



MSAC
Arts and Entertainment Districts
Economic Impact Analysis

FY 2024

April 2025

Executive Summary

Founded more than five decades ago, the Maryland State Arts Council (MSAC) is tasked with ensuring that all Marylanders have access to the arts¹. MSAC is housed within Maryland's Department of Commerce and engages in a variety of activities to support the arts ecosystem within the state, including awarding grants to non-profit organizations for arts programming and projects, awarding grants to independent artists, and providing technical assistance and professional development to individuals and groups.

Managed by MSAC, the Arts and Entertainment District (A&E District) program strives 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”².

MSAC requires A&E Districts to complete an annual survey which summarizes activity from the previous fiscal year. These surveys are then provided to Maryland Department of Commerce's Office of Research, Policy, and Government Affairs (ORPGA) staff for tabulation and analysis. This report uses survey responses, secondary data sources, and the IMPLAN model to estimate the economic impacts in FY 24 (July 1, 2023 to June 30, 2024).

Economic impacts were estimated for two types of activity:

- Net employment growth of businesses
- Event/festival-goer spending

Some key takeaways from the economic impact analysis include:

Net New Businesses

- Net new business activity was directly responsible for an estimated 541 jobs, \$66.8 million in economic output, and \$16.9 million in employee compensation.
- When upstream supply chain activity (indirect) and household spending (induced) effects are included, the estimated impacts total 772 jobs, nearly \$113 million in economic output, and \$29.6 million in employee compensation.

Figure ES-1: Statewide Impacts of Net New Businesses in Maryland's A&E Districts in FY 24

	Direct	Indirect	Induced	Total
Employment	541	113	118	772
Output	\$66,802,626	\$23,703,205	\$22,457,165	\$112,962,997
Employee Compensation	\$16,880,216	\$6,168,340	\$6,578,626	\$29,627,183

Source: A&E Districts, IMPLAN

¹ <https://msac.org/about>

² <https://www.msac.org/programs/arts-entertainment-districts>

Event and Festival Attendee Spending

- An estimated 2.7 million people attended A&E District events and festivals in FY 24.
- Attendee spending directly supported an estimated 793 jobs, \$82.8 million in economic output, and \$26.8 million in employee compensation.
- After adding indirect and induced impacts, total employment grows to 1,060, economic output approaches \$136.6 million, and employee compensation exceeds \$42.5 million.

Figure ES-2: Statewide Economic Impacts of Attendee Spending at A&E District Events and Festivals in FY 24

	Direct	Indirect	Induced	Total
Employment	793	133	135	1,060
Output	\$82,817,249	\$28,191,610	\$25,576,451	\$136,585,310
Employee Compensation	\$26,772,930	\$8,253,561	\$7,489,027	\$42,515,518

Source: A&E Districts, IMPLAN

Combined (Net New Business and Spending at Events/Festivals) Impacts

- Figure ES-3 sums the impacts presented in Figures ES-1 and ES-2 to summarize the combined economic impacts of net new business activity and spending at A&E District events/festivals.
- In total (direct + indirect + induced), net new business activity and spending at events/festivals within A&E Districts is associated with more than 1,800 jobs, nearly \$250 million in economic output, and over \$72 million in employee compensation.

Figure ES-3: Combined (Net New Business and Spending at Events/Festivals) Economic Impacts in FY 24

	Direct	Indirect	Induced	Total
Employment	1,334	246	253	1,832
Output	\$149,619,875	\$51,894,815	\$48,033,616	\$249,548,307
Employee Compensation	\$43,653,146	\$14,421,901	\$14,067,653	\$72,142,701

Source: A&E Districts, IMPLAN

Introduction

The Maryland State Arts Council (MSAC) is a state agency tasked with ensuring that all Marylanders have access to the arts. Housed within the Maryland Department of Commerce (Commerce), the council itself is comprised of 17 Maryland residents appointed by the governor and state legislature and is supported by MSAC program staff.

MSAC engages in a variety of activities to support the arts ecosystem within the state. These include awarding grants to non-profit organizations for arts programming and projects, awarding grants to independent artists, and providing technical assistance and professional development to individuals and groups.

As part of their mission, MSAC runs the Arts & Entertainment District (A&E District) program. A&E Districts are designated areas that promote community involvement, tourism, and revitalization through tax-related incentives. Each district is required to submit an annual report to MSAC which describes their activity over the prior year. MSAC has shared these reports with Commerce's Office of Research, Policy, and Government Affairs (ORPGA) for tabulation and analysis.

