

# Maryland Arts and Entertainment Districts Impact Analysis FY 2018

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*Prepared for*  
Maryland State Arts Council

Daraius Irani, Ph.D., Chief Economist  
Michael Siers, Director of Research  
Ellen Bast, Senior Research Associate  
Nick Wetzler, Economist

April 30, 2019



Towson, Maryland 21252 | 410-704-3326 | [www.towson.edu/resi](http://www.towson.edu/resi)

## Table of Contents

1.0	Executive Summary.....	4
1.1	Summary of Findings.....	4
1.1.1	Economic Impacts.....	5
1.1.2	Tax Impacts.....	5
2.0	Introduction.....	6
3.0	Literature Review.....	6
4.0	Findings.....	9
4.1	Economic Impacts.....	9
4.2	Tax Impacts.....	11
5.0	Conclusion.....	13
6.0	References.....	14
	Appendix A—Additional Data for Impact Analyses.....	19
	Appendix B—Methodology.....	24
B.1	IMPLAN Model Overview.....	24
B.2	Input Assumptions.....	24
B.3	Modeling Assumptions.....	29
B.4	Exclusions.....	31
B.5	Limitations of Provided Data.....	32
	Appendix C—Glossary.....	33
	Appendix D—MSAC A&E District Annual Report.....	34
	Appendix E—A&E District Websites.....	50

## Table of Figures

Figure 1: Statewide Economic Impacts of the Nonprofit Arts and Culture Industry, 2015.....	7
Figure 2: Statewide Economic Comparison of Arts and Cultural Production Industries across Mid-Atlantic States, 2016 .....	8
Figure 3: Total Economic Impact Summary, FY 2018 .....	10
Figure 4: Statewide Economic Impacts of Maryland’s A&E Districts by Type of Activity, FY 2018 .....	11
Figure 5: Statewide Total Tax Impacts by Type of Activity in Maryland’s A&E Districts, FY 2018	11
Figure 6: Total Tax Impacts by District, FY 2018 .....	12
Figure 7: Total Employment Impacts by District, FY 2018 .....	20
Figure 8: Total State GDP Impacts by District, FY 2018 .....	21
Figure 9: Total Wage Impacts by District, FY 2018 .....	22
Figure 10: Total Tax Impacts by District, FY 2018 .....	23
Figure 11: Event and Festival Spending Data Summary .....	26
Figure 12: IMPLAN Industry Sectors .....	29
Figure 13: Glossary of Terms .....	33
Figure 14: A&E District Websites .....	50

## 1.0 Executive Summary

The Maryland State Arts Council (MSAC) manages the State of Maryland’s Arts and Entertainment District (A&E district) program. The purpose of the program is to “help develop and promote community involvement, tourism, and revitalization through tax-related incentives that attract artists, arts organizations, and other creative enterprises to towns and cities across the State.”<sup>1</sup> Each A&E district has unique economic development goals and priorities, which can include producing or facilitating events, attracting new businesses, attracting developers, encouraging artists to locate and/or sell artworks in the district’s boundaries, or a combination of strategies.

Each year, MSAC distributes an annual report for each district to complete, allowing each district to highlight the activities undertaken within their district for the past fiscal year (FY). MSAC sought a report detailing the economic and tax impacts of the 25 A&E districts in existence during the study period, FY 2018, on Maryland’s economy.

To achieve the project objective, the Regional Economic Studies Institute (RESI) of Towson University conducted an economic and tax impact analysis of the A&E districts. To quantify these impacts, RESI used the IMPLAN input/output model. For more information regarding IMPLAN and RESI’s methodology (assumptions, exclusions, etc.), please refer to Appendix B. Additionally, a glossary of terms can be found in Appendix C.

This analysis answers the following questions for FY 2018:

1. How many direct, indirect, and induced jobs have the districts supported?
2. How much direct, indirect, and induced economic activity (state GDP) have the districts supported?
3. What are the direct, indirect, and induced employee compensation impacts of the districts?
4. How much in tax revenues have the districts supported for the State of Maryland?

### 1.1 Summary of Findings

Below are RESI’s key findings concerning the economic and tax impacts of the A&E districts for FY 2018.<sup>2</sup> Economic and tax impacts presented in this report are based upon two factors: economic activity from new businesses formed within districts and spending associated with events and festivals held within districts in FY 2018.

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<sup>1</sup> “Arts & Entertainment Districts,” Maryland State Arts Council, accessed April 5, 2019, <https://www.msac.org/programs/arts-entertainment-districts>.

<sup>2</sup> While this analysis takes into account as many variables as possible, it is important to note that a number of assumptions and exclusions were made as a result of missing data and other factors.

### 1.1.1 Economic Impacts

- The A&E districts supported an estimated 7,049 direct, 1,313 indirect, and 1,626 induced jobs (total of 9,987 jobs) during FY 2018. This is an increase from the total employment impact of 8,594 jobs in FY 2016.<sup>3</sup>
  - Of these jobs, 1,753 (1,083 direct, 312 indirect, and 358 induced) were supported by new businesses formed within A&E districts' boundaries.
  - The other 8,234 jobs (5,966 direct, 1,001 indirect, and 1,268 induced) were supported by visitor spending at events and festivals supported by the A&E districts.
- The A&E districts supported more than \$1billion in total state GDP (\$585.6 million in direct state GDP, \$215.3 million in indirect state GDP, and \$238.1 million in induced state GDP) during FY 2018.
  - Approximately \$232.6 million (\$126.7 million in direct state GDP, \$53.5 million in indirect state GDP, and \$52.4 million in induced state GDP) was supported by new businesses formed within A&E districts' boundaries.
  - The remaining \$806.3 million (\$458.9 million in direct state GDP, \$161.8 million in indirect state GDP, and \$185.6 million in induced state GDP) was supported by visitor spending at events and festivals supported by the A&E districts.
- More than \$320.8 million in total wages, comprised of \$188.1 million in direct wages, \$61.8 million in indirect wages, and \$70.9 million in induced wages, was supported by the A&E districts during FY 2018.
  - Approximately \$69.4 million in wages, the sum of \$36.8 million in direct wages, \$16.7 million in indirect wages, and \$15.9 million in induced wages, was supported by new businesses formed within A&E districts' boundaries.
  - The remaining \$251.4 million in wages, comprised of \$151.3 million in direct wages, \$45.1 million in indirect wages, and \$55 million in induced wages, was supported by visitor spending at events and festivals supported by the A&E districts.

### 1.1.2 Tax Impacts

- Economic activity associated with new businesses formed within A&E districts' boundaries during FY 2018 supported more than \$12.5 million in tax revenues.<sup>4</sup>
- Economic activity associated with visitor spending at events and festivals in the A&E districts comprised nearly \$59.6 million in tax revenues during FY 2018.
- The total tax revenue impact of the A&E districts came to approximately \$72.1 million during FY 2018.

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<sup>3</sup> Daraius Irani, Jessica Grimm, and Ellen Bast, "Maryland Arts and Entertainment Districts Impact Analysis FY 2016," Regional Economic Studies Institute of Towson University (October 17, 2017): 4, accessed March 27, 2019. [https://www.msac.org/sites/default/files/files/MSAC%20impact%20analysis%20FY%202016\\_Oct2017.pdf](https://www.msac.org/sites/default/files/files/MSAC%20impact%20analysis%20FY%202016_Oct2017.pdf).

<sup>4</sup> Total tax revenues refer to property, income, sales, payroll, and other tax revenues supported on the state and local levels.

## 2.0 Introduction

The Maryland State Arts Council (MSAC) manages the State of Maryland’s Arts and Entertainment District (A&E district) program, which promotes community and economic development via the arts and cultural activities. Every year, each A&E district within the state completes an annual report to highlight its activities from the prior year. MSAC provided the responses gleaned from these reports to the Regional Economic Studies Institute (RESI) of Towson University. RESI first tabulated this information in a survey analysis and then used this survey analysis as the basis of an economic and tax impact study of Maryland’s 25 A&E districts in FY 2018.

The report will continue as follows:

- Section 3.0 provides a review of relevant literature to contextualize the analysis.
- Section 4.0 presents the economic and tax impact findings from RESI’s analysis.
- Section 5.0 concludes the report.

Additional information regarding RESI’s methodology, modelling assumptions, and background research can be found in the appendices.

## 3.0 Literature Review

To provide additional context to the economic impact analysis as well as explore the presence of arts areas in other regions of the United States, RESI conducted a review of the literature on arts and creative economies and programming. Throughout the country, 15 states have state-level programming in place for cultural districts; these states include Arkansas, California, Colorado, Indiana, Iowa, Kentucky, Louisiana, Maryland, Massachusetts, New Mexico, Oklahoma, Rhode Island, South Carolina, Texas, and West Virginia.<sup>5</sup> Nationwide, there are over 300 cultural districts in these states with established districts that “encourage arts-based economic development and community revitalization.”<sup>6,7</sup>

Maryland’s Arts and Entertainment District (A&E district) program has existed since 2001 and is the second-oldest program of its kind in the country.<sup>8</sup> In most states, these programs fall under the sole authority of a State arts organization. In some states, including Maryland, the programs fall under the authority of a State economic development organization for administration in addition to an arts organization (though the arts organization may be linked to the economic development department), underscoring both the cultural and economic role that these districts play.<sup>9</sup>

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<sup>5</sup> National Assembly of State Arts Agencies, “State Policy Briefs—State Cultural Districts,” 13, accessed March 6, 2019, <https://nasaa-arts.org/wp-content/uploads/2018/05/StateCulturalDistrictsPolicyBrief.pdf>.

