 with proof of address.

- Create a special webpage within the DEC website that can be linked to from participating venues that promotes and controls booking for eligible events. This way the discount can be automatically applied and is equitable as all residents have access to the discount.
- Sell these on a first come first serve basis, but ensure there is a diverse range of programming on offer and separate ticket booking links for those for 16-25 year olds, and the discounted rate so that data can be collected on how effective the scheme is across these groups
- Agree terms for the scheme - e.g, each venue/festival provides a limited number of tickets to the DEC in exchange for promoting said events.

Include the Following Specifications:

- Ensure that independent and grassroots organizations form the greatest proportion of events on offer so as to promote and strengthen their activities

SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:



Target 11.4: Strengthen efforts to protect and safeguard the world's cultural and natural heritage

Recommendation 11: Recruit Additional Marketing, Implementation, and Developmental Support Staff to Realize Recommendations and Ensure Long-Term Sustainability

Year: 1

Initiated by: DeKalb Entertainment Commission / **Supported by:** Decide DeKalb

Cost Estimate: \$45,000 - \$65,000 for managers ; \$10,000 - \$25,000 for interns and temporary staff

Recruit and hire developmental and support staff for strategy implementation, engaging with Decide DeKalb economic development initiatives and programs to ensure that all work is aligned with the wider strategic objectives of the County.

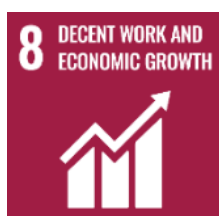
Measuring the impact:

- Implementation and measurement of recommendations listed within this report

How to Implement It:

- Hire support staff to manage locations, marketing and social media support, assist with film permit management and administrative support to assist with management of programs, events, data analysis and reports
- Work with local colleges, the DeKalb Technical College and the County Schools District and other partners to hire local interns and temporary support
- Work with Decide DeKalb programs focused on targeted industries to provide support specifically geared towards each of the three represented sectors - film, music and digital entertainment - to create opportunities and promote growth in each sector

SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:



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

Target 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value

Target 8.6: By 2020, substantially reduce the proportion of youth not in employment, education or training

6. Implementation Timeline

Table 6. Implementation Timeline

	Year 1	Year 2	Year 3	Year 4	Year 5
Increase Resilience Across the Film, Music and Digital Entertainment Industries					
1. Support Partners to Create a Best Practice State and National Workshop Group to Improve Tax Credits to Attract and Retain Talent					
2. Provide Focused and Structured Networking Opportunities for DeKalb County's Creative Industries					
3. Sponsor an Apprenticeship Program for Youth and Young Professionals					
4. Sponsor Artist Development Opportunities					
Improve and Streamline Industry Infrastructure					
5. Review Permitting and Licensing Processes					
6. Improve the DeKalb Cultural Inventory with a Full Online Ecosystem Map					

	Year 1	Year 2	Year 3	Year 4	Year 5
Utilize Strategic and Marketing Tools to Develop and Promote DeKalb's Entertainment Industry					
7. Create a DeKalb Film, Music and Digital Entertainment Marketing Campaign					
8. Make Improvements to the DeKalb Entertainment Commission Website					
9. Develop Strategic Partnerships to Promote DeKalb's Live Music and Entertainment Venues					
10. Increase Engagement with Local Audiences					
11. Recruit Additional Marketing, Implementation and Developmental Support Staff to Realize Recommendations and Ensure Long-Term Sustainability					

7. Conclusion

DeKalb County and its stakeholders have individual characteristics, unique cultures, and great enthusiasm for the growing film, music, and digital entertainment industries across the region which is evidenced by the tangible and intellectual resources that are directed towards the sectors and a booming entertainment industry. The region benefits from award-winning arts education provided by the DeKalb County Schools District. Additionally, production companies looking to benefit from the State's tax incentives encounter streamlined permitting processes throughout the county and the infrastructural support of the DEC which also maintains an interactive jurisdictional map indicating filming resources and contact information throughout the various cities.

However, there are opportunities for growth that could serve the entertainment industry as it continues to expand. While the film permitting structures are streamlined and well-maintained, there is inconsistent communication as it pertains to liquor and event permitting across county websites and there are ways to build that infrastructure to be just as effective and helpful as that of film. There are opportunities for direct advocacy and development within the digital entertainment and music industries through increased engagement in career development and with local communities. Finally, the incentives for film, music, and digital entertainment that are the backbone of the economy remain vulnerable and could use broad advocacy to ensure that they remain in place for the years to come to help DeKalb remain competitive against its neighbors.

DeKalb County is unique and vibrant in its cultural offerings and its ability to attract media and entertainment businesses through its tangible resources, but also its hospitality and passion for the industry. The path forward includes further developing its current assets and implementing some that are new, which can have a remarkable impact on the County's future over the next 5 years and beyond.

8. Detailed Methodology

Market Cluster and Business Practice Analysis:

This was developed using a three-pronged approach of a regulatory assessment, economic impact analysis, and asset mapping.

Regulatory Assessment

The regulatory assessment uses the results of desk research and in-depth analysis pertaining to the administrative and governing environment affecting the creative industries in DeKalb. For benchmarking purposes, the report includes best practices found in other U.S. and international cities.

Economic Impact Analysis

The economic impact analysis is macroeconomic research, which is based mainly on official secondary sources and statistics, complemented by primary research conducted by Sound Diplomacy. It provides a reliable measure of the economic importance of the Film, Music and Digital Entertainment sectors in DeKalb County, GA on three different scales: direct, indirect, and induced impact.