This document contains an economic impact analysis of net employment growth and spending at events and festivals. Impacts describe activity within the 27 A&E Districts that completed their FY 24 annual report³. Inputs for the economic impact analysis were developed based on information provided by the districts as well as secondary data sources.

Please note that ORPGA did not validate the self-reported data provided by MSAC and the districts. In cases where there was clearly a mistake (for example, an event was listed with a date that was not in FY 24), ORPGA cleaned the data. However, there was no systematic process to confirm every data point contained in the district annual reports. As such, there may be slight variation in the contents of this report and the true activity in Maryland's A&E Districts in FY 24.

Economic Impacts of Net New Businesses

To estimate the impacts of net new businesses, ORPGA used information provided in the A&E Districts' annual reports. In these reports, districts were asked to provide information on businesses, including the type of business and the number of employees, that opened or closed during FY 24. ORPGA used this information to develop inputs for the IMPLAN model. To estimate net new business, the number of employees at businesses that closed was subtracted from the number of employees at businesses that opened. As such, it is possible for a district to have negative net employment impacts if employment at businesses that closed exceeded employment at businesses that opened in the fiscal year.

In cases where a district did not provide employment counts, ORPGA used the median number of employees at businesses for which employment was provided, which was 3 employees. The impacts associated with net new employment at Maryland's A&E Districts are presented below. For additional information on the methodology, please see the methodology appendix. For district-level impacts, please see the data appendix. Please note that totals may not sum due to rounding.

³ The Annapolis A&E District did not submit a FY 24 Annual Report. Consequently, it is not covered in the Economic Impact Analysis.

Figure 1: Statewide Impacts of Net New Businesses in Maryland's A&E Districts in FY 24

	Direct	Indirect	Induced	Total
Employment	541	113	118	772
Output	\$66,802,626	\$23,703,205	\$22,457,165	\$112,962,997
Employee Compensation	\$16,880,216	\$6,168,340	\$6,578,626	\$29,627,183

Source: A&E Districts, IMPLAN

After accounting for closures, A&E District businesses added 541 employees in FY 24 (direct effects). This activity supported 113 additional jobs through upstream supply chain purchases (indirect effects). Both direct and indirect employees spend a portion of their income on a variety of goods and services; this activity supported employment for an additional 118 workers (induced effects). In total, net new business activity in A&E Districts was associated with 772 jobs.

Direct output was over \$66.8 million, while direct employee compensation was nearly \$16.9 million. When secondary effects are considered, total output was nearly \$113.0 million, while total employee compensation exceeded \$29.6 million.

Economic Impacts of Spending at Events and Festivals

Impacts of visitor spending is based on attendance at district events and festivals. All districts were asked to provide information on events and festivals held within their boundaries in FY 24, and many districts included estimated attendance for these events and festivals. In cases where no attendance figures were provided, average attendance from available events/festivals were used as inputs (228 attendees at events; 4,971 attendees at festivals). Across all districts, there were an estimated 1.7 million attendees at events and 1.0 million attendees at festivals, for a total of 2.7 million attendees.

To develop inputs for the IMPLAN model, spending estimates from the *Arts and Economic Prosperity 6* report from Americans for the Arts were utilized.⁴ This report includes a survey of attendees at arts and culture events. It presents spending estimates for attendees of arts and culture events based on attendee type: local; nonlocal; and nonlocal visitor specifically to the arts event. These per-attendee spending figures were used to develop spending estimates for the IMPLAN model based on attendance figures provided by A&E Districts.

These impacts are presented in two different ways:

- Impacts of spending by all attendees at A&E District events and festivals
- Impacts of spending by non-local visitors who traveled specifically for the event or festival

As seen in Figure 2, spending associated with all 2.7 million attendees at A&E District events and festivals in FY 24 supported 1,060 jobs, \$136.6 million in output, and \$42.5 million in employee compensation. The majority of these impacts stem from direct activity (i.e. spending that these attendees engaged in outside of the event or festival, for example, hotel rooms or meals).