<sup>6</sup> *Ibid.*, 1-2.

<sup>7</sup> Please note that while Arkansas has passed legislation to develop Arts and Cultural Districts, no districts currently exist.

<sup>8</sup> National Assembly of State Arts Agencies, “State Policy Briefs—State Cultural Districts,” 13.

<sup>9</sup> *Ibid.*

In addition to the significant role in the community that the arts represent, they can serve as an economic engine as well. In June 2017, Americans for the Arts released *Arts & Economic Prosperity V*, the most current version of the organization’s series of publications on the economic impacts of the nonprofit arts and culture industry at the local and national levels.<sup>10</sup> As calculated in the report, the national nonprofit arts and culture industry in 2015 generated \$166.3 billion in total direct expenditures, supported 4.6 million full-time equivalent jobs, and produced \$96.1 billion in resident household income.<sup>11</sup> Furthermore, economic activity associated with the national nonprofit arts and culture industry supported \$25.7 billion in local, state, and federal government tax revenues.<sup>12</sup>

The *Arts & Economic Prosperity V* report also details the economic impacts of nonprofit arts and cultural industries at the state level.<sup>13</sup> While these results are not directly comparable with RESI’s analysis, they provide insight to the role of arts and culture industries in various state economies. Figure 1 below summarizes the findings of the *Arts & Economic Prosperity V* report for selected states in the Mid-Atlantic region.<sup>14</sup>

**Figure 1: Statewide Economic Impacts of the Nonprofit Arts and Culture Industry, 2015**

State	Direct Expenditures	Full-Time Equivalent Jobs	Resident Household Income	State and Local Tax Revenue
Delaware	\$149,903,883	4,062	\$111,640,000	\$10,452,000
District of Columbia	\$2,906,271,526	39,720	\$1,234,017,000	\$193,041,000 <sup>15</sup>
Maryland	\$961,572,264	25,248	\$643,499,000	\$87,366,000
New Jersey	\$519,814,484	14,342	\$340,048,000	\$40,964,000
Pennsylvania	\$3,388,145,326	100,114	\$2,205,857,000	\$402,116,000

Source: Americans for the Arts

Similarly, to emphasize the role of nonprofit arts and cultural organizations in the national economy, Americans for the Arts compared the percentage of the workforce employed in arts organizations to other selected professions. Employment attributed to nonprofit arts and cultural organizations accounted for 0.83 percent of the U.S. workforce in 2015, a share that was almost twice as large as lawyers, who represented 0.44 percent, and well over double the proportion of farming, fishing, and forestry workers at 0.33 percent.<sup>16</sup> Combined, all arts and

<sup>10</sup> Americans for the Arts, “Arts & Economic Prosperity V: The Economic Impact of Nonprofit Arts & Cultural Organizations and Their Audiences,” 1, accessed March 15, 2019, [http://www.americansforthearts.org/sites/default/files/aep5/PDF\\_Files/NationalFindings\\_StatisticalReport.pdf](http://www.americansforthearts.org/sites/default/files/aep5/PDF_Files/NationalFindings_StatisticalReport.pdf).

<sup>11</sup> Ibid., 4.

<sup>12</sup> Ibid.

<sup>13</sup> Ibid., B-53.

<sup>14</sup> Ibid., B-48, B-53.

<sup>15</sup> Government revenue for the District of Columbia reflects only local government revenue due to the absence of state government.

<sup>16</sup> Americans for the Arts, “Arts & Economic Prosperity V,” 5.

cultural sectors accounted for a larger share of national gross domestic product (GDP) than transportation, construction, or agriculture.<sup>17</sup>

The Bureau of Economic Analysis (BEA) also estimates the economic contributions of the arts and culture via the Arts and Cultural Production Satellite Account (ACPSA).<sup>18</sup> The ACPSA captures the economic impact of both arts-producing industries, such as music organizations and museums, as well as industries that directly support the arts, such as broadcasting.<sup>19</sup> In 2016, the ACPSA found that arts and cultural activity accounted for \$804.2 billion dollars in the U.S. economy, or 4.3 percent of GDP.<sup>20</sup> In addition, arts and cultural production industries nationwide employed over 5 million workers earning nearly \$3.9 billion in compensation in 2016.<sup>21</sup>

The ACPSA analysis also includes data regarding the role of arts and cultural activities in state economies. A summary of this information for various Mid-Atlantic states is found in Figure 2 below. Please note that these numbers are not directly comparable with the economic impact figures presented in Figure 1 nor the numbers that RESI will present later in this report.

**Figure 2: Statewide Economic Comparison of Arts and Cultural Production Industries across Mid-Atlantic States, 2016**

State	Employment	Employment Location Quotient	Compensation (in Thousands)	Compensation Location Quotient
Delaware	9,124	0.63	\$492,340	0.43
District of Columbia	52,516	2.43	\$7,362,861	2.83
Maryland	79,266	0.90	\$5,857,981	0.82
New Jersey	135,712	0.87	\$11,264,017	0.79
Pennsylvania	175,572	0.86	\$11,227,654	0.74
United States	5,039,274	1.00	\$386,213,149	1.00

Source: BEA ACPSA

As seen above, employment and compensation for arts-related industries in the Mid-Atlantic region vary widely: Delaware had both the fewest workers (9,124) and lowest level of total compensation (\$0.5 billion); while Pennsylvania saw the highest number of workers at 175,572, and New Jersey had the highest level of total compensation, at nearly \$11.3 billion. Maryland’s employment of 79,266 fell in the middle of the states compared above, while it had the second-lowest compensation, at nearly \$7.4 billion.

<sup>17</sup> Ibid., 8.

<sup>18</sup> “Arts and Culture,” Bureau of Economic Analysis, March 19, 2019, accessed March 28, 2019, <https://www.bea.gov/data/special-topics/arts-and-culture>.

<sup>19</sup> Ibid.

<sup>20</sup> Ibid.

<sup>21</sup> Bureau of Economic Analysis, “Arts and Culture Continues to Grow in 2016,” 16, March 19, 2019, accessed March 28, 2019, <https://www.bea.gov/system/files/2019-03/acpsa0319.pdf>.

In addition to providing total levels of employment and compensation, the ACPSA also provides location quotients, which describe how concentrated an industry is in an area as compared to the U.S. as a whole. For example, a local industry with a location quotient of 1.0 is proportional to its representation in the U.S.; a location quotient of less than 1.0 indicates that the local industry is relatively less concentrated in the area than in the U.S. as a whole, while a location quotient greater than 1.0 indicates that the industry is more concentrated in a local area than in the U.S. as a whole. As seen in Figure 2, while Maryland’s overall employment and compensation for arts and cultural industries is relatively low compared to the U.S., the state has the Mid-Atlantic’s second-highest location quotients behind only Washington, D.C.

ACPSA data for state employment and compensation recorded by the BEA include both core and supporting industries. The BEA defines core ACPSA industries as “originators of ideas and content associated with the creation of arts and culture.”<sup>22</sup> Supporting ACPSA industries are defined by the BEA as industries that “produce and disseminate arts and cultural commodities.”<sup>23</sup> As a result, the data summarized above includes a very broad range of industries related to arts and cultural production.

The BEA’s findings include industries far beyond the scope of the *Arts & Economic Prosperity V* report, which only refers to the nonprofit arts and culture industry, though, the *Arts & Economic Prosperity V* impact numbers reflect direct, indirect, and induced impacts for the nonprofit arts and culture industry. However, the BEA’s information helps to paint a picture of the total impact that all arts and cultural production-related industries have on state economies.

In contrast, RESI’s analysis estimates the economic impacts from Maryland’s state-designated A&E districts. When making these comparisons, it is important to note that definitions of the industry may vary—whether referred to as the “arts industry,” “cultural industry,” or “creative industry.” While there are limitations associated with comparing other research to RESI’s findings, this comparison can help to frame the industry analysis. As these designations become more widespread, further research regarding their impacts will likely become available.

## 4.0 Findings

This section contains the results of the economic impact analysis of Maryland’s A&E districts for FY 2018 and the tax impact analysis for FY 2018.

### 4.1 Economic Impacts

To determine the economic impacts of Maryland’s A&E districts in FY 2018, RESI used data from annual reports that A&E districts submitted to MSAC, which MSAC then provided to RESI. For information regarding the data provided in the annual report, please refer to Appendix D. A

<sup>22</sup> Bureau of Economic Analysis, “Additional Information—Arts and Cultural Production Satellite Account,” March 19, 2019, accessed March 28, 2019, <https://www.bea.gov/news/2019/arts-and-cultural-production-satellite-account-us-and-states-2016>.

<sup>23</sup> Ibid.

## Maryland Arts and Entertainment Districts Economic Impact Analysis FY 2018

RESI of Towson University

summary of the total economic impacts in the A&E districts—generated by new businesses as well as visitor spending at events and festivals—can be found below in Figure 3. Economic impacts for FY 2018 are presented in 2019 dollars.

