

FY 2021 Maryland Arts and Entertainment District Economic and Tax Impact Analysis

Prepared for
The Maryland State Arts Council

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1.0 Executive Summary

The Maryland State Arts Council (MSAC) is a State agency whose mission is “to advance the arts in our state by providing leadership that champions creative expression, diverse programming, equitable access, lifelong learning, and the arts as a celebrated contributor to the quality of life for all the people of Maryland.”¹ MSAC operates under the authority of the Maryland Department of Commerce, underscoring the State’s endorsement that the arts are an integral component of both creative and economic ecosystems within Maryland.²

MSAC manages a variety of programs statewide that supports the arts at the individual, organization, and community levels.³ One of these programs is the Arts & Entertainment Districts (A&E Districts) program, designed to “develop, promote, and support diverse artistic and cultural centers in communities across Maryland that preserve a sense of place, provide unique local experiences, attract tourism, and spur economic revitalization and neighborhood pride.”⁴

Each year, MSAC distributes an annual report for each district to complete. The report highlights the activities undertaken within these districts for the past fiscal year (FY 2021). MSAC then provides these annual reports to Towson University’s Regional Economic Studies Institute (RESI), who tabulates the annual report data into a survey report. This report details a variety of activities that have occurred within the state’s A&E Districts. RESI then utilizes some of this data to conduct an economic and tax revenue impact and footprint analysis that examines business growth within district borders, as well as visitor impacts from events and festivals. This year’s analysis covers the findings from the FY 2021 district reports. Since there was no net business growth or attendee data provided by the Annapolis district, this report only covers the impacts of 28 of the 29 A&E districts.

FY 2021 refers to the period beginning July 2020 and ending June 2021. In March of 2020, the COVID-19 virus began spreading in the U.S. Its highly contagious and serious nature led to periods of mandatory business closures, stay-at-home orders, and social distancing mandates. Many of these mandates continued until mid-2021. The FY 2021 district reports reflect the impact of the pandemic as many events and festivals were cancelled or made virtual and many establishments could not stay in business. Compared to FY 2020, FY 2021 had a significantly lower number of events, festivals, and attendance, indicating the strong impact of the pandemic on A&E districts. For these reasons, the economic impact analysis results detailed in this report are not representative of an average fiscal year.

¹ “Strategic Plan,” Maryland State Arts Council, accessed March 1, 2023, <https://msac.org/about/strategic-plan>.

² “About—Authority,” Maryland State Arts Council, accessed March 1, 2023, <https://msac.org/about>.

³ “Programs,” Maryland State Arts Council, accessed March 1, 2023, <https://msac.org/programs>.

⁴ “Arts & Entertainment Districts—Program Goals and Strategies,” Maryland State Arts Council, accessed February 27, 2023, <https://msac.org/programs/arts-entertainment-districts>.

1.1 Economic Footprint

In addition to business operations and spending associated with attendees of events and festivals, Maryland’s A&E Districts support additional economic activity throughout the state. For instance, event organizers buy supplies from other Maryland firms, or retailers pay their workers who then pay rent and buy groceries. The sum of these direct and secondary expenditures is the total economic footprint.

In FY 2021, the 28 reporting A&E Districts had a total economic footprint of:

- Approximately 2,475 jobs, comprised of 197 jobs supported by attendee spending and 2,277 supported by net business growth;
- Nearly \$571.8 million in state GDP, with \$20.5 million from attendee spending and \$551.2 million supported by net business growth; and
- Over \$152.3 million in employee compensation, comprised of \$6.7 million from attendee spending and \$145.6 million from net business growth.

Figure 1 below contains the footprint of Maryland’s A&E Districts by type of activity. Please note that sums may not total exactly due to rounding.

Figure 1: Economic Footprint of Maryland's A&E Districts, FY 2021

Activity Type	Direct	Indirect	Induced	Total
<i>Overall Attendee Footprint</i>				
Employment	156	19	20	197
State GDP	\$11,693,027	\$4,632,015	\$4,222,964	\$20,548,011
Employee Compensation	\$4,067,280	\$1,363,299	\$1,248,285	\$6,678,870
<i>Net Business Growth</i>				
Employment	921	605	750	2,277
State GDP	\$289,553,424	\$125,704,732	\$135,957,426	\$551,215,583
Employee Compensation	\$79,030,100	\$26,361,825	\$40,236,001	\$145,627,926
Total				
Employment	1,078	624	769	2,475
State GDP	\$301,246,451	\$130,336,747	\$140,180,391	\$571,763,594
Employee Compensation	\$83,097,380	\$27,725,125	\$41,484,286	\$152,306,797

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

1.2 Tax Footprint

The economic footprints presented above produced approximately \$24.2 million in taxes for state and county governments. As seen in Figure 2, income and sales taxes form the majority of these revenues.

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Figure 2: Total State and County Tax Footprints of Maryland's A&E Districts, FY 2021

Activity Type	Property	Income	Sales	Payroll	Other	Total
Out-of-State Visitor Impact	\$87,040	\$61,961	\$102,368	\$1,340	\$28,267	\$280,976
In-State Attendee Footprint	\$256,872	\$175,651	\$302,109	\$3,820	\$84,193	\$822,645
Business Net Growth Impact	\$5,851,658	\$8,046,286	\$6,882,163	\$112,731	\$2,205,244	\$23,098,082
Total	\$6,195,571	\$8,283,897	\$7,286,640	\$117,890	\$2,317,705	\$24,201,704

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Maryland's 29 A&E Districts contribute to the cultural fabric of the state as well as the economy. This economic activity is shared throughout the state, ranging from dense, urban districts in Baltimore City and the suburbs of Washington, D.C., to sprawling districts that cover entire downtown areas on the Eastern Shore. As the A&E District program continues to grow, and local residents continue to establish districts in their communities, the arts and creative energy in the state will continue to flourish—and benefit the economy.

2.0 Introduction

The Maryland State Arts Council (MSAC) is a State agency whose mission is “to advance the arts in our state by providing leadership that champions creative expression, diverse programming, equitable access, lifelong learning, and the arts as a celebrated contributor to the quality of life for all the people of Maryland.”⁵ To achieve this mission, MSAC works to increase participation in the arts for all Maryland residents, provide support to all MSAC constituents, further build its organizational and governance capacity, leverage current partnerships and create new beneficial collaborations, and lastly, showcase Maryland’s diverse and vibrant arts community and the contributions they make to the state.⁶ MSAC operates under the authority of the Maryland Department of Commerce, underscoring the State’s endorsement that the arts are an integral component of both creative and economic ecosystems within Maryland.⁷

MSAC manages a variety of programs statewide that support the arts at the individual, organization, and community levels.⁸ One of these programs is the Arts & Entertainment Districts (A&E Districts) program, designed to “develop, promote, and support diverse artistic and cultural centers in communities across Maryland that preserve a sense of place, provide unique local experiences, attract tourism, and spur economic revitalization and neighborhood pride.”⁹ Each A&E District has unique economic development goals and priorities, which can include producing or facilitating events, attracting new businesses or developers, encouraging artists to locate and/or sell artworks in the district’s boundaries, or a combination of strategies. On November 25, 2019, Maryland Secretary of Commerce Kelly M. Schultz announced that Catonsville was Maryland’s newest designated A&E District—and the first in Baltimore County. FY 2021 represents the first year for which Catonsville data were reported and included in the analysis.¹⁰

Each year, MSAC distributes an annual report for each district to complete. The report highlights the activities undertaken within these districts for the past fiscal year (FY). MSAC tasked Towson University’s Regional Economic Studies Institute (RESI) with analyzing the data collected from the annual report. To achieve the project objective, RESI collated and analyzed the survey results in a comprehensive report of 28 reporting districts for FY 2021.¹¹

Once this preliminary analysis was completed, RESI utilized the results to conduct an economic and tax analysis of the state’s A&E Districts. To quantify the role of A&E Districts within Maryland’s economy, RESI considered the role of net new business growth within district

⁵ “Strategic Plan,” Maryland State Arts Council.

⁶ Ibid.

⁷ “About—Authority,” Maryland State Arts Council.

⁸ “Programs,” Maryland State Arts Council.

⁹ “Arts & Entertainment Districts—Program Goals and Strategies,” Maryland State Arts Council.

¹⁰ “Maryland Commerce Designates New Arts and Entertainment District in Baltimore County,” Maryland Department of Commerce, November 25, 2019, accessed March 7, 2023, <https://commerce.maryland.gov/media/maryland-commerce-designates-new-arts-and-entertainment-district-in-baltimore-county>.

¹¹ The Annapolis district did not provide data for FY 2021 and is not included in the analysis.

borders in FY 2021 (July 2020-June 2021), as well as spending associated with attendees at events and festivals within district boundaries in FY 2021. This analysis continues the 12-year relationship between MSAC and RESI, and updates the economic and tax analysis to reflect changes in the underlying model data as well as refinements to the modeling process. These changes will be discussed in Section 3. Because of these changes, the results presented in this report cannot be directly compared to previous economic and tax analyses of A&E Districts prior to FY 2019.

The report continues as follows:

- Section 3.0 presents the methodology utilized for the analysis;
- Section 4.0 provides background information about the role of cultural and arts districts in the economy;
- Section 5.0 presents the economic analysis;
- Section 6.0 presents the tax revenue analysis; and
- Section 7.0 concludes the report.

In addition, the report contains several appendices that present more detailed methodology, detailed results, information on A&E Districts, and the annual report template.

3.0 Technical Approach

Maryland's A&E Districts support creativity, and in turn, spur economic activity in their localities. This activity supports additional businesses throughout Maryland's economy. Thus, the total influence of Maryland's A&E Districts extends beyond district borders. This total activity can be quantified using economic impact models. This section will provide more context on the economic model used in the analysis as well as RESI's modeling process.

3.1 Model Background

For this analysis, the economic models are based on multipliers for a certain geographic region's economy—the state of Maryland in this instance. Based on the activity under consideration, the model can estimate the economic activity associated with suppliers/inputs as well as any additional activity that occurs because employees who carry out the activity or suppliers use their earnings to support their households. In economic terms, the *direct effect* is the activity under consideration, the *indirect effects* are associated with suppliers, and the *induced effects* are associated with increased household spending. In addition, all of these effects generate tax revenues for state and county jurisdictions.

Consider the following hypothetical example for a gallery in an A&E District: the direct effect is any activity associated with the gallery itself (art sales, admission sales, etc.). The indirect effect would be spending on supplies to run the gallery (canvas, paint brushes, electricity to light the gallery, etc.). The induced effect would be spending by the employees of the gallery or any of the suppliers (buying groceries, going to a movie, paying rent, etc.).