⁴ https://aep6.americansforthearts.org/resources/media/user/1696872054-AEP6_National_Findings_Full_Report-Proof_final-web.pdf (pages 17-19)

Figure 2: Economic Impact of Attendee Spending at A&E District Events and Festivals in FY 24

	Direct	Indirect	Induced	Total
Employment	793	133	135	1,060
Output	\$82,817,249	\$28,191,610	\$25,576,451	\$136,585,310
Employee Compensation	\$26,772,930	\$8,253,561	\$7,489,027	\$42,515,518

Source: A&E Districts, IMPLAN

While the overall impacts are useful information, it is also important to recognize impacts associated with attendees who traveled to the region for the specific purpose of attending the event or festival. In the *Americans for the Arts* survey, approximately 23.1 percent of respondents were nonlocal visitors who traveled explicitly to attend events/festivals. These non-local visitors typically spend more while attending events and festivals; this includes elevated expenditures on lodging, food, and local transportation. Consequently, non-local visitors account for roughly 25.4 percent of spending.

Figure 3 shows that economic activity associated with visitor spending at A&E District events and festivals in FY 24 has a total impact of 269 jobs, \$34.7 million in output, and \$10.8 million in employee compensation. Most of the total impact comes from direct impacts, which stem from the visitor spending itself (i.e. visitor hotel rooms or meals).

Figure 3: Economic Impact of Non-local Visitor Spending at A&E District Events and Festivals in FY 24

	Direct	Indirect	Induced	Total
Employment	201	34	34	269
Output	\$21,014,075	\$7,153,348	\$6,489,777	\$34,657,199
Employee Compensation	\$6,793,372	\$2,094,261	\$1,900,268	\$10,787,901

Source: A&E Districts, IMPLAN

Appendix A: Data Appendix

Appendix A.1: Input Data

Figure 4: Estimated Total Attendance and Non-Local Visitor Counts at Events and Festivals in Maryland's A&E Districts in FY 24

District	Total Attendees	Nonlocal Visitors to Arts Events
Bel Air	290,750	67,163
Berlin	59,500	13,745
Bethesda	81,300	18,780
Black Arts	10,133	2,341
Bromo Tower	184,502	42,620
Cambridge	50,736	11,720
Catonsville	75,118	17,352
Chestertown	48,544	11,214
Crisfield	49,508	11,436
Cumberland	24,585	5,679
Denton Artsway	10,014	2,313
Easton	67,350	15,558
Elkton	32,513	7,511
Frederick	271,410	62,696
Frostburg	15,128	3,495
Grantsville	11,258	2,601
Hagerstown	37,514	8,666
Havre de Grace	156,545	36,162
Highlandtown	113,226	26,155
Leonardtown	174,555	40,322
Oakland	24,793	5,727
Salisbury	92,300	21,321
Silver Spring	500,000	115,500
Snow Hill	16,759	3,871
Station North	196,306	45,347
Stevensville	4,885	1,128
Wheaton	102,400	23,654
Total	2,701,632	624,077

Source: A&E Districts, ORPGA

Figure 5: Attendee Breakdown by Category from the Arts and Economic Prosperity 6 Report

Category	Percentage
Local Attendee	70.0%
Non-local Visitor	6.9%
Non-local Visitor who Traveled Explicitly for the Arts Event	23.1%
Total	100.0%

Source: Americans for the Arts, ORPGA

Figure 6: Weighted Average Spending Estimates for Attendees at A&E District Events and Festivals in FY 24

Category	Weighted Average
Offsite Food/Drink	\$14.72
Retail	\$6.56
Overnight Lodging	\$5.20
Local transport	\$4.16
Clothes/Accessories	\$3.18
Supplies/Groceries	\$3.04
Childcare	\$0.64
Other	\$1.51
Total	\$39.01

Source: Americans for the Arts, ORPGA

Appendix A.2: Net New Business Impacts

Figures 7, 8, and 9 examine the economic impacts of net-new businesses within each A&E District. Specifically, net-change in employment was used as the input to IMPLAN. Note that the totals in each district-level table match the summary table (Figure 1).

Figure 7: District-level Employment Impacts of Net New Businesses in Maryland's A&E Districts in FY 24

District	Direct	Indirect	Induced	Total
Bel Air	44	2	3	48
Berlin	36	6	8	50
Bethesda	30	10	7	47
Black Arts District	-5	-1	-1	-7
Bromo Tower	9	-1	1	9
Cambridge	3	5	1	9
Catonsville	17	2	3	22
Chestertown	-3	-1	0	-4
Crisfield	10	2	1	13
Cumberland	25	5	3	33
Denton Artsway	9	3	1	13
Easton	32	14	37	83
Elkton	19	9	3	31
Frederick	28	9	7	44
Frostburg	5	1	0	6
Grantsville	-3	-1	-1	-5
Hagerstown	5	1	0	6
Havre de Grace	-14	-2	-3	-18
Highlandtown	24	-2	2	24
Leonardtown	51	14	11	76
Oakland	15	3	2	20
Salisbury	34	6	5	45
Silver Spring	102	20	17	139
Snow Hill	4	-1	0	4
Station North	9	1	2	12
Stevensville	4	1	1	6
Wheaton	51	7	8	66
Total	541	113	118	772