**Figure 3: Total Economic Impact Summary, FY 2018<sup>24</sup>**

District	Designation Year	Employment	State GDP	Employee Compensation
Annapolis	2008	327	\$32,892,639	\$10,432,940
Bel Air	2010	593	\$60,924,050	\$19,103,671
Berlin	2005	172	\$16,402,223	\$5,144,424
Bethesda	2002	939	\$135,988,052	\$37,570,512
Bromo Tower	2013	115	\$10,980,927	\$3,361,029
Cambridge	2003	1,329	\$130,203,645	\$40,405,761
Chestertown	2015	110	\$11,565,156	\$4,128,060
Cumberland	2002	421	\$48,728,894	\$15,146,179
Denton	2005	73	\$7,371,687	\$2,309,897
Elkton	2006	80	\$7,839,107	\$2,401,280
Frederick	2003	1,415	\$137,531,809	\$42,179,061
Frostburg	2009	13	\$730,303	\$302,807
Gateway	2002	49	\$4,319,594	\$1,352,618
Grantsville	2015	47	\$4,627,694	\$1,450,925
Hagerstown	2002	239	\$25,527,763	\$7,836,016
Havre de Grace	2008	581	\$58,481,951	\$18,494,512
Highlandtown	2003	34	\$2,781,510	\$992,586
Leonardtwn	2014	187	\$19,506,677	\$7,958,638
Oakland	2017	90	8,802,020	2,750,153
Salisbury	2007	208	\$22,687,493	\$7,420,725
Silver Spring	2002	1,243	\$121,474,045	\$38,167,160
Snow Hill	2006	39	\$3,099,579	\$962,242
Station North	2002	1,372	\$133,845,677	\$41,188,082
Stevensville	2014	15	\$1,547,343	\$481,263
Wheaton	2006	296	\$31,087,956	\$9,283,373
<b>Total</b>		<b>9,987</b>	<b>\$1,038,947,794</b>	<b>\$320,823,916</b>

Sources: IMPLAN, RESI

According to RESI’s analysis of data provided for FY 2018, the A&E districts collectively supported 9,987 jobs, more than \$1billion in state GDP, and over \$320.8 million in employee compensation. In general, districts that are well established, that is, that received designation early in the program’s existence, have large impacts. For a breakdown of statewide impacts, please see Figure 4.

<sup>24</sup> Summed figures throughout the report may not add up exactly to totals due to rounding.

Figure 4: Statewide Economic Impacts of Maryland’s A&E Districts by Type of Activity, FY 2018

	Economic Impact			Total
	Direct	Indirect	Induced	
<i>New Businesses</i>				
Employment	1,083	312	358	1,753
State GDP	\$126,716,448	\$53,475,308	\$52,439,918	\$232,631,674
Employee Compensation	\$36,775,337	\$16,693,172	\$15,946,063	\$69,414,573
<i>Visitor Spending at Events/Festivals</i>				
Employment	5,966	1,001	1,268	8,234
State GDP	\$458,899,350	\$161,805,360	\$185,611,411	\$806,316,121
Employee Compensation	\$151,315,848	\$45,122,299	\$54,971,197	\$251,409,344
<i>New Businesses + Visitor Spending at Events/Festivals</i>				
Employment	7,049	1,313	1,626	9,987
State GDP	\$585,615,798	\$215,280,667	\$238,051,329	\$1,038,947,794
Employee Compensation	\$188,091,185	\$61,815,470	\$70,917,261	\$320,823,916

Sources: BLS, IMPLAN, RESI

As seen in Figure 4, total impacts are driven largely by direct spending at events and festivals. The direct, indirect, induced, and total economic impacts specified for each district by activity type (new businesses and event/festival spending) can be found in Appendix A. For information regarding RESI’s methodology and assumptions, please refer to Appendix B.

#### 4.2 Tax Impacts

RESI also estimated the total tax impacts associated with all 25 A&E districts, found in Figure 5. Input data were provided by districts through annual reports to MSAC, which were subsequently given to RESI.

Figure 5: Statewide Total Tax Impacts by Type of Activity in Maryland’s A&E Districts, FY 2018

	Tax Impact (2019 Dollars)					Total
	Property <sup>25</sup>	Income	Sales	Payroll	Other	
New Businesses	\$3,861,645	\$2,872,058	\$3,990,074	\$111,919	\$1,712,705	\$12,548,401
Event Attendance	\$20,553,823	\$10,105,307	\$21,300,427	\$417,696	\$7,201,934	\$59,579,187
<b>Total</b>	<b>\$24,415,468</b>	<b>\$12,977,365</b>	<b>\$25,290,501</b>	<b>\$529,615</b>	<b>\$8,914,639</b>	<b>\$72,127,588</b>

Sources: IMPLAN, RESI

<sup>25</sup> Tax impacts—specifically, property tax revenues—would traditionally be compared against estimated tax revenue losses associated with the property tax incentives available to and used by A&E districts. Data from the A&E district annual reports indicated that two properties submitted applications for the tax incentive, but neither the annual reports nor information from the State Department of Assessments and Taxation indicated that this application was approved. As a result, RESI omitted this consideration for the analysis. For more information regarding RESI’s reasoning, please refer to Appendix B.

## Maryland Arts and Entertainment Districts Economic Impact Analysis FY 2018

RESI of Towson University

As seen in Figure 5, Maryland's 25 A&E districts supported more than \$72.1 million in state and local tax revenues in FY 2018. The impacts from visitor spending at events and festivals were larger than the impacts from new businesses in the districts. Sales tax revenues represented the plurality of the impacts, followed by property tax revenues.

RESI also estimated the total tax impacts by district, which are presented in Figure 6 below.

**Figure 6: Total Tax Impacts by District, FY 2018**

District	Tax Impact (2019 Dollars)					Total
	Property	Income	Sales	Payroll	Other	
Annapolis	\$863,578	\$419,928	\$895,003	\$17,333	\$299,946	\$2,495,788
Bel Air	\$1,641,630	\$740,982	\$1,702,066	\$31,739	\$564,779	\$4,681,196
Berlin	\$456,536	\$201,283	\$473,402	\$8,547	\$155,032	\$1,294,800
Bethesda	\$1,869,639	\$1,661,176	\$1,928,525	\$62,421	\$896,578	\$6,418,339
Bromo Tower	\$288,123	\$148,007	\$298,511	\$5,585	\$100,517	\$840,743
Cambridge	\$3,379,064	\$1,631,180	\$3,502,174	\$67,131	\$1,176,365	\$9,755,914
Chestertown	\$230,472	\$161,240	\$238,261	\$6,858	\$89,702	\$726,533
Cumberland	\$889,591	\$615,147	\$919,741	\$25,163	\$380,071	\$2,829,713
Denton	\$174,310	\$92,444	\$180,560	\$3,838	\$63,277	\$514,429
Elkton	\$211,934	\$95,037	\$219,744	\$3,990	\$72,703	\$603,408
Frederick	\$3,375,963	\$1,741,488	\$3,497,599	\$70,077	\$1,209,671	\$9,894,798
Frostburg	-\$7,528	\$13,915	-\$8,017	\$503	\$687	-\$440
Gateway	\$120,950	\$56,381	\$125,381	\$2,247	\$39,654	\$344,613
Grantsville	\$121,744	\$57,226	\$126,199	\$2,410	\$42,206	\$349,785
Hagerstown	\$566,452	\$317,825	\$586,548	\$13,019	\$216,852	\$1,700,696
Havre de Grace	\$1,305,836	\$752,758	\$1,351,923	\$30,728	\$488,921	\$3,930,166
Highlandtown	\$327,763	\$414	\$341,624	\$1,649	\$75,169	\$746,619
Leonardtwn	\$548,219	\$238,869	\$568,507	\$9,815	\$185,956	\$1,551,366
Oakland	\$221,914	\$107,087	\$229,998	\$4,569	\$77,909	\$641,477
Salisbury	\$495,792	\$281,853	\$513,339	\$12,329	\$191,227	\$1,494,540
Silver Spring	\$3,102,961	\$1,522,472	\$3,215,713	\$63,412	\$1,086,484	\$8,991,042
Snow Hill	\$74,586	\$45,063	\$77,192	\$1,598	\$26,658	\$225,097
Station North	\$3,382,825	\$1,679,380	\$3,505,507	\$68,431	\$1,192,690	\$9,828,833
Stevensville	\$41,890	\$18,998	\$43,431	\$799	\$14,341	\$119,459
Wheaton	\$731,224	\$377,212	\$757,570	\$15,424	\$267,244	\$2,148,674
<b>Total</b>	<b>\$24,415,468</b>	<b>\$12,977,365</b>	<b>\$25,290,501</b>	<b>\$529,615</b>	<b>\$8,914,639</b>	<b>\$72,127,588</b>

Source: IMPLAN, RESI

As seen in Figure 6, reported business growth and visitor spending in Frederick had the largest tax impact across all of Maryland's A&E districts. In FY 2018, reported activity in Frederick supported more than \$9.9 million in tax revenues, comprised primarily of sales and property taxes. Reported activity in Station North generated the second-highest amount of tax impacts, at \$9.8 million. For more information regarding tax impacts by district, please see Appendix A.