Direct, indirect, and induced effects can be presented in a variety of ways—in terms of employee counts, economic output or state GDP, or employee compensation. Since these metrics represent different ways of measuring the same effect, they are not additive. For the FY 2021 economic and tax analysis of Maryland’s A&E Districts, RESI used the IMPLAN model for the state of Maryland for 2021 and represented the results in 2022 dollars. The 2021 model year is based on a 546-sector scheme for the state’s economy.¹²

As noted in the last two reports, this scheme was not used in any of the analyses conducted prior to FY 2019. Due to this variation, as well as significant changes to the underlying data in the model, the results of the IMPLAN analysis in this report cannot be directly compared to reports prior to FY 2019.¹³ Beyond the sector scheme transition, IMPLAN introduced an updated tax results section that no longer includes the “state and local tax impact” category used in all RESI reports before FY 2019.¹⁴ As with the previous two reports (FY 2019 and FY 2020), RESI combined the state and county tax impact results to best replicate the former analysis category. For this reason, tax impact analysis results in this report cannot be directly compared to any report prior to FY 2019. Additionally, IMPLAN notes that some economic effects may appear smaller in this up-to-date version of the model due to methodological and underlying data changes, even if the economy is not shrinking.¹⁵

3.2 Modeling Approach

To capture the economic activity associated with Maryland’s A&E districts, RESI considered two different activities: spending associated with attendees at events in festivals within A&E Districts during FY 2021, and activity associated with net new businesses that opened within A&E Districts in FY 2021. Please note that some of these processes have been updated from prior analyses to re-benchmark spending patterns. Thus, these results cannot be directly compared with prior reports.

3.2.1 Modeling Attendee Spending

Events and festivals within Maryland’s A&E Districts attract thousands of attendees from within Maryland as well as out-of-state visitors. It is important to consider the residence of attendees because any spending by visitors brings new dollars into Maryland’s economy, whereas Maryland residents are reallocating spending towards the A&E District’s local community. Economic effects associated with spending by visitors to the state are *economic impacts*, while the effects associated with all attendees (regardless of their state of residence) can be considered the *economic footprint* of the event or festival.

¹² Angela Slovachek, “546 Industries, Conversions, Bridges, & Construction - 2021 Data,” IMPLAN, updated February 2023, accessed February 28, 2023, <https://support.implan.com/hc/en-us/articles/10473981710619-546-Industries-Conversions-Bridges-Construction-2021-Data>.

¹³ Candi Clouse, “BEA Benchmark and the New 546 Industry Scheme—Comparing Data Across Time,” IMPLAN, updated February 2022, accessed February 28, 2023, <https://implanhelp.zendesk.com/hc/en-us/articles/360034895094-BEA-Benchmark-The-New-546-Industry-Scheme>.

¹⁴ Candi Clouse, “Version 6 Release Notes—6.9 Release,” IMPLAN, updated February 2023, accessed February 28, 2023, <https://support.implan.com/hc/en-us/articles/1260802300950-Version-6-Release-Notes>.

¹⁵ Clouse, “BEA Benchmark and the New 546 Industry Scheme—Comparing Data Across Time.”

To calculate the traditional economic impacts and the economic footprint of events and festivals in Maryland's A&E Districts in FY 2021, RESI utilized information provided in the annual reports. Generally, A&E Districts provided a list of events and festivals as well as approximate attendance. Please note that this may result in under-counting or over-counting of attendee counts in some districts. RESI used these attendance figures and research published by Americans for the Arts to estimate attendee spending at A&E District events and festivals. These calculations take into consideration both the proportion of attendees that are Maryland residents versus out-of-state visitors, as well as the different spending patterns for these two groups.¹⁶

RESI then matched these spending categories with industry sectors in the IMPLAN model and entered these spending totals into IMPLAN, which calculated the direct, indirect, and induced effects of attendee spending for events and festivals in Maryland's A&E Districts. Results were reported for the economic footprint as well as the economic impact. State and county tax revenues associated with the economic analysis were also calculated within the IMPLAN model.

3.2.2 Modeling Net New Business Activity

RESI also quantified the economic impact associated with net new business activity (the total number of businesses that opened during the FY less the total number that closed). For this analysis, RESI utilized data provided in the annual reports—districts provided lists of retailers, businesses, restaurants, and organizations that opened or closed within the district's borders. Generally, employee counts were also provided. In cases where employee counts were unavailable, RESI estimated employment levels based on other A&E Districts' data. Please note that this may result in under-counting or over-counting of employment levels in some districts.

RESI then matched these businesses' employee counts with industry sectors aligned with the business. These employee counts were then entered into the IMPLAN model, which calculated the direct, indirect, and induced impacts associated with the net new businesses in Maryland's A&E Districts. Associated tax revenues paid to state and county jurisdictions were also estimated within the IMPLAN model.

4.0 The Arts and their Role in the Economy

According to the most current edition of Americans for the Arts report, *Arts & Economic Prosperity V*, the nonprofit arts and culture industry in the U.S. generated \$166.3 billion in total direct expenditures and \$96.1 billion in resident household incomes in 2015. This activity supported 4.6 million full-time equivalent jobs. Jobs within the arts and culture industry account for 0.8 percent of the U.S. workforce, which exceeds the proportion of the workforce

¹⁶ Americans for the Arts, "The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland," 1, accessed February 28, 2023, https://www.americansforthearts.org/sites/default/files/pdf/2017/by_program/reports_and_data/aep5/map/MD_StateOfMaryland_AEP5_OnePageSummary.pdf.

who are Police Officers (0.5 percent) and Computer Programmers (0.2 percent).¹⁷ Taxes associated with the industry and paid to local, state, and federal governments amounted to \$27.5 billion.¹⁸

The arts and culture industry is also important to the Mid-Atlantic region. Figure 3 provides key economic statistics at the state level. These metrics provide useful context to Maryland’s comparative standing, as well as the role of the industry in the region. As shown in Figure 3, the District of Columbia tops the charts in value added per capita. This is likely due in part to its population being smaller than the other four comparison areas, in addition to other local factors.

Figure 3: Statewide Economic Metrics for the Nonprofit Arts and Culture Industry, 2020

State	Value Added per Capita	Compensation per Employee
District of Columbia	\$17,243	\$154,526
New Jersey	\$2,242	\$97,471
Pennsylvania	\$1,980	\$83,099
<i>Maryland</i>	<i>\$1,646</i>	<i>\$89,420</i>
Delaware	\$869	\$66,142

Sources: National Assembly of State Arts Agencies, RESI, U.S. Census Bureau

The Bureau of Economic Analysis (BEA), an agency of the U.S. Department of Commerce, collects and publishes arts-related economic data. The BEA is in charge of the Arts and Cultural Production Satellite Account (ACPSA) to collect and interpret economic data specifically on the arts and culture industry in the U.S.

As of 2020, the most recent data available from the ACPSA, the industry’s economic activity accounted for 4.2 percent of GDP, or \$876.7 billion, nationwide. In the same report, employment data shows that the industry provided 4.6 million jobs nationwide, though the percent change in these jobs decreased in all 50 states and the District of Columbia from the year prior.¹⁹ The ACPSA also produces state-level data; information on the Mid-Atlantic Region is presented in Figure 4 below.

¹⁷ Americans for the Arts, “Arts & Economic Prosperity V: The Economic Impact of Nonprofit Arts & Cultural Organizations and Their Audiences,” 5, accessed September 8, 2021, https://www.americansforthearts.org/sites/default/files/aep5/PDF_Files/NationalFindings_StatisticalReport.pdf.

¹⁸ Ibid, 4.

¹⁹ “Arts and Cultural Production Satellite Account, U.S. and States,” U.S. Bureau of Economic Analysis, last modified March 15, 2022, accessed February 19, 2023, <https://www.bea.gov/news/2022/arts-and-cultural-production-satellite-account-us-and-states-2020>.

Figure 4: Statewide Economic Comparison of Arts and Cultural Production Industries across Mid-Atlantic States, 2020

State	Employment	Employment Location Quotient	Compensation (in Thousands)	Compensation Location Quotient
Pennsylvania	156,980	0.86	13,044,923	0.77
New Jersey	119,619	0.98	11,659,389	0.86
<i>Maryland</i>	<i>68,265</i>	<i>0.81</i>	<i>6,104,270</i>	<i>0.68</i>
District of Columbia	53,141	2.26	8,211,645	2.11
Delaware	7,357	0.52	486,609	0.36
United States	4,590,980	1.00	445,975,155	1.00

Sources: National Assembly of State Arts Agencies, U.S. BEA ACPSA

The table above includes sections on employment and compensation location quotients. The ACPSA defines location quotients (LQs) as a measurement of “an industry’s regional concentration of value added, employment, or compensation relative to the U.S. industry’s share.”²⁰ LQs are based on a number system where a score of one is equal to the industry’s national proportion. For example, in Figure 4 above, Maryland has an employment LQ of 0.81 and a compensation LQ of 0.68. This indicates that Maryland’s employment in the industry is 19 percent below the industry’s national employment share and that Maryland’s compensation in the industry is 32 percent below the industry’s national compensation share. Compared to the LQs of other states shown in Figure 4, Maryland is not an outlier, with Delaware at the lower end and District of Columbia at the upper end.

In addition to the role of the arts and culture industry in a state’s economy, individuals who attend related events or visit arts establishments also contribute to the economy. Figure 5 below shows average event-related spending per person by residential status provided by Americans for the Arts.^{21,22} Resident attendees are defined as members of the audience who live in the area, while nonresident attendees are members of the audience who travel to the locality to attend the event or visit the establishment.

²⁰ U.S. Bureau of Economic Analysis, “Definitions,” accessed February 28, 2023, <https://apps.bea.gov/regional/pdf/acpsa/definitions.pdf>.

²¹ Americans for the Arts, “Arts & Economic Prosperity V,” 1.

²² RESI adjusted these spending estimates for inflation from 2015 to 2022 dollars.

Figure 5: Nonprofit Arts and Cultural Event Attendees Average Spending per Person (2022 Dollars)

Expenditure Category	Resident Attendee	Nonresident Attendee
Meals and Refreshments	\$17.50	\$26.09
Souvenirs and Gifts	\$3.36	\$5.68
Ground Transportation	\$2.95	\$5.54
Overnight Lodging (one night)	\$0.60	\$9.19
Other/Miscellaneous	\$3.04	\$3.26
Total	\$27.44	\$49.76

Sources: Americans for the Arts, RESI

Figure 5 above shows that nonresident attendees, on average, spend almost double what resident attendees spend. The main cost difference is driven by the overnight lodging category, where nonresident attendees spend 15 times more than their resident counterparts. This variation in spending patterns is not the only difference between the two groups: nonresident attendees are referred to as “economic visitors” and the dollars they spend are “new dollars” entering the economy in question. On the other hand, resident attendees would be expected to spend locally even if they did not attend that specific event.