Source: A&E Districts, IMPLAN, ORPGA

Figure 8: District-Level Output Impacts of Net New Businesses in Maryland's A&E Districts in FY 24

District	Direct	Indirect	Induced	Total
Bel Air	\$1,816,135	-\$263,278	\$481,262	\$2,034,119
Berlin	\$4,862,582	\$1,292,834	\$1,435,753	\$7,591,169
Bethesda	\$5,899,303	\$2,321,066	\$1,267,981	\$9,488,350
Black Arts District	-\$422,980	-\$123,093	-\$220,808	-\$766,881
Bromo Tower	\$718,288	\$14,176	\$187,977	\$920,441
Cambridge	\$1,808,769	\$590,435	\$245,488	\$2,644,693
Catonsville	\$1,468,130	\$444,739	\$544,540	\$2,457,410
Chestertown	-\$188,371	-\$96,636	-\$69,416	-\$354,423
Crisfield	\$910,915	\$352,326	\$262,630	\$1,525,870
Cumberland	\$2,258,632	\$965,509	\$664,175	\$3,888,316
Denton Artsway	\$918,201	\$513,022	\$248,897	\$1,680,121
Easton	\$11,619,284	\$3,233,966	\$6,930,644	\$21,783,894
Elkton	\$2,303,743	\$1,446,540	\$656,583	\$4,406,866
Frederick	\$5,020,339	\$1,968,429	\$1,331,095	\$8,319,863
Frostburg	-\$19,222	\$106,974	-\$42,936	\$44,816
Grantsville	-\$768,662	-\$146,164	-\$223,718	-\$1,138,544
Hagerstown	-\$19,222	\$106,974	-\$42,936	\$44,816
Havre de Grace	-\$1,344,339	-\$385,502	-\$488,850	-\$2,218,692
Highlandtown	\$396,993	\$433,335	\$384,416	\$1,214,744
Leonardtown	\$6,562,426	\$2,849,301	\$2,126,676	\$11,538,404
Oakland	\$1,725,109	\$704,239	\$443,031	\$2,872,379
Salisbury	\$2,871,620	\$1,110,544	\$956,469	\$4,938,633
Silver Spring	\$11,603,911	\$4,492,781	\$3,199,802	\$19,296,495
Snow Hill	\$165,300	-\$97,103	\$82,475	\$150,672
Station North	\$646,617	\$108,612	\$322,913	\$1,078,141
Stevensville	\$674,401	\$234,457	\$210,364	\$1,119,222
Wheaton	\$5,314,722	\$1,524,722	\$1,562,659	\$8,402,103
Total	\$66,802,626	\$23,703,205	\$22,457,165	\$112,962,997

Source: A&E Districts, IMPLAN, ORPGA

Figure 9: District-Level Employee Compensation Impacts of Net New Businesses in Maryland's A&E Districts in FY 24

District	Direct	Indirect	Induced	Total
Bel Air	\$814,112	-\$194,576	\$140,957	\$760,492
Berlin	\$1,542,767	\$353,921	\$420,420	\$2,317,108
Bethesda	\$1,044,044	\$667,827	\$371,280	\$2,083,151
Black Arts District	-\$282,016	-\$41,992	-\$64,643	-\$388,650
Bromo Tower	\$314,072	\$2,716	\$55,017	\$371,805
Cambridge	\$214,094	\$173,748	\$71,860	\$459,703
Catonsville	\$663,278	\$124,425	\$159,432	\$947,135
Chestertown	-\$62,653	-\$27,266	-\$20,327	-\$110,246
Crisfield	\$235,185	\$91,447	\$76,913	\$403,545
Cumberland	\$608,500	\$261,377	\$194,489	\$1,064,366
Denton Artsway	\$159,074	\$133,437	\$72,898	\$365,409
Easton	\$1,520,490	\$668,450	\$2,032,162	\$4,221,102
Elkton	\$390,059	\$410,736	\$192,290	\$993,085
Frederick	\$1,388,993	\$586,704	\$389,704	\$2,365,401
Frostburg	-\$155,689	\$22,274	-\$12,548	-\$145,963
Grantsville	-\$272,235	-\$42,347	-\$65,507	-\$380,089
Hagerstown	-\$155,689	\$22,274	-\$12,548	-\$145,963
Havre de Grace	-\$584,690	-\$136,665	-\$143,121	-\$864,476
Highlandtown	\$520,048	\$39,767	\$112,551	\$672,366
Leonardtown	\$2,054,829	\$850,591	\$622,714	\$3,528,134
Oakland	\$435,875	\$191,839	\$129,715	\$757,428
Salisbury	\$788,940	\$291,259	\$280,151	\$1,360,350
Silver Spring	\$3,219,092	\$1,215,661	\$936,908	\$5,371,661
Snow Hill	\$111,251	-\$19,350	\$24,155	\$116,056
Station North	\$413,443	\$41,951	\$94,549	\$549,943
Stevensville	\$237,957	\$73,426	\$61,588	\$372,971
Wheaton	\$1,717,086	\$406,706	\$457,565	\$2,581,357
Total	\$16,880,216	\$6,168,340	\$6,578,626	\$29,627,183