## 5.0 Conclusion

The existence of cultural districts has a positive impact on Maryland’s economy. In the case of Maryland’s A&E districts, operations supported an estimated total of 9,987 jobs during FY 2018. Of these jobs, 1,753 were supported by new businesses, while the remaining 8,234 were supported by visitor spending at events and festivals. In addition, more than \$1 billion in total state GDP was supported by the A&E districts during the study period—\$232.6 million by new businesses and \$806.3 million by visitor spending. Moreover, total employee compensation of more than \$320.8 million was supported by the A&E districts during FY 2018. Approximately \$69.4 million in employee compensation were supported by new businesses and \$251.4 million were supported by visitor spending at events and festivals

New businesses formed within the A&E districts’ boundaries during the study period supported more than \$12.5 million in state and local tax revenues.<sup>26</sup> Visitor spending at events and festivals within the A&E districts supported nearly \$59.6 million in state and local tax revenues. The total tax revenue impact of the A&E districts came to approximately \$72.1 million during the study period.

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<sup>26</sup> Total tax revenues refer to property, income, sales, payroll, and other tax revenues supported on the state and local level.

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## Appendix A—Additional Data for Impact Analyses

Appendix A presents additional data that informed the impact analyses analysis in Section 4.0.

Figures 7 through 9 detail the breakdown of economic impacts generated by each of Maryland’s 25 A&E districts. In each figure, the impact of visitor spending at events and festivals is larger than the impact of new businesses, and direct impacts are greater than indirect or induced impacts. Please note that Stevensville did not report any net new businesses in FY 2018. Please also note that totals may not sum exactly due to rounding. Figure 10 provides detailed information on total tax impacts for each district by activity type. Impacts are presented in 2019 dollars.

**Maryland Arts and Entertainment Districts Economic Impact Analysis FY 2018**  
RESI of Towson University

**Figure 7: Total Employment Impacts by District, FY 2018**

District	Direct	Indirect	Induced	Total
<b>New Businesses</b>				
Annapolis	12	3	6	20
Bel Air	50	11	13	75
Berlin	40	6	7	53
Bethesda	331	167	164	663
Bromo Tower	70	10	15	96
Cambridge	53	12	11	76
Chestertown	1	1	2	4
Cumberland	136	33	42	211
Denton	7	2	2	10
Elkton	8	1	1	10
Frederick	64	7	13	85
Frostburg	-15	-2	-4	-21
Gateway	-1	-1	-1	-2
Grantsville	2	0	0	3
Hagerstown	33	8	12	53
Havre de Grace	67	13	20	101
Highlandtown	-13	-5	-9	-27
Leonardtown	39	9	10	58
Oakland	-7	-1	-1	-9
Salisbury	17	0	8	25
Silver Spring	60	5	15	80
Snow Hill	17	2	3	21
Station North	14	5	4	22
Stevensville	N/A	N/A	N/A	N/A
Wheaton	97	26	24	148
<b>Subtotal</b>	<b>1,083</b>	<b>312</b>	<b>358</b>	<b>1,753</b>
<b>Event/Festival Spending</b>				
Annapolis	225	35	47	307
Bel Air	377	61	80	518
Berlin	86	15	18	119
Bethesda	203	31	42	276
Bromo Tower	13	2	3	19
Cambridge	912	149	193	1,253
Chestertown	73	14	19	106
Cumberland	146	29	36	211
Denton	45	8	10	63
Elkton	51	8	11	70
Frederick	958	167	205	1,330
Frostburg	25	4	5	34
Gateway	37	6	8	51
Grantsville	32	5	7	44
Hagerstown	135	23	28	186
Havre de Grace	345	60	74	480
Highlandtown	44	7	9	61
Leonardtown	94	16	20	129
Oakland	72	12	15	99
Salisbury	132	23	28	183
Silver Spring	847	140	176	1,163
Snow Hill	13	2	3	18
Station North	982	161	206	1,350
Stevensville	11	2	2	15
Wheaton	107	18	23	148
<b>Subtotal</b>	<b>5,966</b>	<b>1,001</b>	<b>1,268</b>	<b>8,234</b>
<b>Total</b>	<b>7,049</b>	<b>1,313</b>	<b>1,626</b>	<b>9,987</b>

Sources: IMPLAN, RESI

# Maryland Arts and Entertainment Districts Economic Impact Analysis FY 2018

RESI of Towson University

**Figure 8: Total State GDP Impacts by District, FY 2018**

District	Direct	Indirect	Induced	Total
<b>New Businesses</b>				
Annapolis	\$1,351,438	\$428,287	\$806,058	\$2,585,783
Bel Air	\$5,068,797	\$2,015,283	\$1,982,049	\$9,066,130
Berlin	\$2,607,686	\$1,023,006	\$1,036,717	\$4,667,410
Bethesda	\$56,313,001	\$28,076,991	\$24,032,650	\$108,422,642
Bromo Tower	\$5,033,544	\$1,855,732	\$2,269,429	\$9,158,705
Cambridge	\$3,852,556	\$1,710,395	\$1,649,763	\$7,212,714
Chestertown	\$197,107	\$167,589	\$220,867	\$585,563
Cumberland	\$15,828,618	\$5,866,802	\$6,071,098	\$27,766,517
Denton	\$699,422	\$277,859	\$281,850	\$1,259,131
Elkton	\$581,345	\$152,533	\$185,773	\$919,651
Frederick	\$5,536,555	\$1,239,077	\$1,966,411	\$8,742,043
Frostburg	-\$1,716,992	-\$408,571	-\$525,665	-\$2,651,228
Gateway	-\$433,625	-\$96,978	-\$107,605	-\$638,207
Grantsville	\$151,336	\$48,681	\$67,893	\$267,909
Hagerstown	\$4,231,458	\$1,408,901	\$1,695,157	\$7,335,516
Havre de Grace	\$6,366,497	\$2,326,399	\$2,967,436	\$11,660,333
Highlandtown	-\$1,417,989	-\$643,347	-\$1,303,713	-\$3,365,049
Leonardtown	\$3,781,203	\$1,434,411	\$1,491,417	\$6,707,031
Oakland	-\$486,013	-\$157,196	-\$206,797	-\$850,007
Salisbury	\$2,953,826	\$548,037	\$1,152,988	\$4,654,852
Silver Spring	\$4,437,476	\$1,464,292	\$2,189,746	\$8,091,514
Snow Hill	\$631,197	\$270,192	\$415,741	\$1,317,130
Station North	\$1,973,597	\$573,605	\$516,719	\$3,063,920
Stevensville	N/A	N/A	N/A	N/A
Wheaton	\$9,174,409	\$3,893,326	\$3,583,935	\$16,651,671
<b>Subtotal</b>	<b>\$126,716,448</b>	<b>\$53,475,308</b>	<b>\$52,439,918</b>	<b>\$232,631,674</b>
<b>Event/Festival Spending</b>				
Annapolis	\$17,509,510	\$5,892,994	\$6,904,352	\$30,306,856
Bel Air	\$29,988,314	\$10,193,736	\$11,675,870	\$51,857,920
Berlin	\$6,682,278	\$2,382,566	\$2,669,970	\$11,734,814
Bethesda	\$16,067,798	\$5,309,045	\$6,188,567	\$27,565,410
Bromo Tower	\$1,023,472	\$374,526	\$424,224	\$1,822,221
Cambridge	\$70,301,152	\$24,398,129	\$28,291,650	\$122,990,931
Chestertown	\$6,002,933	\$2,225,789	\$2,750,871	\$10,979,593
Cumberland	\$11,375,882	\$4,365,781	\$5,220,713	\$20,962,376
Denton	\$3,445,343	\$1,249,765	\$1,417,448	\$6,112,556
Elkton	\$3,986,872	\$1,369,187	\$1,563,396	\$6,919,455
Frederick	\$72,556,968	\$26,285,022	\$29,947,775	\$128,789,765
Frostburg	\$1,916,240	\$687,383	\$777,908	\$3,381,531
Gateway	\$2,819,852	\$998,104	\$1,139,846	\$4,957,802
Grantsville	\$2,493,088	\$880,952	\$985,745	\$4,359,785
Hagerstown	\$10,369,220	\$3,687,071	\$4,135,956	\$18,192,248
Havre de Grace	\$26,458,335	\$9,515,904	\$10,847,380	\$46,821,619
Highlandtown	\$3,536,507	\$1,224,295	\$1,385,757	\$6,146,559
Leonardtown	\$7,342,075	\$2,562,227	\$2,895,343	\$12,799,646
Oakland	\$5,497,605	\$1,973,321	\$2,181,101	\$9,652,027
Salisbury	\$10,296,457	\$3,682,325	\$4,053,859	\$18,032,641
Silver Spring	\$64,830,487	\$22,761,402	\$25,790,642	\$113,382,531
Snow Hill	\$1,021,597	\$361,089	\$399,764	\$1,782,450
Station North	\$74,316,795	\$26,186,676	\$30,278,286	\$130,781,757
Stevensville	\$889,970	\$307,846	\$349,527	\$1,547,343
Wheaton	\$8,170,599	\$2,930,225	\$3,335,461	\$14,436,285
<b>Subtotal</b>	<b>\$458,899,350</b>	<b>\$161,805,360</b>	<b>\$185,611,411</b>	<b>\$806,316,121</b>
<b>Total</b>	<b>\$585,615,798</b>	<b>\$215,280,667</b>	<b>\$238,051,329</b>	<b>\$1,038,947,794</b>