5.0 Economic Footprint and Impacts

This section contains the results of the economic analysis for Maryland’s A&E Districts. Calculations are based on the 2021 IMPLAN Model for the state of Maryland. Economic activity is considered in terms of employment, state GDP, and employee compensation based on attendee spending at district events and festivals held in FY 2021 and net new businesses that opened in the districts in FY 2021. Impacts are presented in 2022 dollars. For more detailed results, please see Appendix C—Detailed Economic and Tax Impacts and Footprints. Throughout this section, please note that totals may not sum due to rounding.

5.1 Overall Economic Footprint of Maryland’s A&E Districts

This section provides a summary of the overall economic footprint of Maryland’s A&E Districts for FY 2021, including the:

1. Economic impact of visitor spending associated with district events and festivals;
2. Economic footprint of Maryland resident spending at events and festivals, which is directed to the localities where A&E Districts are located; and
3. Economic impact of net business growth in the districts.

Figure 6 below displays the total economic footprint of economic activity of Maryland’s A&E Districts in FY 2021. In general, older, more established districts tend to have larger economic impacts. Please note that these figures are not directly comparable to past analyses due to changes in the underlying data in the economic model, as well as recalibrations of spending patterns to better reflect current trends. Despite not being able to directly compare this analysis to past ones, the current analysis does point towards a significant departure in trend in

terms of both visitor and resident spending at events and festivals and net business growth. This variation is most likely attributable to circumstances caused by the COVID-19 pandemic. The COVID-19 virus began spreading in the U.S. in March of 2020 and its highly contagious and serious nature led to periods of mandatory business closures, stay-at-home orders, and social distancing mandates. The pandemic has caused severe health and economic consequences that are not exclusive to the state of Maryland, but rather have been experienced on a global scale.

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Figure 6: Total Economic Footprint of Maryland's A&E Districts, FY 2021²³

District	Designation Year	Employment	State GDP	Employee Compensation
Annapolis	2008	N/R	N/R	N/R
Bel Air	2010	44	\$5,064,357	\$1,688,672
Berlin	2005	98	\$11,038,812	\$3,563,455
Bethesda	2002	1,673	\$476,104,610	\$119,325,385
Bromo	2013	64	\$11,531,584	\$3,765,585
Cambridge	2003	3	\$384,519	\$124,871
Catonsville	2020	20	\$2,043,061	\$620,728
Chestertown	2015	14	\$1,510,721	\$491,662
Crisfield	2018	12	\$1,472,045	\$457,935
Cumberland	2002	82	\$11,747,713	\$3,817,201
Denton	2005	0	\$15,790	\$5,132
Easton	2019	-26	-\$2,881,359	-\$941,099
Elkton	2006	9	\$976,779	\$318,401
Frederick	2003	101	\$14,809,781	\$3,975,350
Frostburg	2009	20	\$2,976,037	\$855,809
Gateway	2002	-9	-\$1,008,476	-\$329,385
Grantsville	2015	5	\$515,461	\$144,017
Hagerstown	2002	96	\$16,475,493	\$4,151,585
Havre de Grace	2008	74	\$9,115,040	\$2,880,549
Highlandtown	2003	22	\$2,888,730	\$904,323
Leonardtwn	2014	14	\$1,455,524	\$476,616
Oakland	2017	26	\$4,444,096	\$1,363,749
Pennsylvania Ave.	2019	-6	-\$755,717	-\$310,057
Salisbury	2007	26	\$293,499	\$231,529
Silver Spring	2002	-9	-\$5,293,453	-\$760,495
Snow Hill	2006	23	\$3,062,923	\$1,225,717
Station North	2002	114	\$16,552,388	\$5,543,293
Stevensville	2014	26	\$2,769,043	\$885,003
Wheaton	2006	-43	-\$15,545,406	-\$2,168,735
Total	--	2,475	\$571,763,594	\$152,306,797

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

²³ Districts with negative impacts do not negatively affect the Maryland economy. Rather, they are the result of more businesses leaving the district than opening in a district within the study period, or if less resource-intensive employment replaces more resource-intensive employment. For example, if one physician job with a salary of \$150,000 is lost but two server jobs with wages of \$40,000 each are gained, there would still be a "loss" of \$70,000 even though the number of jobs increases by one.

In FY 2021, Maryland's A&E Districts supported a total of 2,475 jobs, nearly \$571.8 million in state GDP, and more than \$152.3 million in employee compensation. As shown in Figure 6 above, economic activity was distributed throughout the state, though district-level activity varied significantly. Data reported by Bethesda, a metropolitan area in Montgomery County, had the largest effect on Maryland's economy, totaling 1,673 jobs, \$476.1 million in state GDP, and \$119.3 million in employee compensation. The Station North A&E District in Baltimore City saw the second-largest footprint, at 114 jobs, \$16.6 million in state GDP, and \$5.5 million in employee compensation.

As noted previously, these overall footprints are due to attendee spending and net business growth within districts. The following subsections will examine these economic activities on a more granular level.

5.2 Event and Festival Attendee Footprint and Impact

Maryland's A&E Districts were home to 553 events and festivals in FY 2021, with reported attendance of approximately 436,288.²⁴ Based on data reported by Americans for the Arts, RESI estimated that approximately 84.9 percent of attendees were Maryland residents, while the other 15.1 percent were visitors from out of state.²⁵ However, since out-of-state visitors tend to have higher spending levels than their in-state counterparts, they account for approximately 24.4 percent of attendee spending. On average, in 2022 dollars, each out-of-state visitor spent approximately \$49.76, while each Maryland resident attendee spent approximately \$27.44.²⁶

In FY 2020, there was an uncharacteristically low number of events and festivals, as well as low attendance numbers following the COVID-19 pandemic.²⁷ In FY 2021, the number of events and festivals that took place in the designated A&E districts continued to decline after the onset of the COVID-19 pandemic.²⁸ Below, Figure 7 contains the statewide economic effects associated with attendee spending, presented by the residency of the visitor. Impacts associated with out-of-state visitors represent new dollars flowing into the Maryland economy, spurring additional activity. Footprint figures associated with Maryland residents represent spending that is directed to local economies where A&E districts are located. For impacts at the district level, please see Appendix C.

²⁴ Please note that for the 28 A&E Districts that reported data, not all could provide exact attendance figures for corresponding events and/or festivals. Therefore, attendance figures are approximate and may be under- or over-counted.

²⁵ Americans for the Arts, "The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland," 1.

²⁶ RESI analysis of Americans for the Arts data: Americans for the Arts, "The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland," 1.

²⁷ Although direct comparisons should be made with caution, the estimated number of visitors did decrease from approximately 1.9 million to 1.6 million and the estimated number of events and festivals also decreased from approximately 1,499 to 965 from FY 2019 to FY 2020.

²⁸ Although direct comparisons should be made with caution, the estimated number of visitors did decrease from approximately 1.6 million in FY 2020 to 0.4 million in FY 2021, and the estimated number of events and festivals also decreased from approximately 965 to 553 in FY 2021.

Figure 7: Statewide Economic Footprints of A&E District Event/Festival Attendee Spending, FY 2021

Activity Type	Direct	Indirect	Induced	Total
<i>Out-of-State Visitor Impact</i>				
Employment	38	4	4	48
State GDP	\$2,936,804	\$1,107,597	\$1,100,643	\$5,145,047
Employee Compensation	\$1,081,778	\$327,168	\$325,355	\$1,734,304
<i>In-state Attendee Footprint</i>				
Employment	118	15	15	150
State GDP	\$8,756,222	\$3,524,418	\$3,122,322	\$15,402,964
Employee Compensation	\$2,985,502	\$1,036,131	\$922,930	\$4,944,566
<i>Overall Attendee Footprint</i>				
Employment	156	19	20	197
State GDP	\$11,693,027	\$4,632,015	\$4,222,964	\$20,548,011
Employee Compensation	\$4,067,280	\$1,363,299	\$1,248,285	\$6,678,870

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Overall spending by attendees at events and festivals in Maryland’s A&E Districts in FY 2021 directly supported 156 jobs, approximately \$11.7 million in state GDP, and nearly \$4.1 million in employee compensation. When considering economic activity associated with suppliers to these direct activities, as well as additional spending by employees carrying out these activities, the total footprint grew to 197 jobs, over \$20.5 million in state GDP, and nearly \$6.7 million in employee compensation.

Of particular importance are the out-of-state visitor impacts, as they are the result of new dollars flowing into Maryland’s economy. Their expenditures supported a total of 48 jobs, over \$5.1 million in state GDP, and more than \$1.7 million in employee compensation.

5.3 Net Business Growth Economic Impact

Businesses within Maryland’s A&E Districts contribute to the cultural offerings in their districts and bolster the Maryland economy. Statewide, there was a net growth of 38 retailers, 27 businesses, 11 restaurants, and 14 organizations with a combined estimated employment of 921 workers.²⁹ These net new businesses supported additional economic activity in Maryland’s economy, as presented in Figure 8.

²⁹ In their annual reports, some districts reported employee counts for establishments that opened or closed; for districts that did not provide this information, RESI estimated employee counts based on data from other districts.

Figure 8: Economic Impacts of Net Business Growth in Maryland's A&E Districts, FY 2021

	Direct	Indirect	Induced	Total
Employment	921	605	750	2,277
State GDP	\$289,553,424	\$125,704,732	\$135,957,426	\$551,215,583
Employee Compensation	\$79,030,100	\$26,361,825	\$40,236,001	\$145,627,926

Sources: IMPLAN, MSAC, RESI

In FY 2021, the estimated 921 direct jobs in Maryland's A&E Districts supported an additional 1,355 indirect and induced jobs in Maryland's economy, for a total of 2,277 jobs. These 2,277 jobs paid total employee compensation of more than \$145.6 million and were associated with approximately \$551.2 million in state GDP.

6.0 Tax Revenue Footprints and Impacts

The economic footprints presented in the previous section produced corresponding tax impacts for the State of Maryland. In the cases of net new businesses and spending by out-of-state visitors, taxes paid represent new dollars paid to state coffers. For any taxes paid by Maryland residents, these are not necessarily new tax revenues for the State, but rather represent the footprint or reach of spending associated with A&E Districts. Taxes paid to the State and County as a result of economic activity tied to Maryland's A&E Districts are presented in Figure 9. For impacts at the district level, please see Appendix C—Detailed Economic and Tax Impacts and Footprints.