Source: A&E Districts, IMPLAN, ORPGA

Appendix A.3: Impacts of Total Attendance at A&E District Events and Festivals

Figures 10, 11, and 12 examine the economic impacts of spending by all attendees (locals and nonlocals) of A&E District events and festivals. Note that the totals in each district-level table match the summary table (Figure 2).

Figure 10: Employment Impacts of Total Attendance at A&E District Events and Festivals in FY 24

District	Direct	Indirect	Induced	Total
Bel Air	85	14	14	114
Berlin	17	3	3	23
Bethesda	24	4	4	32
Black Arts District	3	1	1	4
Bromo Tower	54	9	9	72
Cambridge	15	2	3	20
Catonsville	22	4	4	29
Chestertown	14	2	2	19
Crisfield	15	2	2	19
Cumberland	7	1	1	10
Denton Artsway	3	0	1	4
Easton	20	3	3	26
Elkton	10	2	2	13
Frederick	80	13	14	106
Frostburg	4	1	1	6
Grantsville	3	1	1	4
Hagerstown	11	2	2	15
Havre de Grace	46	8	8	61
Highlandtown	33	6	6	44
Leonardtown	51	9	9	68
Oakland	7	1	1	10
Salisbury	27	5	5	36
Silver Spring	147	25	25	196
Snow Hill	5	1	1	7
Station North	58	10	10	77
Stevensville	1	0	0	2
Wheaton	30	5	5	40
Total	793	133	135	1,060

Source: A&E Districts, IMPLAN, ORPGA

Figure 11: Output Impacts of Total Attendance at A&E District Events and Festivals in FY 24

District	Direct	Indirect	Induced	Total
Bel Air	\$8,912,804	\$3,033,985	\$2,752,541	\$14,699,329
Berlin	\$1,823,944	\$620,884	\$563,289	\$3,008,117
Bethesda	\$2,492,213	\$848,368	\$769,670	\$4,110,251
Black Arts District	\$310,622	\$105,738	\$95,929	\$512,290
Bromo Tower	\$5,655,821	\$1,925,284	\$1,746,687	\$9,327,793
Cambridge	\$1,555,288	\$529,432	\$480,320	\$2,565,039
Catonsville	\$2,302,707	\$783,859	\$711,145	\$3,797,710
Chestertown	\$1,488,093	\$506,558	\$459,568	\$2,454,219
Crisfield	\$1,517,644	\$516,617	\$468,694	\$2,502,956
Cumberland	\$753,642	\$256,545	\$232,747	\$1,242,934
Denton Artsway	\$306,974	\$104,496	\$94,803	\$506,274
Easton	\$2,064,582	\$702,799	\$637,605	\$3,404,987
Elkton	\$996,671	\$339,274	\$307,802	\$1,643,747
Frederick	\$8,319,945	\$2,832,171	\$2,569,449	\$13,721,565
Frostburg	\$463,742	\$157,861	\$143,217	\$764,820
Grantsville	\$345,109	\$117,478	\$106,580	\$569,166
Hagerstown	\$1,149,974	\$391,460	\$355,146	\$1,896,580
Havre de Grace	\$4,798,813	\$1,633,552	\$1,482,017	\$7,914,382
Highlandtown	\$3,470,889	\$1,181,517	\$1,071,915	\$5,724,321
Leonardtown	\$5,350,901	\$1,821,487	\$1,652,519	\$8,824,906
Oakland	\$760,018	\$258,716	\$234,716	\$1,253,450
Salisbury	\$2,829,413	\$963,153	\$873,808	\$4,666,374
Silver Spring	\$15,327,263	\$5,217,515	\$4,733,519	\$25,278,297
Snow Hill	\$513,739	\$174,881	\$158,658	\$847,278
Station North	\$6,017,667	\$2,048,459	\$1,858,436	\$9,924,563
Stevensville	\$149,747	\$50,975	\$46,246	\$246,969
Wheaton	\$3,139,023	\$1,068,547	\$969,425	\$5,176,995
Total	\$82,817,249	\$28,191,610	\$25,576,451	\$136,585,310