Sources: IMPLAN, RESI

# Maryland Arts and Entertainment Districts Economic Impact Analysis FY 2018

RESI of Towson University

**Figure 9: Total Employee Compensation Impacts by District, FY 2018**

District	Direct	Indirect	Induced	Total
<b>New Businesses</b>				
Annapolis	\$532,684	\$152,836	\$238,709	\$924,229
Bel Air	\$1,760,647	\$610,654	\$587,240	\$2,958,541
Berlin	\$935,177	\$267,810	\$307,143	\$1,510,130
Bethesda	\$12,471,480	\$9,351,727	\$7,117,654	\$28,940,861
Bromo Tower	\$1,614,959	\$511,748	\$672,154	\$2,798,861
Cambridge	\$1,112,818	\$460,859	\$488,633	\$2,062,310
Chestertown	\$205,562	\$45,588	\$65,391	\$316,541
Cumberland	\$4,715,290	\$1,655,473	\$1,797,229	\$8,167,992
Denton	\$262,138	\$74,978	\$83,506	\$420,622
Elkton	\$146,547	\$41,565	\$54,992	\$243,104
Frederick	\$1,483,699	\$285,507	\$582,006	\$2,351,211
Frostburg	-\$468,541	-\$120,779	-\$155,728	-\$745,048
Gateway	-\$139,907	-\$23,477	-\$31,873	-\$195,257
Grantsville	\$63,274	\$12,818	\$20,100	\$96,192
Hagerstown	\$1,289,933	\$409,675	\$502,111	\$2,201,719
Havre de Grace	\$2,489,283	\$628,246	\$878,452	\$3,995,981
Highlandtown	-\$297,943	-\$235,074	-\$385,622	-\$918,639
Leonardtown	\$2,404,607	\$717,571	\$857,141	\$3,979,319
Oakland	-\$136,098	-\$43,388	-\$61,204	-\$240,690
Salisbury	\$1,298,615	\$192,585	\$341,650	\$1,832,850
Silver Spring	\$1,913,475	\$436,806	\$648,670	\$2,998,951
Snow Hill	\$209,088	\$76,528	\$123,092	\$408,708
Station North	\$193,200	\$152,651	\$152,986	\$498,837
Stevensville	N/A	N/A	N/A	N/A
Wheaton	\$2,715,350	\$1,030,268	\$1,061,632	\$4,807,250
<b>Subtotal</b>	<b>\$36,775,337</b>	<b>\$16,693,172</b>	<b>\$15,946,063</b>	<b>\$69,414,573</b>
<b>Event/Festival Spending</b>				
Annapolis	\$5,820,514	\$1,642,894	\$2,045,302	\$9,508,711
Bel Air	\$9,835,075	\$2,851,242	\$3,458,813	\$16,145,130
Berlin	\$2,180,185	\$663,190	\$790,919	\$3,634,294
Bethesda	\$5,314,021	\$1,482,326	\$1,833,305	\$8,629,651
Bromo Tower	\$332,559	\$103,948	\$125,661	\$562,169
Cambridge	\$23,173,623	\$6,789,127	\$8,380,700	\$38,343,451
Chestertown	\$2,320,639	\$676,497	\$814,383	\$3,811,520
Cumberland	\$4,149,772	\$1,282,943	\$1,545,472	\$6,978,187
Denton	\$1,121,947	\$347,727	\$419,601	\$1,889,275
Elkton	\$1,311,579	\$383,765	\$462,833	\$2,158,177
Frederick	\$23,653,034	\$7,309,544	\$8,865,272	\$39,827,850
Frostburg	\$626,021	\$191,401	\$230,433	\$1,047,856
Gateway	\$933,012	\$277,429	\$337,434	\$1,547,876
Grantsville	\$816,650	\$246,262	\$291,821	\$1,354,733
Hagerstown	\$3,385,714	\$1,023,397	\$1,225,186	\$5,634,297
Havre de Grace	\$8,633,350	\$2,654,064	\$3,211,116	\$14,498,531
Highlandtown	\$1,155,867	\$345,114	\$410,244	\$1,911,224
Leonardtown	\$2,404,607	\$717,571	\$857,141	\$3,979,319
Oakland	\$1,795,835	\$549,316	\$645,693	\$2,990,844
Salisbury	\$3,361,067	\$1,025,915	\$1,200,892	\$5,587,875
Silver Spring	\$21,222,479	\$6,305,808	\$7,639,923	\$35,168,210
Snow Hill	\$334,517	\$100,593	\$118,425	\$553,535
Station North	\$24,467,764	\$7,252,426	\$8,969,056	\$40,689,245
Stevensville	\$291,434	\$86,288	\$103,542	\$481,263
Wheaton	\$2,674,582	\$813,510	\$988,030	\$4,476,123
<b>Subtotal</b>	<b>\$151,315,848</b>	<b>\$45,122,299</b>	<b>\$54,971,197</b>	<b>\$251,409,344</b>
<b>Total</b>	<b>\$188,091,185</b>	<b>\$61,815,470</b>	<b>\$70,917,261</b>	<b>\$320,823,916</b>

Sources: IMPLAN, RESI

## Maryland Arts and Entertainment Districts Economic Impact Analysis FY 2018

### RESI of Towson University

Figure 10: Total Tax Impacts by District, FY 2018

District	Property	Income	Sales	Payroll	Other	Total
<b>New Businesses</b>						
Annapolis	\$16,886	\$44,664	\$17,057	\$1,535	\$13,688	\$93,830
Bel Air	\$215,427	\$106,677	\$223,243	\$4,915	\$79,536	\$629,798
Berlin	\$160,908	\$55,969	\$167,034	\$2,509	\$51,009	\$437,429
Bethesda	\$1,081,057	\$1,325,306	\$1,110,667	\$48,083	\$632,287	\$4,197,400
Bromo Tower	\$244,875	\$124,848	\$253,715	\$4,651	\$84,911	\$713,000
Cambridge	\$138,863	\$90,631	\$143,635	\$3,426	\$55,634	\$432,189
Chestertown	\$12,543	\$11,939	\$12,929	\$526	\$4,711	\$42,648
Cumberland	\$486,123	\$330,624	\$502,666	\$13,570	\$220,334	\$1,553,317
Denton	\$26,078	\$15,170	\$26,997	\$699	\$10,249	\$79,193
Elkton	\$24,918	\$10,148	\$25,849	\$404	\$8,672	\$69,991
Frederick	\$249,995	\$108,441	\$259,252	\$3,906	\$91,744	\$713,338
Frostburg	-\$91,606	-\$28,474	-\$95,136	-\$1,238	-\$29,063	-\$245,517
Gateway	-\$6,179	-\$5,628	-\$6,372	-\$325	-\$4,752	-\$23,256
Grantsville	\$8,320	\$3,675	\$8,628	\$160	\$2,795	\$23,578
Hagerstown	\$107,268	\$92,745	\$110,677	\$3,658	\$55,411	\$369,759
Havre de Grace	\$143,602	\$161,586	\$147,712	\$6,639	\$77,019	\$536,558
Highlandtown	\$159,883	-\$74,837	\$167,558	-\$1,526	\$17,867	\$268,945
Leonardtwn	\$210,048	\$81,578	\$217,943	\$3,204	\$69,130	\$581,903
Oakland	-\$19,937	-\$11,434	-\$20,642	-\$400	-\$7,339	-\$59,752
Salisbury	\$38,810	\$61,541	\$39,704	\$3,045	\$30,922	\$174,022
Silver Spring	\$195,400	\$119,094	\$202,218	\$4,983	\$70,594	\$592,289
Snow Hill	\$28,558	\$23,349	\$29,482	\$679	\$10,633	\$92,701
Station North	\$56,666	\$29,062	\$58,710	\$829	\$26,305	\$171,572
Stevensville	N/A	N/A	N/A	N/A	N/A	N/A
Wheaton	\$373,139	\$195,384	\$386,548	\$7,987	\$140,408	\$1,103,466
<b>Subtotal</b>	<b>\$3,861,645</b>	<b>\$2,872,058</b>	<b>\$3,990,074</b>	<b>\$111,919</b>	<b>\$1,712,705</b>	<b>\$12,548,401</b>
<b>Event/Festival Spending</b>						
Annapolis	\$846,692	\$375,264	\$877,946	\$15,798	\$286,258	\$2,401,958
Bel Air	\$1,426,203	\$634,305	\$1,478,823	\$26,824	\$485,243	\$4,051,398
Berlin	\$295,628	\$145,314	\$306,368	\$6,038	\$104,023	\$857,371
Bethesda	\$788,582	\$335,870	\$817,858	\$14,338	\$264,291	\$2,220,939
Bromo Tower	\$43,248	\$23,159	\$44,796	\$934	\$15,606	\$127,743
Cambridge	\$3,240,201	\$1,540,549	\$3,358,539	\$63,705	\$1,120,731	\$9,323,725
Chestertown	\$217,929	\$149,301	\$225,332	\$6,332	\$84,991	\$683,885
Cumberland	\$403,468	\$284,523	\$417,075	\$11,593	\$159,737	\$1,276,396
Denton	\$148,232	\$77,274	\$153,563	\$3,139	\$53,028	\$435,236
Elkton	\$187,016	\$84,889	\$193,895	\$3,586	\$64,031	\$533,417
Frederick	\$3,125,968	\$1,633,047	\$3,238,347	\$66,171	\$1,117,927	\$9,181,460
Frostburg	\$84,078	\$42,389	\$87,119	\$1,741	\$29,750	\$245,077
Gateway	\$127,129	\$62,009	\$131,753	\$2,572	\$44,406	\$367,869
Grantsville	\$113,424	\$53,551	\$117,571	\$2,250	\$39,411	\$326,207
Hagerstown	\$459,184	\$225,080	\$475,871	\$9,361	\$161,441	\$1,330,937
Havre de Grace	\$1,162,234	\$591,172	\$1,204,211	\$24,089	\$411,902	\$3,393,608
Highlandtown	\$167,880	\$75,251	\$174,066	\$3,175	\$57,302	\$477,674
Leonardtwn	\$338,171	\$157,291	\$350,564	\$6,611	\$116,826	\$969,463
Oakland	\$241,851	\$118,521	\$250,640	\$4,969	\$85,248	\$701,229
Salisbury	\$456,982	\$220,312	\$473,635	\$9,284	\$160,305	\$1,320,518
Silver Spring	\$2,907,561	\$1,403,378	\$3,013,495	\$58,429	\$1,015,890	\$8,398,753
Snow Hill	\$46,028	\$21,714	\$47,710	\$919	\$16,025	\$132,396
Station North	\$3,326,159	\$1,650,318	\$3,446,797	\$67,602	\$1,166,385	\$9,657,261
Stevensville	\$41,890	\$18,998	\$43,431	\$799	\$14,341	\$119,459
Wheaton	\$358,085	\$181,828	\$371,022	\$7,437	\$126,836	\$1,045,208
<b>Subtotal</b>	<b>\$20,553,823</b>	<b>\$10,105,307</b>	<b>\$21,300,427</b>	<b>\$417,696</b>	<b>\$7,201,934</b>	<b>\$59,579,187</b>
<b>Total</b>	<b>\$24,415,468</b>	<b>\$12,977,365</b>	<b>\$25,290,501</b>	<b>\$529,615</b>	<b>\$8,914,639</b>	<b>\$72,127,588</b>