Figure 9: Total Tax Revenue Footprint of Maryland's A&E Districts, FY 2021

Activity Type	Property	Income	Sales	Payroll	Other	Total
Out-of-State Visitor Impact	\$87,040	\$61,961	\$102,368	\$1,340	\$28,267	\$280,976
In-State Attendee Footprint	\$256,872	\$175,651	\$302,109	\$3,820	\$84,193	\$822,645
Business Net Growth Impact	\$5,851,658	\$8,046,286	\$6,882,163	\$112,731	\$2,205,244	\$23,098,082
Total	\$6,195,571	\$8,283,897	\$7,286,640	\$117,890	\$2,317,705	\$24,201,704

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

As seen above, state and county governments received over \$24.2 million in revenues associated with Maryland's A&E Districts. Income and sales tax revenues formed the majority of the tax revenue footprint at a combined \$15.6 million. Net business growth was the driver of state and county tax revenue in FY 2021, accounting for approximately 95 percent of the total tax revenue footprint. Additionally, tax impacts associated with out-of-state visitors were

especially valuable to Maryland and local governments, as they are associated with new dollars being injected into the state's economy.

7.0 Conclusion

Maryland's A&E Districts contribute to the cultural fabric of the state as well as the economy. In FY 2021, activity associated with Maryland's 28 reporting A&E Districts supported 2,475 jobs, nearly \$571.8 million in state GDP, \$152.3 million in employee compensation, and \$24.2 million in state and county tax revenues. This economic activity is shared throughout the state, ranging from dense, urban districts in Baltimore City and the suburbs of Washington, D.C., to sprawling districts that cover entire downtown areas on the Eastern Shore. As the A&E District program continues to grow, and local residents continue to establish districts in their communities, the arts and creative energy in the state will continue to enhance lives and benefit the economy.

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Appendix A—Methodology

A.1 IMPLAN Model Overview

To quantify the economic and tax impacts of the A&E districts on Maryland, RESI utilized the IMPLAN input/output model. This model enumerates the economic and tax impact of each dollar earned and spent by the following: employees in the district, other supporting vendors (business services, retail, etc.), each dollar spent by these vendors on other firms, and each dollar spent by the households' employees, other vendors' employees, and other businesses' employees.

Economists measure three types of economic impacts: direct, indirect, and induced impacts. The direct economic effects are generated as district entities conduct their operations. The indirect economic impacts occur as district entities purchase goods and services from other firms (for example supplies). As district entities and suppliers to these entities hire workers to complete the tasks, the increases in employment generate an increase in household income, as new job opportunities are created and income levels rise. This drives the induced economic impacts that result from households increasing their purchases at local businesses.

Consider the following example. A new firm opens in a region and directly employs 100 workers. The firm purchases supplies, both from outside the region as well as from local suppliers, which leads to increased business for local firms, thereby hypothetically creating jobs for another 100 workers. This is called the indirect effect. The workers at the firm and at suppliers spend their income mostly in the local area, hypothetically creating jobs for another 50 workers. This is the induced effect. The direct, indirect and induced effects add up to 250 jobs created from the original 100 jobs. Thus, in terms of employment, the total economic impact of the firm in our example is 250.³⁰

This analysis was conducted using the 2021 IMPLAN Model for the state of Maryland, the most recent data year available. Please note that results generated using models after 2019 cannot be directly compared to results from prior models.

A.2 IMPLAN Modeling Process

Impacts were determined based on two main factors: net business growth and spending by attendees at events and festivals. When data were not available from the districts, RESI estimated attendance and/or employment data based on all of the other district's data.

1. Net business growth within the districts' borders; that is, the increase in employment at firms that opened during FY 2021 less the employment at firms that closed in FY 2021; and
2. Estimated spending by attendees at events and festivals, based on attendance counts provided by the districts in their FY 2021 annual report and visitor spending data published by Americans for the Arts.

³⁰ Total economic impact is defined as the sum of direct, indirect, and induced effects.

Using Maryland-specific attendee spending estimates from Americans from the Arts represents an additional methodological change from prior analyses, which had to rely upon spending estimates from sources that were less representative of conditions in the state. Re-benchmarking these spending estimates has led to a decrease in estimated economic effects. However, this does not mean that Maryland’s A&E Districts are on the decline or are contributing less to Maryland’s economy. Rather, methodological changes prevent direct comparisons to previous analyses.

The IMPLAN Model estimates economic effects based on a set of underlying multipliers aligned to its 546 industry sector scheme. To conduct the analysis, RESI assigned input data to its corresponding IMPLAN industry sector code. IMPLAN codes utilized in the analysis are provided below.

Figure 10: IMPLAN Codes Used in the Analysis

Code	Description
402	Retail - Motor vehicle and parts dealers
403	Retail - Furniture and home furnishings stores
404	Retail - Electronics and appliance stores
405	Retail - Building material and garden equipment and supplies stores
406	Retail - Food and beverage stores
407	Retail - Health and personal care stores
409	Retail - Clothing and clothing accessories stores
410	Retail - Sporting goods, hobby, musical instrument and book stores
411	Retail - General merchandise stores
412	Retail - Miscellaneous store retailers
413	Retail - Nonstore retailers
418	Transit and ground passenger transportation
425	Book publishers
429	Motion picture and video industries
436	Data processing, hosting, and related services
439	Nondepository credit intermediation and related activities
441	Monetary authorities and depository credit intermediation
442	Other financial investment activities
444	Insurance carriers, except direct life
447	Other real estate
448	Tenant-occupied housing
455	Legal services
457	Architectural, engineering, and related services
458	Specialized design services
462	Management consulting services
466	Photographic services
473	Business support services

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475	Investigation and security services
478	Other support services
481	Junior colleges, colleges, universities, and professional schools
482	Other educational services
483	Offices of physicians
484	Offices of dentists
485	Offices of other health practitioners
486	Outpatient care centers
493	Individual and family services
494	Child day care services
495	Community food, housing, and other relief services, including rehabilitation services
496	Performing arts companies
497	Commercial Sports Except Racing
500	Promoters of performing arts and sports and agents for public figures
501	Museums, historical sites, zoos, and parks
504	Other amusement and recreation industries
505	Fitness and recreational sports centers
507	Hotels and motels, including casino hotels
508	Other accommodations
509	Full-service restaurants
510	Limited-service restaurants
511	All other food and drinking places
512	Automotive repair and maintenance, except car washes
516	Personal and household goods repair and maintenance
517	Personal care services
519	Dry-cleaning and laundry services
520	Other personal services
522	Grantmaking, giving, and social advocacy organizations
523	Business and professional associations
524	Labor and civic organizations
526	Postal service

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Two IMPLAN models were created for each district—one for attendee spending and one for net business growth. After the models were run, results for employment effects, state GDP effects, employee compensation effects, and State and County tax revenue effects were exported to Microsoft Excel. Results were aggregated to the district level, and then all districts were aggregated to the state level. Appendix C—Detailed Economic and Tax Impacts and Footprints contains additional detailed impacts.

Appendix B—Glossary

Figure 11: Glossary of Terms

Term	Definition
Economic Impact	This term refers to the changes in the economy resulting from an economic event and activities that support the event. Economic impacts are generated when the economic event is new or would not otherwise occur in the study region.
Economic footprint	This term refers to the additional economic activity supported by an initial activity. This initial activity would have occurred in the study region anyway.
Employment	This term refers to the number of jobs created or supported as a result of district activity which has been modeled in IMPLAN.
Employee Compensation Impact	This term refers to the change in employee compensation (including all salaries and wages, benefits, etc.) associated with the job and state GDP creation resulting from district activity which has been modeled in IMPLAN.
Fiscal/Tax Impact	This term refers to the change in tax revenues resulting from an event. RESI typically reports state and local tax revenues, which are combined in IMPLAN.
IMPLAN	This term refers to the input/output modeling software used to model changes in the economy in a particular region. The user builds a model based on prepackaged economic data from IMPLAN (typically at the state or county level), then enters input figures—an industry change of employment or sales, a household change of income, and/or several other input types—for the industry sectors expected to be impacted as a “scenario.” IMPLAN runs the scenario created in the model and produces the economic and fiscal/tax outputs.
New Businesses	This term refers to all of the businesses which were newly created within an A&E district during the study period according to data provided in the A&E district annual reports. These businesses may include both for-profit and nonprofit entities. The breakout of for-profit and nonprofit businesses cannot be precisely determined from the data provided.
State GDP	This term refers to the economic activity created as a result of district activity that has been modeled in IMPLAN. In other words, it is the market value of all final goods and services produced by the economy of the region being modeled.

Source: RESI

Appendix C—Detailed Economic and Tax Impacts and Footprints

This section provides detailed impact and footprint data at the district level.

C.1 Employment

Figure 12: Out-of-state Visitor Employment Impacts

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	5	1	1	6
Berlin	1	0	0	2
Bethesda	0	0	0	1
Bromo	0	0	0	0
Cambridge	0	0	0	0
Catonsville	0	0	0	0
Chestertown	3	0	0	4
Crisfield	0	0	0	0
Cumberland	0	0	0	0
Denton	0	0	0	0
Easton	N/R	N/R	N/R	N/R
Elkton	1	0	0	1
Frederick	10	1	2	13
Frostburg	1	0	0	1
Gateway	0	0	0	0
Grantsville	1	0	0	1
Hagerstown	3	0	0	3
Havre de Grace	3	0	0	4
Highlandtown	2	0	0	2
Leonardtwn	2	0	0	3
Oakland	1	0	0	1
Pennsylvania Ave.	0	0	0	0
Salisbury	3	0	0	4
Silver Spring	0	0	0	0
Snow Hill	0	0	0	0
Station North	1	0	0	1
Stevensville	0	0	0	0
Wheaton	0	0	0	0
Total	38	4	4	48

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Figure 13: In-state Attendee Employment Footprint

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	15	2	2	19
Berlin	4	1	1	5
Bethesda	1	0	0	2
Bromo	0	0	0	0
Cambridge	0	0	0	0
Catonsville	1	0	0	1
Chestertown	9	1	1	11
Crisfield	0	0	0	0
Cumberland	0	0	0	0
Denton	0	0	0	0
Easton	N/R	N/R	N/R	N/R
Elkton	2	0	0	3
Frederick	31	4	4	40
Frostburg	3	0	0	3
Gateway	0	0	0	0
Grantsville	2	0	0	3
Hagerstown	8	1	1	11
Havre de Grace	10	1	1	13
Highlandtown	6	1	1	8
Leonardtwn	7	1	1	8
Oakland	4	0	0	4
Pennsylvania Ave.	0	0	0	0
Salisbury	9	1	1	12
Silver Spring	0	0	0	0
Snow Hill	0	0	0	0
Station North	2	0	0	2
Stevensville	1	0	0	1
Wheaton	0	0	0	0
Total	118	15	15	150