Source: A&E Districts, IMPLAN, ORPGA

Figure 12: Employee Compensation Impacts of Total Attendance at A&E District Events and Festivals in FY 24

District	Direct	Indirect	Induced	Total
Bel Air	\$2,881,306	\$888,249	\$805,970	\$4,575,526
Berlin	\$589,640	\$181,774	\$164,936	\$936,350
Bethesda	\$805,676	\$248,374	\$225,367	\$1,279,416
Black Arts District	\$100,417	\$30,957	\$28,089	\$159,463
Bromo Tower	\$1,828,398	\$563,659	\$511,447	\$2,903,504
Cambridge	\$502,789	\$155,000	\$140,642	\$798,431
Catonsville	\$744,413	\$229,488	\$208,230	\$1,182,130
Chestertown	\$481,067	\$148,303	\$134,566	\$763,936
Crisfield	\$490,620	\$151,248	\$137,238	\$779,106
Cumberland	\$243,635	\$75,108	\$68,151	\$386,894
Denton Artsway	\$99,238	\$30,593	\$27,759	\$157,590
Easton	\$667,432	\$205,756	\$186,697	\$1,059,885
Elkton	\$322,201	\$99,328	\$90,127	\$511,656
Frederick	\$2,689,649	\$829,165	\$752,359	\$4,271,173
Frostburg	\$149,917	\$46,216	\$41,935	\$238,069
Grantsville	\$111,566	\$34,394	\$31,208	\$177,167
Hagerstown	\$371,760	\$114,606	\$103,990	\$590,357
Havre de Grace	\$1,551,347	\$478,249	\$433,949	\$2,463,545
Highlandtown	\$1,122,059	\$345,909	\$313,867	\$1,781,835
Leonardtown	\$1,729,824	\$533,270	\$483,873	\$2,746,968
Oakland	\$245,696	\$75,743	\$68,727	\$390,167
Salisbury	\$914,685	\$281,979	\$255,859	\$1,452,523
Silver Spring	\$4,954,955	\$1,527,514	\$1,386,019	\$7,868,488
Snow Hill	\$166,080	\$51,199	\$46,457	\$263,736
Station North	\$1,945,375	\$599,720	\$544,168	\$3,089,263
Stevensville	\$48,410	\$14,924	\$13,541	\$76,875
Wheaton	\$1,014,775	\$312,835	\$283,857	\$1,611,466
Total	\$26,772,930	\$8,253,561	\$7,489,027	\$42,515,518

Source: A&E Districts, IMPLAN, ORPGA

Appendix A.4: Non-Local Visitor Spending Impacts

Figures 13, 14, and 15 examine the economic impacts of spending by non-local visitors who travel explicitly for arts events. Note that the totals in each district-level table match the summary table (Figure 3).

Figure 13: Employment Impacts of Non-Local Visitor Spending at A&E District Events and Festivals in FY 24

District	Direct	Indirect	Induced	Total
Bel Air	22	4	4	29
Berlin	4	1	1	6
Bethesda	6	1	1	8
Black Arts District	1	0	0	1
Bromo Tower	14	2	2	18
Cambridge	4	1	1	5
Catonsville	6	1	1	7
Chestertown	4	1	1	5
Crisfield	4	1	1	5
Cumberland	2	0	0	2
Denton Artsway	1	0	0	1
Easton	5	1	1	7
Elkton	2	0	0	3
Frederick	20	3	3	27
Frostburg	1	0	0	2
Grantsville	1	0	0	1
Hagerstown	3	0	0	4
Havre de Grace	12	2	2	16
Highlandtown	8	1	1	11
Leonardtown	13	2	2	17
Oakland	2	0	0	2
Salisbury	7	1	1	9
Silver Spring	37	6	6	50
Snow Hill	1	0	0	2
Station North	15	2	2	20
Stevensville	0	0	0	0
Wheaton	8	1	1	10
Total	201	34	34	269