Sources: IMPLAN, RESI

## Appendix B—Methodology

### B.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 employment 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 the districts create jobs and hires workers to support activities in the district. The indirect economic impacts occur as the vendors purchase goods and services from other firms. In either case, 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.<sup>27</sup>

### B.2 Input Assumptions

The project team extracted all relevant data from A&E district annual reports. In addition, RESI made assumptions regarding A&E district operations where actual data were not available.

Economic impacts were determined based on two main factors: (1) estimated new direct employment occurring after A&E district designation as the attraction of new firms could primarily be attributed to the designation, and (2) estimated spending by attendees at events and festivals. For the most part, this information was provided by the A&E districts or MSAC. However, in some cases, these data were not provided in the annual reports. In instances where the number of employees was not provided in the annual report, RESI estimated this figure utilizing a calculation of the average number of employees per square foot with an estimate of the average floor area by district. To estimate attendance figures when they were not provided in annual reports, RESI utilized average attendance at similar events from all A&E districts that did report this information for FY 2018. "Similar events" are defined by the

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<sup>27</sup> Total economic impact is defined as the sum of direct, indirect, and induced effects.

following categories: community events, cultural events, film events, fine arts events, food events, holiday events, performing arts events, and other events.

To determine event and festival spending inputs, RESI researched comparable events and the associated visitor spending figures and attendance to estimate percentage spending levels for hotels, transportation, food and beverage, retail, entertainment, and other spending. A summary of the findings from RESI's review can be found in Figure 11.

**Maryland Arts and Entertainment Districts Economic Impact Analysis FY 2018**  
RESI of Towson University

**Figure 11: Event and Festival Spending Data Summary<sup>28</sup>**

Events/Festivals	Hotels	Transportation	Food and Beverage	Retail Sales	Entertainment	Other	Total Spending	Total Attendance
<b>Community</b>								
Dolores River Festival (2011)	\$935	\$8,121	\$36,957	\$13,995	N/A	N/A	\$60,008	2,225
Family Gras Weekend in Jefferson Parish (2011)	\$892,516	\$91,708	\$2,741,058	\$656,871	\$2,191,123	N/A	\$6,573,276	85,000
Market Street Festival in Ocean Springs (2010)	\$2,182,532	\$1,899,124	\$6,003,997	\$2,388,666	\$2,309,157	N/A	\$14,783,476	34,000
Light City Baltimore (2018)	\$2,242,450	\$3,852,570	\$7,986,700	\$2,134,300	\$2,004,560	N/A	\$18,220,580	442,500
<b>AVERAGE PER CAPITA</b>	<b>\$20</b>	<b>\$17</b>	<b>\$61</b>	<b>\$22</b>	<b>\$33</b>	<b>\$0</b>		
<b>Culture</b>								
Bayou Boogaloo Festival (2011)	\$150,413	\$47,070	\$285,080	\$62,808	\$197,934	N/A	\$743,305	27,000
Irish Fair of Minnesota (2011)	\$305,820	\$523,800	\$2,798,660	\$1,193,010	N/A	\$154,380	\$4,975,670	100,000
San Diego Pride (2018)	\$2,400,000	N/A	\$4,050,000	\$3,300,000	\$4,050,000	N/A	\$13,800,000	251,839
Twin Cities Pride Festival & Parade (2010)	\$4,488,242	\$1,037,402	\$10,374,925	\$2,297,011	\$1,267,616	\$2,285,680	\$21,750,875	400,000
<b>AVERAGE PER CAPITA</b>	<b>\$7</b>	<b>\$3</b>	<b>\$20</b>	<b>\$8</b>	<b>\$9</b>	<b>\$4</b>		
<b>Film</b>								
Sundance Film Festival (2018)	\$62,603,231	\$20,240,865	\$40,369,794	N/A	\$49,954,512	\$10,546,203	\$183,714,605	124,985
Big Sky Documentary Film Festival (2009)	\$2,167,340	\$216,734	\$11,582,802	\$464,156	\$186,046	\$310,716	\$14,927,794	9,590
Durango Film Fest (2009)	\$7,921	\$3,993	\$19,064	\$5,545	N/A	\$1,792	\$38,315	425

<sup>28</sup> "Average" refers to the average weighted spending per capita for each spending category.

## Maryland Arts and Entertainment Districts Economic Impact Analysis FY 2018

RESI of Towson University

Events/Festivals	Hotels	Transportation	Food and Beverage	Retail Sales	Entertainment	Other	Total Spending	Total Attendance
The Eugene International Film Festival (2010)	\$190,368	\$11,340	\$80,220	\$61,320	\$57,540	\$22,680	\$423,468	32,457
<b>AVERAGE PER CAPITA</b>	<b>\$188</b>	<b>\$49</b>	<b>\$395</b>	<b>\$21</b>	<b>\$140</b>	<b>\$30</b>		
<b>Fine Art</b>								
Columbus Arts Festival (2010)	\$1,564,500	\$675,500	\$4,564,000	\$2,569,000	N/A	\$612,500	\$9,985,500	350,000
Peter Anderson (2010)	\$3,744,387	\$1,270,196	\$2,735,131	\$9,224,279	N/A	\$5,691,227	\$22,665,220	104,562
Artscape (2012)	\$760,865	\$1,157,121	\$6,699,565	\$6,326,063	\$1,036,983	\$527,371	\$16,507,968	350,000
Fort Worth Arts Festival (2006)	\$665,047	\$901,356	\$139,391	\$2,181,367	\$45,995	\$109,991	\$4,043,147	198,811
<b>AVERAGE PER CAPITA</b>	<b>\$11</b>	<b>\$5</b>	<b>\$15</b>	<b>\$31</b>	<b>\$2</b>	<b>\$15</b>		
<b>Food</b>								
Oregon Brewers Fest (2014)	\$9,100,000	N/A	\$8,200,000	N/A	N/A	N/A	\$17,300,000	25,668
Economic Impact of Fiesta Oyster Bake (2007)	\$519,181	\$541,622	\$2,245,156	\$163,114	\$8,642	\$171,938	\$3,649,653	52,189
Iowa Food Festivals (2005)	\$589,514	\$227,027	\$579,703	\$270,402	N/A	N/A	\$1,666,645	22,806
Lodi Grape Festival & Harvest Fair (2003)	\$1,928,321	\$164,428	N/A	\$1,305,689	\$3,204,549	\$1,328,723	\$7,931,710	173,850
<b>AVERAGE PER CAPITA</b>	<b>\$100</b>	<b>\$7</b>	<b>\$129</b>	<b>\$7</b>	<b>\$9</b>	<b>\$5</b>		
<b>Holiday</b>								
Pennsylvania Christmas Craft and Gift Show (2012)	\$104,912	\$107,571	\$197,532	\$205,636	N/A	\$8,837	\$624,488	24,710
Lahaina Halloween Festival (2009)	\$855,258	N/A	\$283,419	\$398,411	N/A	N/A	\$1,537,088	5,264
Light in Winter Festival (2007)	\$26,055	\$12,711	\$18,564	\$38,319	\$6,384	N/A	\$102,033	3,000
Riverfest in Arkansas (2009)	\$30,026,653	\$13,284,169	\$43,249,399	\$17,896,496	\$13,142,710	\$6,784,475	\$124,383,902	186,131
<b>AVERAGE PER CAPITA</b>	<b>\$84</b>	<b>\$27</b>	<b>\$75</b>	<b>\$48</b>	<b>\$36</b>	<b>\$18</b>		
<b>Performing Arts</b>								