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Figure 14: Overall Attendee (Out-of-state and In-state) Employment Footprint

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	20	3	3	25
Berlin	6	1	1	7
Bethesda	2	0	0	2
Bromo	0	0	0	0
Cambridge	0	0	0	0
Catonsville	1	0	0	2
Chestertown	12	1	2	15
Crisfield	0	0	0	0
Cumberland	0	0	0	0
Denton	0	0	0	0
Easton	N/R	N/R	N/R	N/R
Elkton	3	0	0	4
Frederick	42	6	6	53
Frostburg	4	0	0	4
Gateway	0	0	0	0
Grantsville	3	0	0	4
Hagerstown	11	1	1	14
Havre de Grace	14	2	2	17
Highlandtown	8	1	1	10
Leonardtwn	9	1	1	11
Oakland	5	0	0	6
Pennsylvania Ave.	0	0	0	0
Salisbury	12	2	2	16
Silver Spring	0	0	0	0
Snow Hill	0	0	0	0
Station North	2	0	0	3
Stevensville	2	0	0	2
Wheaton	0	0	0	0
Total	156	19	20	197

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Figure 15: Net Business Growth Employment Impacts

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	13	3	3	19
Berlin	70	11	11	91
Bethesda	479	534	658	1,671
Bromo	29	21	13	63
Cambridge	3	0	0	3
Catonsville	14	3	2	18
Chestertown	-1	0	0	-1
Crisfield	9	2	1	12
Cumberland	59	9	13	82
Denton	N/R	N/R	N/R	N/R
Easton	-20	-3	-3	-26
Elkton	4	0	1	5
Frederick	30	11	7	48
Frostburg	10	3	2	15
Gateway	-7	-1	-1	-9
Grantsville	1	0	0	1
Hagerstown	56	12	13	81
Havre de Grace	42	7	8	57
Highlandtown	8	2	2	12
Leonardtwn	2	0	0	3
Oakland	12	5	4	20
Pennsylvania Ave.	-4	-1	-1	-6
Salisbury	15	-4	0	11
Silver Spring	4	-10	-2	-9
Snow Hill	16	2	4	23
Station North	73	20	18	111
Stevensville	19	3	3	24
Wheaton	-12	-23	-8	-43
Total	921	605	750	2,277

Sources: IMPLAN, MSAC, RESI

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Figure 16: Full Employment Footprint for Maryland's A&E Districts, FY 2021

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	33	5	6	44
Berlin	75	11	12	98
Bethesda	481	534	658	1,673
Bromo	29	21	13	64
Cambridge	3	0	0	3
Catonsville	15	3	2	20
Chestertown	11	1	2	14
Crisfield	9	2	1	12
Cumberland	59	9	13	82
Denton	0	0	0	0
Easton	-20	-3	-3	-26
Elkton	7	1	1	9
Frederick	71	17	13	101
Frostburg	14	3	3	20
Gateway	-7	-1	-1	-9
Grantsville	4	0	0	5
Hagerstown	67	14	15	96
Havre de Grace	55	9	10	74
Highlandtown	16	3	3	22
Leonardtwn	11	1	1	14
Oakland	16	5	5	26
Pennsylvania Ave.	-4	-1	-1	-6
Salisbury	27	-2	1	26
Silver Spring	4	-10	-2	-9
Snow Hill	16	2	4	23
Station North	75	20	18	114
Stevensville	20	3	3	26
Wheaton	-12	-23	-8	-43
Total	1,078	624	769	2,475

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

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C.2 Output or State GDP

Figure 17: Out-of-state Visitor Spending State GDP Impacts, FY 2021

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$366,112	\$138,077	\$137,210	\$641,399
Berlin	\$104,780	\$39,517	\$39,269	\$183,567
Bethesda	\$36,791	\$13,875	\$13,788	\$64,455
Bromo	\$7,311	\$2,757	\$2,740	\$12,808
Cambridge	\$0	\$0	\$0	\$0
Catonsville	\$27,917	\$10,529	\$10,462	\$48,908
Chestertown	\$220,066	\$82,997	\$82,476	\$385,538
Crisfield	\$5,269	\$1,987	\$1,975	\$9,231
Cumberland	\$3,032	\$1,143	\$1,136	\$5,312
Denton	\$2,257	\$851	\$846	\$3,955
Easton	N/R	N/R	N/R	N/R
Elkton	\$57,255	\$21,593	\$21,458	\$100,307
Frederick	\$778,273	\$293,521	\$291,678	\$1,363,472
Frostburg	\$66,547	\$25,098	\$24,940	\$116,586
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$59,802	\$22,554	\$22,412	\$104,769
Hagerstown	\$210,538	\$79,403	\$78,905	\$368,846
Havre de Grace	\$256,325	\$96,671	\$96,064	\$449,060
Highlandtown	\$154,886	\$58,414	\$58,048	\$271,349
Leonardtwn	\$166,402	\$62,758	\$62,364	\$291,523
Oakland	\$87,665	\$33,062	\$32,855	\$153,583
Pennsylvania Ave.	\$8,524	\$3,215	\$3,194	\$14,933
Salisbury	\$231,123	\$87,167	\$86,620	\$404,910
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$8,827	\$3,329	\$3,308	\$15,464
Station North	\$45,901	\$17,311	\$17,203	\$80,415
Stevensville	\$29,514	\$11,131	\$11,061	\$51,706
Wheaton	\$1,685	\$635	\$631	\$2,951
Total	\$2,936,804	\$1,107,597	\$1,100,643	\$5,145,047

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

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Figure 18: In-state Visitor Spending State GDP Impacts, FY 2021

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$1,091,237	\$439,231	\$389,123	\$1,919,591
Berlin	\$312,310	\$125,707	\$111,366	\$549,383
Bethesda	\$109,660	\$44,139	\$39,103	\$192,903
Bromo	\$21,791	\$8,771	\$7,770	\$38,333
Cambridge	\$0	\$0	\$0	\$0
Catonsville	\$83,209	\$33,492	\$29,671	\$146,373
Chestertown	\$658,677	\$265,099	\$234,829	\$1,158,605
Crisfield	\$15,706	\$6,322	\$5,600	\$27,628
Cumberland	\$9,038	\$3,638	\$3,223	\$15,898
Denton	\$6,728	\$2,708	\$2,399	\$11,835
Easton	N/R	N/R	N/R	N/R
Elkton	\$170,656	\$68,690	\$60,854	\$300,200
Frederick	\$2,319,730	\$933,708	\$827,190	\$4,080,628
Frostburg	\$198,352	\$79,838	\$70,730	\$348,920
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$178,248	\$71,746	\$63,561	\$313,555
Hagerstown	\$627,532	\$252,586	\$223,771	\$1,103,889
Havre de Grace	\$764,005	\$307,517	\$272,435	\$1,343,957
Highlandtown	\$461,656	\$185,820	\$164,622	\$812,098
Leonardtwn	\$495,980	\$199,636	\$176,861	\$872,477
Oakland	\$261,296	\$105,173	\$93,175	\$459,645
Pennsylvania Ave.	\$25,407	\$10,226	\$9,060	\$44,693
Salisbury	\$688,890	\$277,283	\$245,650	\$1,211,823
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$26,310	\$10,590	\$9,382	\$46,282
Station North	\$136,814	\$55,068	\$48,786	\$240,669
Stevensville	\$87,969	\$35,408	\$31,369	\$154,746
Wheaton	\$5,021	\$2,021	\$1,790	\$8,832
Total	\$8,756,222	\$3,524,418	\$3,122,322	\$15,402,964

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

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Figure 19: Overall Visitor Spending State GDP Impacts, FY 2021

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$1,457,349	\$577,308	\$526,333	\$2,560,990
Berlin	\$417,090	\$165,224	\$150,635	\$732,950
Bethesda	\$146,451	\$58,014	\$52,892	\$257,358
Bromo	\$29,102	\$11,528	\$10,510	\$51,141
Cambridge	\$0	\$0	\$0	\$0
Catonsville	\$111,126	\$44,021	\$40,134	\$195,281
Chestertown	\$878,743	\$348,095	\$317,305	\$1,544,143
Crisfield	\$20,975	\$8,309	\$7,575	\$36,860
Cumberland	\$12,070	\$4,781	\$4,359	\$21,211
Denton	\$8,986	\$3,559	\$3,245	\$15,790
Easton	N/R	N/R	N/R	N/R
Elkton	\$227,911	\$90,284	\$82,312	\$400,507
Frederick	\$3,098,003	\$1,227,230	\$1,118,868	\$5,444,100
Frostburg	\$264,899	\$104,936	\$95,670	\$465,506
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$238,050	\$94,300	\$85,974	\$418,324
Hagerstown	\$838,070	\$331,989	\$302,675	\$1,472,735
Havre de Grace	\$1,020,329	\$404,189	\$368,500	\$1,793,018
Highlandtown	\$616,543	\$244,234	\$222,669	\$1,083,447
Leonardtwn	\$662,383	\$262,393	\$239,225	\$1,164,000
Oakland	\$348,961	\$138,236	\$126,030	\$613,227
Pennsylvania Ave.	\$33,931	\$13,441	\$12,254	\$59,626
Salisbury	\$920,013	\$364,450	\$332,270	\$1,616,733
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$35,138	\$13,919	\$12,690	\$61,747
Station North	\$182,715	\$72,380	\$65,989	\$321,084
Stevensville	\$117,483	\$46,539	\$42,429	\$206,451
Wheaton	\$6,706	\$2,656	\$2,422	\$11,783
Total	\$11,693,027	\$4,632,015	\$4,222,964	\$20,548,011

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

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Figure 20: Net Business Growth State GDP Impacts, FY 2021