Source: A&E Districts, IMPLAN, ORPGA

Figure 14: Output Impacts of Non-Local Visitor Spending at A&E District Events and Festivals in FY 24

District	Direct	Indirect	Induced	Total
Bel Air	\$2,261,538	\$769,844	\$698,431	\$3,729,812
Berlin	\$462,808	\$157,543	\$142,929	\$763,281
Bethesda	\$632,375	\$215,265	\$195,296	\$1,042,936
Black Arts District	\$78,817	\$26,830	\$24,341	\$129,989
Bromo Tower	\$1,435,110	\$488,522	\$443,205	\$2,366,837
Cambridge	\$394,639	\$134,338	\$121,876	\$650,854
Catonsville	\$584,290	\$198,897	\$180,446	\$963,632
Chestertown	\$377,589	\$128,534	\$116,611	\$622,734
Crisfield	\$385,088	\$131,087	\$118,927	\$635,101
Cumberland	\$191,229	\$65,096	\$59,057	\$315,382
Denton Artsway	\$77,892	\$26,515	\$24,055	\$128,462
Easton	\$523,868	\$178,329	\$161,786	\$863,982
Elkton	\$252,896	\$86,088	\$78,102	\$417,085
Frederick	\$2,111,105	\$718,636	\$651,973	\$3,481,714
Frostburg	\$117,670	\$40,056	\$36,340	\$194,066
Grantsville	\$87,568	\$29,809	\$27,044	\$144,420
Hagerstown	\$291,795	\$99,329	\$90,115	\$481,239
Havre de Grace	\$1,217,652	\$414,498	\$376,048	\$2,008,198
Highlandtown	\$880,705	\$299,798	\$271,988	\$1,452,491
Leonardtown	\$1,357,739	\$462,185	\$419,311	\$2,239,234
Oakland	\$192,847	\$65,647	\$59,557	\$318,051
Salisbury	\$717,936	\$244,391	\$221,720	\$1,184,047
Silver Spring	\$3,889,145	\$1,323,894	\$1,201,084	\$6,414,123
Snow Hill	\$130,356	\$44,374	\$40,258	\$214,989
Station North	\$1,526,925	\$519,777	\$471,560	\$2,518,262
Stevensville	\$37,997	\$12,934	\$11,735	\$62,666
Wheaton	\$796,497	\$271,133	\$245,982	\$1,313,612
Total	\$21,014,075	\$7,153,348	\$6,489,777	\$34,657,199

Source: A&E Districts, IMPLAN, ORPGA

Figure 15: Employee Compensation Impacts of Non-Local Visitor Spending at A&E District Events and Festivals in FY 24

District	Direct	Indirect	Induced	Total
Bel Air	\$731,104	\$225,385	\$204,507	\$1,160,995
Berlin	\$149,615	\$46,123	\$41,851	\$237,590
Bethesda	\$204,432	\$63,022	\$57,185	\$324,639
Black Arts District	\$25,480	\$7,855	\$7,127	\$40,462
Bromo Tower	\$463,938	\$143,023	\$129,775	\$736,736
Cambridge	\$127,578	\$39,330	\$35,687	\$202,594
Catonsville	\$188,887	\$58,230	\$52,836	\$299,954
Chestertown	\$122,066	\$37,631	\$34,145	\$193,841
Crisfield	\$124,490	\$38,378	\$34,823	\$197,691
Cumberland	\$61,820	\$19,058	\$17,293	\$98,170
Denton Artsway	\$25,181	\$7,763	\$7,044	\$39,987
Easton	\$169,355	\$52,209	\$47,372	\$268,936
Elkton	\$81,755	\$25,204	\$22,869	\$129,828
Frederick	\$682,472	\$210,393	\$190,904	\$1,083,769
Frostburg	\$38,040	\$11,727	\$10,641	\$60,408
Grantsville	\$28,309	\$8,727	\$7,919	\$44,954
Hagerstown	\$94,331	\$29,080	\$26,387	\$149,797
Havre de Grace	\$393,639	\$121,351	\$110,110	\$625,101
Highlandtown	\$284,712	\$87,771	\$79,641	\$452,123
Leonardtwn	\$438,926	\$135,312	\$122,778	\$697,016
Oakland	\$62,343	\$19,219	\$17,439	\$99,001
Salisbury	\$232,092	\$71,549	\$64,922	\$368,564
Silver Spring	\$1,257,272	\$387,592	\$351,689	\$1,996,553
Snow Hill	\$42,141	\$12,991	\$11,788	\$66,920
Station North	\$493,620	\$152,173	\$138,077	\$783,871
Stevensville	\$12,284	\$3,787	\$3,436	\$19,506
Wheaton	\$257,489	\$79,379	\$72,026	\$408,894
Total	\$6,793,372	\$2,094,261	\$1,900,268	\$10,787,901