The results contained in this report correspond with data from 2019 and previous years. This is because most of the official data sources used have a three-year delay. For instance, during the research process, the most up-to-date version available for the County Business Patterns and RIMS II multipliers was data from 2019.

ECONOMIC IMPACT	DEFINITION
Direct Economic Impact	The direct impact is the economic activity directly connected to the Film, Music, and Digital Entertainment sectors, such as music venues, recording studios, software publishers, computer programmers, film production companies, etc.
Indirect Economic Impact	The indirect impact is related to the supportive activity of the suppliers of the Film, Music, and Digital Entertainment sectors and is

	related to local businesses that provide goods and services, such as advertising, legal affairs, food and beverage suppliers.
Induced Economic Impact	Induced impact is created when the workers of the Film, Music, and Digital Entertainment sectors spend their wages on food, transportation, entertainment, etc. in their daily life.

The variables evaluated as part of the Economic Impact Assessment are the Film, Music and Digital Entertainment sectors output, employment and gross value added (GVA).

VARIABLE	DEFINITION
Output¹⁴⁷	All produced goods and services of the Film, Music, and Digital Entertainment sectors. For example the economic output of music venues, nightclubs, film exhibitors, software developers, etc.
Employment¹⁴⁸	The number of active jobs in the production of the Film, Music, and Digital Entertainment sectors goods and services in DeKalb County.
Gross value added (GVA)¹⁴⁹	The output minus intermediate consumption (the costs of all inputs – for example, food and beverage suppliers, legal services, transportations costs, equipment, etc).

Classifications

In order to define and frame the Film, Music, and Digital Entertainment economy according to the official data available we use **The Classification of Economic Activities of the North American Industrial Code 2017 (NAICS)**, which is the standard used by federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. We have used it to calculate the economic activity in DeKalb County that is attributable to the definition of the Film, Music, and Digital Entertainment economy (see Appendix 2).

¹⁴⁷ Bureau of Economic Analysis (2017)

¹⁴⁸ Ibid.

¹⁴⁹ Ibid.

Geographical Scope

The geographic scope of this assessment is limited to DeKalb County, Georgia.

Data Sources

Six main data sources have been used to conduct the economic impact analysis in DeKalb County, GA:

Economic Data Sources

Developed by: Sound Diplomacy

DATA SOURCE	DETAILS
County Business Patterns: 2019	This source allows the calculation of the number of establishments and employees in DeKalb's County Film, Music and Digital Entertainment sectors.
BEA Regional Economic Accounts GDP by State 2001 - 2019	This source provides GDP data according to the big industries at the state and metropolitan levels.
Regional Input-Output Modeling System (RIMS II) ¹⁵⁰	<p>RIMS II provides both Type I and Type II regional input-output multipliers to estimate the indirect and induced economic impact of the NAICS economic activities at the county level.</p> <p>Type I multipliers account for the direct and indirect impacts based on the economic dynamics of the music ecosystem supply chain. Type II multipliers account for both indirect and induced impacts based on the purchases made by employees of the Film, Music, and Digital Entertainment sectors.</p>
Sound Diplomacy primary data	This data, collected through roundtables, and the mapping of agents, enables us to identify missing data and data that does not necessarily correspond to the studied sectors but that was found in the official databases.

Assets Mapping

This mapping identified film, music and digital entertainment-related assets in DeKalb County, GA. The mapping was produced using a database provided by Decide DeKalb Development

¹⁵⁰ See definitions in Appendix 2

Authority, data from secondary sources, and georeferenced with our [proprietary mapping tool](#).¹⁵¹

Stakeholder Engagement

Over the course of two months, Sound Diplomacy conducted seven roundtables, and three one-on-one interviews with stakeholders of the DeKalb film, music and digital entertainment industries.

In all interviews, participants were asked to identify the immediate **strengths** and **challenges** of the DeKalb film, music and digital entertainment ecosystems as well as the **changes** that needed to be made to create a more supportive environment for workers and businesses. The changes voiced by participants serve as opportunities for consideration as part of the overall implementation of a film, music and digital entertainment strategy. Please refer to Appendix 1 for full details of the Roundtable and Interview Key Findings.

Comparative Analysis and SWOT Analysis

Work involved the analysis of each city that forms DeKalb County, looking specifically at the regulatory and policy system and how each compares to one another. This informed (alongside the mapping, literature review, regulatory assessment, economic impact and stakeholder engagement) the SWOT to identify all strengths, weaknesses and potential opportunities for, and threats to the film, music and digital entertainment ecosystem in DeKalb County.

Five-Year Strategy and Implementation Plan

Following all desk research and stakeholder conversations, a set of 11 actionable recommendations with estimated budgets and implementation plans have been created for DeKalb to take forward.

¹⁵¹ It is important to note that there are assets that were identified but no georeference was identified. Those assets are generally related to the activity of music creation (e.g. bands, independent musicians). Such assets don't require one defined geographical space to conduct their activities. Those assets are excluded from the mapping analysis, nonetheless, are considered for the purposes of the economic impact analysis.

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10. Appendices List

Each appendix has been put into a separate document, for the list of these please see below.

Appendix 1. Regulatory Assessment and Literature Review

Appendix 2. Economic Impact Assessment

Appendix 3. Mapping

Appendix 4. Stakeholder Engagement