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$1,400,638	\$520,375	\$582,355	\$2,503,367
Berlin	\$5,921,436	\$2,337,591	\$2,046,835	\$10,305,862
Bethesda	\$245,184,730	\$111,461,168	\$119,201,354	\$475,847,253
Bromo	\$5,711,523	\$3,323,314	\$2,445,606	\$11,480,443
Cambridge	\$229,187	\$81,602	\$73,730	\$384,519
Catonsville	\$935,650	\$560,506	\$351,625	\$1,847,781
Chestertown	\$7,604	-\$39,599	-\$1,428	-\$33,422
Crisfield	\$811,772	\$349,717	\$273,696	\$1,435,185
Cumberland	\$7,424,293	\$1,843,804	\$2,458,405	\$11,726,502
Denton	N/R	N/R	N/R	N/R
Easton	-\$1,677,510	-\$627,119	-\$576,730	-\$2,881,359
Elkton	\$335,502	\$125,424	\$115,346	\$576,272
Frederick	\$5,578,034	\$2,521,483	\$1,266,163	\$9,365,681
Frostburg	\$1,456,952	\$604,782	\$448,796	\$2,510,531
Gateway	-\$587,128	-\$219,492	-\$201,856	-\$1,008,476
Grantsville	\$59,811	\$35,734	\$1,592	\$97,137
Hagerstown	\$9,860,568	\$2,748,629	\$2,393,561	\$15,002,758
Havre de Grace	\$4,300,888	\$1,585,672	\$1,435,463	\$7,322,023
Highlandtown	\$895,728	\$561,987	\$347,568	\$1,805,283
Leonardtwn	\$166,402	\$62,758	\$62,364	\$291,523
Oakland	\$1,891,785	\$1,176,833	\$762,250	\$3,830,868
Pennsylvania Ave.	-\$379,299	-\$237,753	-\$198,291	-\$815,343
Salisbury	-\$386,036	-\$870,587	-\$66,610	-\$1,323,234
Silver Spring	-\$2,764,011	-\$2,098,570	-\$430,873	-\$5,293,453
Snow Hill	\$1,779,317	\$467,313	\$754,546	\$3,001,176
Station North	\$9,104,221	\$3,865,922	\$3,261,161	\$16,231,304
Stevensville	\$1,426,892	\$595,043	\$540,656	\$2,562,591
Wheaton	-\$9,135,525	-\$5,031,806	-\$1,389,859	-\$15,557,189
Total	\$289,553,424	\$125,704,732	\$135,957,426	\$551,215,583

Sources: IMPLAN, MSAC, RESI

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Figure 21: Full State GDP Footprint for Maryland's A&E Districts, FY 2021

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$2,857,986	\$1,097,683	\$1,108,688	\$5,064,357
Berlin	\$6,338,527	\$2,502,815	\$2,197,470	\$11,038,812
Bethesda	\$245,331,182	\$111,519,182	\$119,254,246	\$476,104,610
Bromo	\$5,740,626	\$3,334,842	\$2,456,116	\$11,531,584
Cambridge	\$229,187	\$81,602	\$73,730	\$384,519
Catonsville	\$1,046,775	\$604,527	\$391,759	\$2,043,061
Chestertown	\$886,348	\$308,496	\$315,877	\$1,510,721
Crisfield	\$832,747	\$358,026	\$281,271	\$1,472,045
Cumberland	\$7,436,363	\$1,848,585	\$2,462,764	\$11,747,713
Denton	\$8,986	\$3,559	\$3,245	\$15,790
Easton	-\$1,677,510	-\$627,119	-\$576,730	-\$2,881,359
Elkton	\$563,413	\$215,707	\$197,658	\$976,779
Frederick	\$8,676,037	\$3,748,712	\$2,385,032	\$14,809,781
Frostburg	\$1,721,852	\$709,718	\$544,467	\$2,976,037
Gateway	-\$587,128	-\$219,492	-\$201,856	-\$1,008,476
Grantsville	\$297,861	\$130,034	\$87,566	\$515,461
Hagerstown	\$10,698,638	\$3,080,619	\$2,696,236	\$16,475,493
Havre de Grace	\$5,321,217	\$1,989,860	\$1,803,963	\$9,115,040
Highlandtown	\$1,512,270	\$806,222	\$570,237	\$2,888,730
Leonardtwn	\$828,785	\$325,151	\$301,588	\$1,455,524
Oakland	\$2,240,747	\$1,315,068	\$888,280	\$4,444,096
Pennsylvania Ave.	-\$345,368	-\$224,312	-\$186,037	-\$755,717
Salisbury	\$533,977	-\$506,137	\$265,660	\$293,499
Silver Spring	-\$2,764,011	-\$2,098,570	-\$430,873	-\$5,293,453
Snow Hill	\$1,814,455	\$481,232	\$767,236	\$3,062,923
Station North	\$9,286,936	\$3,938,302	\$3,327,150	\$16,552,388
Stevensville	\$1,544,375	\$641,582	\$583,085	\$2,769,043
Wheaton	-\$9,128,819	-\$5,029,149	-\$1,387,437	-\$15,545,406
Total	\$301,246,451	\$130,336,747	\$140,180,391	\$571,763,594

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

C.3 Employee Compensation

Figure 22: Out-of-state Visitor Spending Employee Compensation Impacts, FY 2021

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$134,858	\$40,786	\$40,560	\$216,204
Berlin	\$38,596	\$11,673	\$11,608	\$61,877
Bethesda	\$13,552	\$4,098	\$4,076	\$21,727
Bromo	\$2,693	\$814	\$810	\$4,317
Cambridge	\$0	\$0	\$0	\$0
Catonsville	\$10,283	\$3,110	\$3,093	\$16,486
Chestertown	\$81,062	\$24,516	\$24,380	\$129,958
Crisfield	\$1,941	\$587	\$584	\$3,112
Cumberland	\$1,117	\$338	\$336	\$1,790
Denton	\$831	\$251	\$250	\$1,333
Easton	N/R	N/R	N/R	N/R
Elkton	\$21,090	\$6,378	\$6,343	\$33,812
Frederick	\$286,678	\$86,702	\$86,222	\$459,603
Frostburg	\$24,513	\$7,414	\$7,372	\$39,299
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$22,028	\$6,662	\$6,625	\$35,316
Hagerstown	\$77,552	\$23,455	\$23,325	\$124,331
Havre de Grace	\$94,418	\$28,556	\$28,397	\$151,371
Highlandtown	\$57,053	\$17,255	\$17,159	\$91,467
Leonardtwn	\$61,295	\$18,538	\$18,435	\$98,267
Oakland	\$32,292	\$9,766	\$9,712	\$51,770
Pennsylvania Ave.	\$3,140	\$950	\$944	\$5,034
Salisbury	\$85,135	\$25,748	\$25,605	\$136,488
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$3,252	\$983	\$978	\$5,213
Station North	\$16,908	\$5,113	\$5,085	\$27,107
Stevensville	\$10,871	\$3,288	\$3,270	\$17,429
Wheaton	\$621	\$188	\$186	\$995
Total	\$1,081,778	\$327,168	\$325,355	\$1,734,304

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

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Figure 23: In-state Attendee Spending Employee Compensation Footprint, FY 2021

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$372,063	\$129,135	\$115,025	\$616,223
Berlin	\$106,484	\$36,958	\$32,920	\$176,362
Bethesda	\$37,389	\$12,977	\$11,559	\$61,925
Bromo	\$7,430	\$2,579	\$2,297	\$12,305
Cambridge	\$0	\$0	\$0	\$0
Catonsville	\$28,371	\$9,847	\$8,771	\$46,988
Chestertown	\$224,600	\$77,887	\$69,384	\$371,872
Crisfield	\$5,355	\$1,859	\$1,655	\$8,869
Cumberland	\$3,082	\$1,069	\$953	\$5,104
Denton	\$2,294	\$796	\$709	\$3,799
Easton	N/R	N/R	N/R	N/R
Elkton	\$58,186	\$20,195	\$17,988	\$96,370
Frederick	\$790,925	\$274,512	\$244,519	\$1,309,955
Frostburg	\$67,629	\$23,473	\$20,908	\$112,010
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$60,775	\$21,093	\$18,789	\$100,657
Hagerstown	\$213,961	\$74,261	\$66,147	\$354,368
Havre de Grace	\$260,492	\$90,411	\$80,532	\$431,434
Highlandtown	\$157,404	\$54,631	\$48,662	\$260,698
Leonardtwn	\$169,107	\$58,693	\$52,280	\$280,081
Oakland	\$89,090	\$30,921	\$27,543	\$147,554
Pennsylvania Ave.	\$8,663	\$3,006	\$2,678	\$14,347
Salisbury	\$234,881	\$81,522	\$72,615	\$389,017
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$8,971	\$3,113	\$2,773	\$14,857
Station North	\$46,647	\$16,190	\$14,421	\$77,259
Stevensville	\$29,994	\$10,410	\$9,273	\$49,676
Wheaton	\$1,712	\$594	\$529	\$2,835
Total	\$2,985,502	\$1,036,131	\$922,930	\$4,944,566

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

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Figure 24: Overall Attendee Spending Employee Compensation Footprint, FY 2021

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$506,921	\$169,921	\$155,586	\$832,428
Berlin	\$145,080	\$48,631	\$44,528	\$238,239
Bethesda	\$50,941	\$17,075	\$15,635	\$83,652
Bromo	\$10,123	\$3,393	\$3,107	\$16,623
Cambridge	\$0	\$0	\$0	\$0
Catonsville	\$38,654	\$12,957	\$11,863	\$63,474
Chestertown	\$305,662	\$102,404	\$93,764	\$501,830
Crisfield	\$7,296	\$2,445	\$2,239	\$11,981
Cumberland	\$4,198	\$1,407	\$1,288	\$6,894
Denton	\$3,126	\$1,047	\$959	\$5,132
Easton	N/R	N/R	N/R	N/R
Elkton	\$79,276	\$26,573	\$24,331	\$130,181
Frederick	\$1,077,603	\$361,214	\$330,741	\$1,769,558
Frostburg	\$92,142	\$30,886	\$28,280	\$151,308
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$82,803	\$27,755	\$25,414	\$135,972
Hagerstown	\$291,513	\$97,715	\$89,472	\$478,700
Havre de Grace	\$354,909	\$118,966	\$108,930	\$582,805
Highlandtown	\$214,457	\$71,886	\$65,822	\$352,165
Leonardtwn	\$230,402	\$77,231	\$70,715	\$378,348
Oakland	\$121,382	\$40,687	\$37,255	\$199,324
Pennsylvania Ave.	\$11,802	\$3,956	\$3,622	\$19,381
Salisbury	\$320,015	\$107,270	\$98,220	\$525,505
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$12,222	\$4,097	\$3,751	\$20,070
Station North	\$63,555	\$21,304	\$19,506	\$104,365
Stevensville	\$40,865	\$13,698	\$12,542	\$67,105
Wheaton	\$2,332	\$782	\$716	\$3,830
Total	\$4,067,280	\$1,363,299	\$1,248,285	\$6,678,870

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

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Figure 25: Net Business Growth Employee Compensation Impacts, FY 2021