## Maryland Arts and Entertainment Districts Economic Impact Analysis FY 2018

RESI of Towson University

Events/Festivals	Hotels	Transportation	Food and Beverage	Retail Sales	Entertainment	Other	Total Spending	Total Attendance
Sisters Folk Festival (2014)	\$211,000	\$118,000	\$351,000	\$121,000	\$414,000	N/A	\$1,215,000	3,676
Bogalusa Blues & Heritage Festival (2013)	\$40,600	\$81,300	\$189,750	\$34,400	N/A	\$169,600	\$515,650	5,000
Country Thunder music festival (2012)	\$1,029,718	\$1,824,674	\$2,289,572	\$571,649	N/A	N/A	\$5,715,613	30,879
Electric Daisy Festival Las Vegas (2011)	\$1,000,232	\$542,726	\$865,634	\$371,754	\$477,949	\$400,075	\$3,658,370	12,000
<b>AVERAGE PER CAPITA</b>	<b>\$46</b>	<b>\$38</b>	<b>\$70</b>	<b>\$22</b>	<b>\$76</b>	<b>\$34</b>		
<b>Other</b>								
Baltimore Book Festival (2015)	\$355,100	\$390,300	\$1,354,500	\$260,700	\$177,600	N/A	\$2,538,200	100,000
Four Corners Motorcycle Rally (2010)	\$509,220	\$485,100	\$996,480	\$559,980	\$350,460	N/A	\$2,901,240	18,000
Philadelphia International Flower Show (2010)	\$2,929,687	\$1,401,099	\$6,374,807	N/A	N/A	\$8,092,861	\$18,798,454	231,924
The Great New England Air Show (2009)	\$1,121,936	\$2,239,297	\$3,481,114	\$1,714,018	\$192,175	\$219,628	\$8,968,168	345,000
<b>AVERAGE PER CAPITA</b>	<b>\$12</b>	<b>\$11</b>	<b>\$27</b>	<b>\$13</b>	<b>\$7</b>	<b>\$18</b>		

Sources: Various<sup>29</sup>

<sup>29</sup> For a full list of the references used, please refer to Section 6.0.

RESI determined tax impacts based primarily on data from district responses provided in the annual reports.

**B.3 Modeling Assumptions**

RESI assigned IMPLAN industry sectors based on application materials and/or annual reports provided by MSAC.

- Economic impact multipliers are developed from IMPLAN input/output software.
- IMPLAN data are based on the North American Industrial Classification System (NAICS).
- IMPLAN employment multipliers are adjusted for inflation using the Bureau of Labor Statistics’ CPI-U.
- Impacts are based on 2016 IMPLAN data for the state of Maryland, the most recent data available.
- Impacts are represented in 2019 dollars.
- Employment impacts include both full- and part-time employees. IMPLAN does not differentiate between full- and part-time employments.

The specific IMPLAN industry sectors used for the A&E districts can be found in Figure 12.

RESI made assumptions regarding the applicable industry codes in cases where districts did not provide specific property use data. All A&E districts were analyzed using an IMPLAN model built from state-level data for Maryland. For the most accurate and in-depth analysis of separate A&E districts, county-level data would be required.

**Figure 12: IMPLAN Industry Sectors**

Input Category	IMPLAN Code	Description
<i>Commercial Employment</i>		
Retail	396	Retail - Motor vehicle and parts dealers
	397	Retail - Furniture and home furnishings stores
	398	Retail - Electronics and appliance stores
	399	Retail - Building material and garden equipment and supplies stores
	400	Retail - Food and beverage stores
	401	Retail - Health and personal care stores
	402	Retail - Gasoline stores
	403	Retail - Clothing and clothing accessories stores
	404	Retail - Sporting goods, hobby, musical instrument and book stores
	405	Retail - General merchandise stores
406	Retail - Miscellaneous store retailers	
Restaurants	501	Full-service restaurants
	502	Limited-service restaurants
	503	All other food and drinking places

## Maryland Arts and Entertainment Districts Economic Impact Analysis FY 2018

RESI of Towson University

Input Category	IMPLAN Code	Description
Businesses/ Organizations	423	Motion picture and video industries
	424	Sound recording industries
	433	Monetary authorities and depository credit intermediation
	438	Insurance agencies, brokerages, and related activities
	439	Funds, trusts, and other financial vehicles
	440	Real estate
	447	Legal services
	448	Accounting, tax preparation, bookkeeping, and payroll services
	450	Specialized design services
	454	Management consulting services
	456	Scientific research and development services
	457	Advertising, public relations, and related services
	458	Photographic services
	460	Marketing research and all other miscellaneous professional, scientific, and technical services
	464	Employment services
	466	Travel arrangement and reservation services
	474	Other educational services
	475	Offices of physicians
	476	Offices of dentists
	477	Offices of other health practitioners
	481	Other ambulatory health care services
	478	Outpatient care centers
	479	Medical and diagnostic laboratories
	483	Nursing and community care facilities
	484	Residential mental retardation, mental health, substance abuse and other facilities
	487	Child day care services
	488	Performing arts companies
	492	Independent artists, writers, and performers
	493	Museums, historical sites, zoos, and parks
	497	Fitness and recreational sports centers
496	Other amusement and recreation industries	
500	Other accommodations	
508	Personal and household goods repair and maintenance	
<i>Visitor Spending at Events/Festivals</i>		
Hotels	499	Hotels and motels, including casino hotels
Food	501	Full-service restaurants
	502	Limited-service restaurants

## Maryland Arts and Entertainment Districts Economic Impact Analysis FY 2018

RESI of Towson University

Input Category	IMPLAN Code	Description
	503	All other food and drinking places
Retail	400	Retail - Food and beverage stores
	401	Retail - Health and personal care stores
	402	Retail - Gasoline stores
	403	Retail - Clothing and clothing accessories stores
	404	Retail - Sporting goods, hobby, musical instrument and book stores
	405	Retail - General merchandise stores
Transportation	408	Air transportation
	409	Rail transportation
	412	Transit and ground passenger transportation
	414	Scenic and sightseeing transportation and support activities for transportation
Entertainment	488	Performing arts companies
	489	Commercial Sports Except Racing
	490	Racing and Track Operation
	491	Promoters of performing arts and sports and agents for public figures
	492	Independent artists, writers, and performers
	493	Museums, historical sites, zoos, and parks
	497	Fitness and recreational sports centers
	498	Bowling centers
496	Other amusement and recreation industries	
Other	504	Automotive repair and maintenance, except car washes
	505	Car washes
	508	Personal and household goods repair and maintenance
	509	Personal care services
	511	Dry-cleaning and laundry services
	512	Other personal services

Source: IMPLAN

### B.4 Exclusions

The project team estimated economic impacts primarily using new commercial employment and all visitor spending at events and festivals. Existing businesses were not included in the analysis due to the difficulty in determining if these businesses had been formed as a direct result of the A&E district designation or if these businesses had been formed as a result of some other factor(s). If the analysis included the impacts of businesses falling under the latter case, the findings would likely be overstated.

Other A&E district operations that would contribute to positive economic activity were excluded in the analysis. Such factors include the new art sales for artists and galleries, ticket/entry expenditures for arts enterprises, rental income from artists' space, and awarded grants.

#### **B.5 Limitations of Provided Data**

A&E districts are expected to complete annual reports to provide information regarding goals, accomplishments, new establishments, events/festivals and promotions, attendance figures, and awards and grants for the tax year. These reports were provided by MSAC and cover FY 2018. All A&E districts submitted reports for this period.

While each A&E district received identically formatted questions, not all reports were completed in the same way. For instance, all of the A&E districts did not provide a response for every question. In most cases, RESI could use data estimates for analysis purposes.

## Appendix C—Glossary

A glossary of economic and tax impact terminology frequently used throughout this report can be found in Figure 13.

**Figure 13: Glossary of Terms**

Term	Definition
Economic Impact	This term refers to the changes in the economy resulting from an event and activities that support the event.
Employment	This term refers to the number of jobs created or supported as a result of 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.
Employee Compensation Impact	This term refers to the change in employee compensation (including all salaries and wages, benefits, etc.) associated with the job and output creation resulting from district activity which has been modeled in IMPLAN.

Source: RESI

Appendix D—MSAC A&E District Annual Report

# MARYLAND STATE ARTS COUNCIL

**FY 2018  
ARTS & ENTERTAINMENT DISTRICTS  
ANNUAL REPORT  
DEADLINE: October 15, 2018**



CELEBRATING  
**50 YEARS** OF SERVICE  
TO THE ARTS

Maryland State Arts Council Part of the Maryland Department of Commerce



Individuals who do not use conventional print may contact the Maryland State Arts Council to obtain this publication in an alternate format. 410-767-6555 or [msac.commerce@maryland.gov](mailto:msac.commerce@maryland.gov)



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This publication is available as a PDF file on the MSAC website: [www.msac.org](http://www.msac.org).