Source: A&E Districts, IMPLAN, ORPGA

Appendix B: Methodology Appendix

Appendix B.1: Detailed Methods

This project consisted of two separate reports for MSAC: a survey analysis, which involved tabulations of data gleaned from A&E District annual reports, and an economic impact analysis, which is presented in this document. The economic impact analysis was based upon methodologies from past impact reports.

The first component of the impact analysis considered net new business activity in A&E Districts in FY 24 using employment growth. Districts were asked to provide information on the businesses by type that opened or closed within their borders in FY 24 and to provide employment totals for these businesses. Please note that ORPGA did not systematically validate the data. In cases where there were noticeable errors (for example, a business listed as both a retailer and a restaurant), line-item corrections were made. For districts that did not provide employment figures (or that provided incomplete employment figures), the median employment number for all businesses in all districts (3 employees) was utilized. To conduct the IMPLAN analysis, net employment growth (that is, employees added at new businesses less employees lost at closed businesses) was entered into the IMPLAN model based on IMPLAN codes assigned by ORPGA.

The second component of the impact analysis considered spending by attendees at events and festivals held within A&E Districts in FY 24. Districts were asked to provide information on the number of events and festivals as well as estimated attendance. Please note that ORPGA did not systematically validate the data. In cases where there were noticeable errors (for example, an event was listed with dates that fell outside of FY 24), line-item corrections were made. For districts that did not provide estimated attendance information, the average attendance of events or festivals with data (approximately 228 attendees at events and 4,971 attendees at festivals) was utilized.

Survey data from the Americans for the Arts report *Arts and Economic Prosperity 6* (AEP 6) was used to develop inputs to the IMPLAN model.⁵ AEP 6 includes a breakdown of attendees to non-profit arts and culture events as roughly 70 percent local attendees, 30 percent non-local attendees (approximately 77 percent of which are non-local attendees traveling specifically for the arts event, which comes to roughly 23.1 percent of total attendance). AEP 6 also provided spending estimates outside the event itself (e.g., a meal at a restaurant afterwards would be counted, but a ticket to attend the event would not be considered) for attendees by their local or non-local status. ORPGA estimated a weighted average spending amount by category based on local/non-local status and spending category, then multiplied the attendance figures by district to these dollar figures to develop inputs to the IMPLAN model. After each district's IMPLAN run using the weighted average spending was completed, each group's impacts (total attendees, non-local arts-specific visitors) were back-calculated using scaling factors that reflected their group's contribution to the weighted average.

⁵ https://aep6.americansforthearts.org/resources/media/user/1696872054-AEP6_National_Findings_Full_Report-Proof_final-web.pdf pages 17-19

Appendix B.2: IMPLAN Details

The 2023 IMPLAN⁶ model for the state of Maryland was used; this is the most recent data year available. Inputs were run as 2023 dollars; impacts are reported in 2025 dollars.

IMPLAN codes utilized in the net new business analysis varied depending on the type of business opening or closing. IMPLAN codes utilized in the attendee spending analysis were identical across districts and are presented below in Figure 16.

Figure 16: IMPLAN Codes Utilized in Attendee Spending Analysis

Category	Code	Description
Offsite food/drink	491	Full-service restaurants
	492	Limited-service restaurants
	493	All other food and drinking places
Retail	385	Retail - Motor vehicle and parts dealers
	386	Retail - Furniture and home furnishings stores
	387	Retail - Electronics and appliance stores
	388	Retail - Building material and garden equipment and supplies stores
	393	Retail - Sporting goods, hobby, musical instrument and book stores
	394	Retail - General merchandise stores
Overnight lodging	395	Retail - Miscellaneous store retailers
	489	Hotels and motels, including casino hotels
Local transport	490	Other accommodations
	400	Transit and ground passenger transportation
Clothes/accessories	391	Retail - Gasoline stores
	392	Retail - Clothing and clothing accessories stores
Supplies/groceries	389	Retail - Food and beverage stores
	390	Retail - Health and personal care stores
Childcare	476	Child day care services
Other	486	Other amusement and recreation industries

Source: IMPLAN, ORPGA

⁶ More information about IMPLAN can be found at: <https://implan.com/>