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$541,802	\$142,253	\$172,190	\$856,245
Berlin	\$2,066,807	\$653,417	\$604,992	\$3,325,216
Bethesda	\$61,742,205	\$22,216,723	\$35,282,805	\$119,241,733
Bromo	\$1,810,041	\$1,215,922	\$723,000	\$3,748,962
Cambridge	\$79,208	\$23,874	\$21,789	\$124,871
Catonsville	\$316,919	\$136,394	\$103,940	\$557,254
Chestertown	-\$2,108)	-\$7,643	-\$417	-\$10,168
Crisfield	\$266,272	\$98,786	\$80,896	\$445,955
Cumberland	\$2,565,722	\$517,820	\$726,764	\$3,810,307
Denton	N/R	N/R	N/R	N/R
Easton	-\$591,695	-\$178,941	-\$170,464	-\$941,099
Elkton	\$118,339	\$35,788	\$34,093	\$188,220
Frederick	\$1,171,880	\$659,766	\$374,145	\$2,205,792
Frostburg	\$411,156	\$160,675	\$132,668	\$704,500
Gateway	-\$207,093	-\$62,629	-\$59,662	-\$329,385
Grantsville	-\$6,783	\$14,360	\$467	\$8,045
Hagerstown	\$2,193,292	\$771,975	\$707,618	\$3,672,885
Havre de Grace	\$1,422,387	\$451,048	\$424,309	\$2,297,744
Highlandtown	\$318,425	\$130,993	\$102,741	\$552,158
Leonardtwn	\$61,295	\$18,538	\$18,435	\$98,267
Oakland	\$612,315	\$326,759	\$225,351	\$1,164,425
Pennsylvania Ave.	-\$205,980	-\$64,853	-\$58,604	-\$329,437
Salisbury	\$19,305	-\$293,712	-\$19,569	-\$293,976
Silver Spring	-\$8,271	-\$624,918	-\$127,307	-\$760,495
Snow Hill	\$842,491	\$140,118	\$223,038	\$1,205,647
Station North	\$3,381,236	\$1,093,888	\$963,803	\$5,438,928
Stevensville	\$505,734	\$152,321	\$159,844	\$817,898
Wheaton	-\$394,803	-\$1,366,898	-\$410,863	-\$2,172,565
Total	\$79,030,100	\$26,361,825	\$40,236,001	\$145,627,926

Sources: IMPLAN, MSAC, RESI

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Figure 26: Full Employee Compensation Footprint of Maryland's A&E Districts, FY 2021

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$1,048,723	\$312,174	\$327,775	\$1,688,672
Berlin	\$2,211,887	\$702,048	\$649,520	\$3,563,455
Bethesda	\$61,793,146	\$22,233,798	\$35,298,440	\$119,325,385
Bromo	\$1,820,164	\$1,219,315	\$726,107	\$3,765,585
Cambridge	\$79,208	\$23,874	\$21,789	\$124,871
Catonsville	\$355,573	\$149,351	\$115,804	\$620,728
Chestertown	\$303,554	\$94,761	\$93,348	\$491,662
Crisfield	\$273,568	\$101,232	\$83,136	\$457,935
Cumberland	\$2,569,921	\$519,227	\$728,053	\$3,817,201
Denton	\$3,126	\$1,047	\$959	\$5,132
Easton	-\$591,695	-\$178,941	-\$170,464	-\$941,099
Elkton	\$197,615	\$62,361	\$58,424	\$318,401
Frederick	\$2,249,483	\$1,020,981	\$704,886	\$3,975,350
Frostburg	\$503,299	\$191,562	\$160,949	\$855,809
Gateway	-\$207,093	-\$62,629	-\$59,662	-\$329,385
Grantsville	\$76,020	\$42,116	\$25,881	\$144,017
Hagerstown	\$2,484,805	\$869,691	\$797,089	\$4,151,585
Havre de Grace	\$1,777,296	\$570,014	\$533,239	\$2,880,549
Highlandtown	\$532,882	\$202,879	\$168,562	\$904,323
Leonardtwn	\$291,696	\$95,769	\$89,150	\$476,616
Oakland	\$733,697	\$367,446	\$262,605	\$1,363,749
Pennsylvania Ave.	-\$194,177	-\$60,897	-\$54,982	-\$310,057
Salisbury	\$339,321	-\$186,442	\$78,650	\$231,529
Silver Spring	-\$8,271	-\$624,918	-\$127,307	-\$760,495
Snow Hill	\$854,714	\$144,215	\$226,789	\$1,225,717
Station North	\$3,444,791	\$1,115,192	\$983,309	\$5,543,293
Stevensville	\$546,599	\$166,019	\$172,386	\$885,003
Wheaton	-\$392,471	-\$1,366,116	-\$410,148	-\$2,168,735
Total	\$83,097,380	\$27,725,125	\$41,484,286	\$152,306,797

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2021 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

C.4 State and County Tax Revenue Footprint

Figure 27: Total State and County Tax Impacts of Out-of-State Visitor Spending, FY 2021

District	Property	Income	Sales	Payroll	Other	Total
Annapolis	N/R	N/R	N/R	N/R	N/R	N/R
Bel Air	\$10,851	\$7,724	\$12,762	\$167	\$3,524	\$35,027
Berlin	\$3,105	\$2,211	\$3,652	\$48	\$1,009	\$10,025
Bethesda	\$1,090	\$776	\$1,282	\$17	\$354	\$3,520
Bromo	\$217	\$154	\$255	\$3	\$70	\$700
Cambridge	\$0	\$0	\$0	\$0	\$0	\$0
Catonsville	\$827	\$589	\$973	\$13	\$269	\$2,671
Chestertown	\$6,522	\$4,643	\$7,671	\$100	\$2,118	\$21,055
Crisfield	\$156	\$111	\$184	\$2	\$51	\$504
Cumberland	\$90	\$64	\$106	\$1	\$29	\$290
Denton	\$67	\$48	\$79	\$1	\$22	\$216
Easton	N/R	N/R	N/R	N/R	N/R	N/R
Elkton	\$1,697	\$1,208	\$1,996	\$26	\$551	\$5,478
Frederick	\$23,066	\$16,420	\$27,128	\$355	\$7,491	\$74,461
Frostburg	\$1,972	\$1,404	\$2,320	\$30	\$641	\$6,367
Gateway	\$0	\$0	\$0	\$0	\$0	\$0
Grantsville	\$1,772	\$1,262	\$2,085	\$27	\$576	\$5,722
Hagerstown	\$6,240	\$4,442	\$7,339	\$96	\$2,026	\$20,143
Havre de Grace	\$7,597	\$5,408	\$8,935	\$117	\$2,467	\$24,524
Highlandtown	\$4,590	\$3,268	\$5,399	\$71	\$1,491	\$14,819
Leonardtown	\$4,932	\$3,511	\$5,800	\$76	\$1,602	\$15,920
Oakland	\$2,598	\$1,850	\$3,056	\$40	\$844	\$8,387
Pennsylvania Ave.	\$253	\$180	\$297	\$4	\$82	\$816
Salisbury	\$6,850	\$4,876	\$8,056	\$105	\$2,225	\$22,113
Silver Spring	\$0	\$0	\$0	\$0	\$0	\$0
Snow Hill	\$262	\$186	\$308	\$4	\$85	\$845
Station North	\$1,360	\$968	\$1,600	\$21	\$442	\$4,392
Stevensville	\$875	\$623	\$1,029	\$13	\$284	\$2,824
Wheaton	\$50	\$36	\$59	\$1	\$16	\$161
Total	\$87,040	\$61,961	\$102,368	\$1,340	\$28,267	\$280,976

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2021 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 28: Total State and County Tax Footprint of In-state Visitor Spending, FY 2021

District	Property	Income	Sales	Payroll	Other	Total
Annapolis	N/R	N/R	N/R	N/R	N/R	N/R
Bel Air	\$32,011	\$21,889	\$37,648	\$476	\$10,492	\$102,515
Berlin	\$9,161	\$6,265	\$10,775	\$136	\$3,003	\$29,340
Bethesda	\$3,217	\$2,200	\$3,783	\$48	\$1,054	\$10,302
Bromo	\$639	\$437	\$752	\$10	\$210	\$2,047
Cambridge	\$0	\$0	\$0	\$0	\$0	\$0
Catonsville	\$2,441	\$1,669	\$2,871	\$36	\$800	\$7,817
Chestertown	\$19,337	\$13,223	\$22,743	\$288	\$6,338	\$61,928
Crisfield	\$461	\$315	\$542	\$7	\$151	\$1,475
Cumberland	\$265	\$181	\$312	\$4	\$87	\$849
Denton	\$197	\$135	\$232	\$3	\$65	\$632
Easton	N/R	N/R	N/R	N/R	N/R	N/R
Elkton	\$5,006	\$3,423	\$5,888	\$74	\$1,641	\$16,032
Frederick	\$68,047	\$46,531	\$80,031	\$1,012	\$22,304	\$217,925
Frostburg	\$5,819	\$3,979	\$6,843	\$87	\$1,907	\$18,634
Gateway	\$0	\$0	\$0	\$0	\$0	\$0
Grantsville	\$5,229	\$3,575	\$6,150	\$78	\$1,714	\$16,745
Hagerstown	\$18,408	\$12,588	\$21,650	\$274	\$6,034	\$58,953
Havre de Grace	\$22,411	\$15,325	\$26,358	\$333	\$7,346	\$71,774
Highlandtown	\$13,542	\$9,260	\$15,927	\$201	\$4,439	\$43,370
Leonardtwn	\$14,549	\$9,949	\$17,111	\$216	\$4,769	\$46,594
Oakland	\$7,665	\$5,241	\$9,015	\$114	\$2,512	\$24,547
Pennsylvania Ave.	\$745	\$510	\$877	\$11	\$244	\$2,387
Salisbury	\$20,208	\$13,818	\$23,767	\$300	\$6,623	\$64,717
Silver Spring	\$0	\$0	\$0	\$0	\$0	\$0
Snow Hill	\$772	\$528	\$908	\$11	\$253	\$2,472
Station North	\$4,013	\$2,744	\$4,720	\$60	\$1,315	\$12,853
Stevensville	\$2,581	\$1,765	\$3,035	\$38	\$846	\$8,264
Wheaton	\$147	\$101	\$173	\$2	\$48	\$472
Total	\$256,872	\$175,651	\$302,109	\$3,820	\$84,193	\$822,645

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2021 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 29: Total State and County Tax Footprint of All Attendee Spending, FY 2021

District	Property	Income	Sales	Payroll	Other	Total
Annapolis	N/R	N/R	N/R	N/R	N/R	N/R
Bel Air	\$42,861	\$29,613	\$50,409	\$643	\$14,016	\$137,543
Berlin	\$12,267	\$8,475	\$14,427	\$184	\$4,011	\$39,364
Bethesda	\$4,307	\$2,976	\$5,066	\$65	\$1,408	\$13,822
Bromo	\$856	\$591	\$1,007	\$13	\$280	\$2,747
Cambridge	\$0	\$0	\$0	\$0	\$0	\$0
Catonsville	\$3,268	\$2,258	\$3,844	\$49	\$1,069	\$10,488
Chestertown	\$25,859	\$17,866	\$30,413	\$388	\$8,456	\$82,983
Crisfield	\$617	\$426	\$726	\$9	\$202	\$1,980
Cumberland	\$355	\$245	\$418	\$5	\$116	\$1,139
Denton	\$264	\$183	\$311	\$4	\$86	\$848
Easton	N/R	N/R	N/R	N/R	N/R	N/R
Elkton	\$6,703	\$4,631	\$7,883	\$101	\$2,192	\$21,510
Frederick	\$91,114	\$62,951	\$107,159	\$1,367	\$29,794	\$292,386
Frostburg	\$7,791	\$5,383	\$9,163	\$117	\$2,548	\$25,001
Gateway	\$0	\$0	\$0	\$0	\$0	\$0
Grantsville	\$7,001	\$4,837	\$8,234	\$105	\$2,289	\$22,467
Hagerstown	\$24,648	\$17,030	\$28,989	\$370	\$8,060	\$79,096
Havre de Grace	\$30,008	\$20,733	\$35,293	\$450	\$9,813	\$96,297
Highlandtown	\$18,133	\$12,528	\$21,326	\$272	\$5,929	\$58,189
Leonardtwn	\$19,481	\$13,460	\$22,912	\$292	\$6,370	\$62,515
Oakland	\$10,263	\$7,091	\$12,070	\$154	\$3,356	\$32,935
Pennsylvania Ave.	\$998	\$689	\$1,174	\$15	\$326	\$3,202
Salisbury	\$27,058	\$18,695	\$31,823	\$406	\$8,848	\$86,830
Silver Spring	\$0	\$0	\$0	\$0	\$0	\$0
Snow Hill	\$1,033	\$714	\$1,215	\$16	\$338	\$3,316
Station North	\$5,374	\$3,713	\$6,320	\$81	\$1,757	\$17,244
Stevensville	\$3,455	\$2,387	\$4,064	\$52	\$1,130	\$11,088
Wheaton	\$197	\$136	\$232	\$3	\$64	\$633
Total	\$343,913	\$237,612	\$404,477	\$5,160	\$112,460	\$1,103,621

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2021 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 30: Total State and County Tax Impact of Net Business Growth, FY 2021

District	Property	Income	Sales	Payroll	Other	Total
Annapolis	N/R	N/R	N/R	N/R	N/R	N/R
Bel Air	\$91,725	\$33,138	\$107,879	\$661	\$22,511	\$255,915
Berlin	\$148,918	\$114,661	\$175,143	\$2,568	\$53,108	\$494,398
Bethesda	\$3,997,543	\$7,103,103	\$4,701,529	\$92,317	\$1,690,915	\$17,585,407
Bromo	\$118,861	\$138,204	\$139,793	\$2,906	\$41,110	\$440,875
Cambridge	\$1,164	\$4,101	\$1,369	\$96	\$1,265	\$7,996
Catonsville	\$62,776	\$19,775	\$73,831	\$431	\$14,308	\$171,120
Chestertown	-\$15,207	-\$35	-\$17,885	-\$8	-\$2,475	-\$35,610
Crisfield	\$29,500	\$15,324	\$34,695	\$344	\$8,968	\$88,832
Cumberland	\$549,104	\$138,762	\$645,804	\$2,944	\$139,112	\$1,475,727
Denton	N/R	N/R	N/R	N/R	N/R	N/R
Easton	-\$35,334	-\$32,284	-\$41,557	-\$727	-\$13,857	-\$123,759
Elkton	\$7,067	\$6,457	\$8,311	\$145	\$2,771	\$24,752
Frederick	\$185,968	\$70,077	\$218,718	\$1,703	\$56,245	\$532,711
Frostburg	\$33,421	\$25,275	\$39,306	\$545	\$13,501	\$112,049
Gateway	-\$12,367	-\$11,299	-\$14,545	-\$254	-\$4,850	-\$43,316
Grantsville	\$15,306	\$58	\$18,002	\$6	\$3,100	\$36,472
Hagerstown	\$542,623	\$135,300	\$638,182	\$2,840	\$143,448	\$1,462,392
Havre de Grace	\$110,241	\$80,610	\$129,655	\$1,775	\$38,833	\$361,114
Highlandtown	\$46,204	\$19,544	\$54,340	\$426	\$11,445	\$131,959
Leonardtwn	\$4,932	\$3,511	\$5,800	\$76	\$1,602	\$15,920
Oakland	\$85,207	\$43,118	\$100,212	\$900	\$23,535	\$252,973
Pennsylvania Ave.	-\$15,622	-\$11,063	-\$18,374	-\$255	-\$3,665	-\$48,979
Salisbury	-\$38,156	-\$2,718	-\$44,875	-\$220	-\$6,916	-\$92,885
Silver Spring	-\$73,846	-\$23,725	-\$86,850	-\$596	-\$34,968	-\$219,985
Snow Hill	-\$10,968	\$42,382	-\$12,899	\$931	\$6,143	\$25,590
Station North	\$115,519	\$181,730	\$135,862	\$4,220	\$66,892	\$504,223
Stevensville	\$123,932	\$30,623	\$145,757	\$633	\$28,691	\$329,635
Wheaton	-\$216,852	-\$78,343	-\$255,041	-\$1,679	-\$95,527	-\$647,442
Total	\$5,851,658	\$8,046,286	\$6,882,163	\$112,731	\$2,205,244	\$23,098,082

Sources: IMPLAN, MSAC, RESI

FY 2021 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 31: Total State Tax Footprint of Maryland's A&E Districts, FY 2021

District	Property	Income	Sales	Payroll	Other	Total
Annapolis	N/R	N/R	N/R	N/R	N/R	N/R
Bel Air	\$134,587	\$62,752	\$158,288	\$1,304	\$36,527	\$393,457
Berlin	\$161,185	\$123,136	\$189,570	\$2,752	\$57,120	\$533,763
Bethesda	\$4,001,850	\$7,106,079	\$4,706,595	\$92,382	\$1,692,323	\$17,599,229
Bromo	\$119,717	\$138,796	\$140,799	\$2,919	\$41,390	\$443,621
Cambridge	\$1,164	\$4,101	\$1,369	\$96	\$1,265	\$7,996
Catonsville	\$66,044	\$22,033	\$77,674	\$480	\$15,377	\$181,608
Chestertown	\$10,652	\$17,831	\$12,528	\$380	\$5,981	\$47,372
Crisfield	\$30,117	\$15,751	\$35,421	\$354	\$9,169	\$90,812
Cumberland	\$549,459	\$139,008	\$646,222	\$2,949	\$139,228	\$1,476,866
Denton	\$264	\$183	\$311	\$4	\$86	\$848
Easton	-\$35,334	-\$32,284	-\$41,557	-\$727	-\$13,857	-\$123,759
Elkton	\$13,770	\$11,088	\$16,195	\$246	\$4,963	\$46,262
Frederick	\$277,082	\$133,028	\$325,878	\$3,070	\$86,039	\$825,097
Frostburg	\$41,212	\$30,658	\$48,469	\$662	\$16,049	\$137,050
Gateway	-\$12,367	-\$11,299	-\$14,545	-\$254	-\$4,850	-\$43,316
Grantsville	\$22,307	\$4,895	\$26,236	\$111	\$5,390	\$58,939
Hagerstown	\$567,271	\$152,329	\$667,171	\$3,209	\$151,508	\$1,541,488
Havre de Grace	\$140,250	\$101,343	\$164,948	\$2,225	\$48,646	\$457,411
Highlandtown	\$64,336	\$32,072	\$75,666	\$698	\$17,375	\$190,148
Leonardtwn	\$24,413	\$16,970	\$28,712	\$368	\$7,972	\$78,435
Oakland	\$95,470	\$50,209	\$112,283	\$1,054	\$26,892	\$285,907
Pennsylvania Ave.	-\$14,625	-\$10,373	-\$17,200	-\$240	-\$3,339	-\$45,777
Salisbury	-\$11,098	\$15,976	-\$13,052	\$186	\$1,932	-\$6,056
Silver Spring	-\$73,846	-\$23,725	-\$86,850	-\$596	-\$34,968	-\$219,985
Snow Hill	-\$9,935	\$43,096	-\$11,684	\$947	\$6,481	\$28,906
Station North	\$120,893	\$185,443	\$142,182	\$4,301	\$68,649	\$521,468
Stevensville	\$127,387	\$33,011	\$149,820	\$685	\$29,820	\$340,723
Wheaton	-\$216,655	-\$78,207	-\$254,809	-\$1,676	-\$95,463	-\$646,809
Total	\$6,195,571	\$8,283,897	\$7,286,640	\$117,890	\$2,317,705	\$24,201,704

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Appendix D—District Websites

Figure 32: A&E District Websites

District	County	Website
Annapolis	Anne Arundel	www.annapolisartsdistrict.org
Bel Air	Harford	www.belairartsandentertainment.org
Berlin	Worcester	www.berlinmainstreet.com
Bethesda	Montgomery	www.bethesda.org
Bromo Tower	Baltimore City	www.bromoartsdistrict.org
Cambridge	Dorchester	www.choosecambridge.com
Catonsville	Baltimore City	www.catonsvilleartsdistrict.org
Chestertown	Kent	www.TownofChestertown.com
Crisfield	Somerset	www.crisfieldarts.org
Cumberland	Allegany	www.alleganyartscouncil.org
Denton	Caroline	www.carolinearts.org
Easton	Talbot	www.discovereaston.com
Elkton	Cecil	www.elktonarts.com
Frederick	Frederick	www.frederickartscouncil.org
Frostburg	Allegany	www.downtownfrostburg.com
Gateway	Prince George's	www.mygatewayarts.com
Grantsville	Garrett	www.garrettarts.org
Hagerstown	Washington	www.hagerstownmd.org
Havre de Grace	Harford	www.hdgartscollective.org
Highlandtown	Baltimore City	www.southeastcdc.org
Leonardtwn	St. Mary's	www.leonardtwnmd.gov
Oakland	Garrett	www.garrettarts.org
Pennsylvania Ave.	Baltimore City	www.blackartsdistrict.org
Salisbury	Wicomico	www.salisburyartsdistrict.com
Silver Spring	Montgomery	www.silverspringdowntown.com
Snow Hill	Worcester	www.snowhillmd.gov
Station North	Baltimore City	www.centralbaltimore.org
Stevensville	Queen Anne's	www.stevensvilleartsandentertainment.org
Wheaton	Montgomery	www.wheatonmd.org

Sources: MSAC, RESI