**TABLE OF CONTENTS**

Maryland State Arts Council Information ..... 3  
Annual Report Procedure ..... 4  
A&E Districts Annual Report ..... 5

## MARYLAND STATE ARTS COUNCIL

### MSAC

175 Ostend Street, Suite E  
Baltimore, MD 21230

410-767-6555 | [msac.commerce@maryland.gov](mailto:msac.commerce@maryland.gov) | TTY: 1-800-552-7724 or 711

Office Hours: Monday - Friday 8:30 AM - 5:00 PM

**MSAC is an agency of the Maryland Department of Commerce, Division of Tourism, Film, and the Arts**

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## ANNUAL REPORT PROCEDURE

Per enabling legislation, all Maryland Arts and Entertainment Districts are required to submit reports to MSAC on an annual basis. Failure by a district to submit an annual report by the stated deadline may risk state A&E District designation and the continuation of the benefits associated with it.

All applications must be completed in **eGrant** and submitted successfully no later than 5:00 PM on the stated deadline.

- **To successfully submit, you must click on the Submit My Application button and eGrant must accept your application.** You will receive an onscreen confirmation message when you submit, and an email from eGrant with a copy of your application within an hour. Please check your spam/junk folder if the confirmation email does not appear in your mailbox.
- Technical support for eGrant is available during regular office hours, 8:00 AM through 5:00 PM, Monday through Friday. **Technical support will not be available after 5:00 PM on the stated deadline.**

MSAC STAFF USE ONLY
AED 2018/_____

**ARTS & ENTERTAINMENT DISTRICTS ANNUAL REPORT FY 2017**  
**DEADLINE: OCTOBER 15, 2018, 5:00 PM**

**THIS ANNUAL REPORT MUST BE COMPLETED IN EGRANT**  
**PLEASE REFER TO THE "FINAL REPORT PROCEDURE" SECTION ON PAGE 4**  
**FOLLOW INSTRUCTIONS BELOW WHEN FORMATTING RESPONSES**

**ANSWER ALL QUESTIONS AS THEY PERTAIN TO THE REPORTING PERIOD:**  
**JULY 1, 2017 - JUNE 30, 2018**

**GENERAL INFORMATION**

District Name:	
County:	Year Authorized:
Re-Designation Date (if completed):	Expansion Date (if granted):
Re-Designation Due:	Total Acreage:
Managing Entity:	
Tax Exempt Number:	
Website:	
<b>A&amp;E DISTRICT PRIMARY CONTACT PERSON</b>	<b>BOARD CHAIR/MANAGEMENT TEAM CHAIR</b>
Name:	Name:
Title:	Title:
Address:	Address:
City:	City:
State: MD	State: MD
Zip Code:	Zip Code:
Phone:	Phone:
Mobile:	Mobile:
Email:	Email:
Fax:	Fax:

**Stakeholders:** List your district’s stakeholders and partners, including a contact name and email address for each entity.

Stakeholders may include your district’s County Arts Council, Local Tourism Office, Community Development Corporation, Downtown Partnership, Chamber of Commerce, Major Arts Venues, Arts Organizations you collaborate with, etc.

*Provide your response in a list in the following format:*  
*Stakeholder/Partner; Contact Name; E-Mail Address*

*Stakeholder/Partner; Contact Name; E-Mail Address  
(etc...)*

**ANSWER ALL QUESTIONS AS THEY PERTAIN TO THE REPORTING PERIOD:  
FY 2018 (JULY 1, 2017 - JUNE 30, 2018)**

## SECTION I: DISTRICT OVERVIEW

- A. Provide a narrative overview of your district's accomplishments during the reporting period.

*(Maximum 8000 characters, including spaces. Suggested minimum length 3000 characters.)*

Overall, this response should illustrate district accomplishments within the reporting period. Refer to the list below and include brief descriptions for any items that pertain to your district.

- new initiatives (*e.g. strategic planning, marketing campaigns, funding secured, management changes, partnerships/collaborations, signage, etc.*)
- significant events and festivals occurring within the district
- new public art projects within the district
- new capital projects within the district
- new or significant retailers, businesses, and restaurants within the district
- activities of significant arts organizations or arts-related businesses
- changes in district management and staffing

In addition, please reference the district's goals listed in Section VIII of your previous year's annual report, reporting on district progress toward the stated goals and any new plans or goals developed or implemented since the last report.

- B. Provide a narrative overview of challenges that the district faced during the reporting period.

*(Maximum 8000 characters, including spaces. Suggested minimum length 2000 characters.)*

*MSAC uses responses to Section I, questions A and B to inform program development, report to State officials, and provide technical assistance to districts. The A&E Districts Program Advisory Committee also reviews these and other parts of this report to select Outstanding Achievement awardees.*

- C. How many capital projects were initiated, in process, or completed in the district during the reporting period? If none, enter 0.

Provide a list of all capital projects initiated, in process, or completed within the district during the reporting period. Include A&E District projects as well as those undertaken in the district by other organizations, developers, or enterprises.

*Include the name or address, CP type (see below), and phase at the end of the reporting period (see below) of each project in the following format:*

*Project Name/Address; CP type; Number of Units; Phase  
Project Name/Address; CP type; Number of Units; Phase  
Etc...*

*CP Type: Residential, Commercial, Mixed-Use, Industrial, Artist Housing; Other (include as many as pertain)*

*Phase: Initiated, In Process, Completed*

- D. How many new retailers opened in the district during the reporting period? If none, enter 0.

Provide a list of all retailers that opened in the district during the reporting period. For the purposes of this report, retailers include businesses that sell goods, whether arts-related or not.

*Include each retailer's name, industry (see below), and if available the number of full and part-time jobs employed by the retailer in the following format:*

*Retailer Name; Retailer Industry; #FT; #PT  
Retailer Name; Retailer Industry; #FT; #PT  
Etc...*

*Retailer Industry: General, Specialty (e.g. art supplies, sporting goods, books, music), Clothing, Food/Beverage, Health (e.g. drug stores), Other.*

- E. How many new businesses opened in the district during the reporting period? If none, enter 0.

Provide a list of all businesses (other than retailers and restaurants) that opened in the district during the reporting period.

*Include each business' name, industry (see below), and if available the number of full and part-time jobs employed by the business in the following format:*

*Business Name; Business Industry; #FT; #PT  
Business Name; Business Industry; #FT; #PT  
Etc...*

*Business Industry: Accommodations (e.g. hotels, b&bs, etc.), Arts-Related, Attraction (specify Museum, Historical Site, Amusement, etc.), Education, Financial, Fitness, Medical, Real Estate, Other.*

- F. How many new restaurants opened in the district during the reporting period? If none, enter 0.

Provide a list of all restaurants that opened in the district during the reporting period.

*Include each restaurant's name, whether it provides full, counter, or bar service, and if available the number of full and part-time jobs employed by the restaurant in the following format:*

*Restaurant Name; Full/Counter/Bar; #FT; #PT*

*Restaurant Name; Full/Counter/Bar; #FT; #PT*

*Etc...*

- G. How many organizations newly located in the district during the reporting period? If none, enter 0.

Provide a list of all organizations that opened a physical office or space in the district during the reporting period. Organizations may include not-for-profit arts or service organizations and any other organizations not included in any of the categories above.

*Include each organization's name, type (see below) and if available the number of full and part-time jobs employed by the organization in the following format:*

*Organization Name; Org Type; #FT; #PT*

*Organization Name; Org Type; #FT; #PT*

*Etc...*

*Org type: Arts-Related, Not-For-Profit, Community, Other (include all types that pertain)*

## **SECTION II: CLOSINGS**

- A. How many retailers closed in the district during the reporting period? If none, enter 0.

Provide a list of all retailers that closed in the district during the reporting period. For the purposes of this report, retailers include businesses that sell goods, whether arts-related or not.

*Include each retailer's name, industry (see below) and if available the number of full and part-time jobs lost because of the retailer's closing in the following format:*

*Retailer Name; Retailer Industry; #FT; #PT*

*Retailer Name; Retailer Industry; #FT; #PT*

*Etc...*

*Retailer Industry: General, Specialty (e.g. art supplies, sporting goods, books, music), Clothing, Food/Beverage, Health (e.g. drug stores), Other.*

- B. How many businesses closed in the district during the reporting period? If none, enter 0.

Provide a list of all businesses (other than retailers and restaurants) that closed in the district during the reporting period.

*Include each business' name, industry (see below), and if available the number of full and part-time jobs lost because of the business' closing in the following format:*

*Business Name; Business Industry; #FT; #PT*

*Business Name; Business Industry; #FT; #PT*

*Etc...*

*Business Industry: Accommodations (e.g. hotels, b&bs, etc.), Arts-Related, Attraction (specify Museum, Historical Site, Amusement, etc.), Education, Financial, Fitness, Medical, Real Estate, Other.*

- C. How many restaurants closed in the district during the reporting period? If none, enter 0.

Provide a list of all restaurants that closed in the district during the reporting period.

*Include each restaurant's name, whether it provided full, counter, or bar service, and if available the number of full and part-time jobs lost because of the restaurant's closing in the following format:*

*Restaurant Name; Full/Counter/Bar; #FT; #PT  
Restaurant Name; Full/Counter/Bar; #FT; #PT  
Etc...*

- D. How many organizations closed or moved outside the district during the reporting period? If none, enter 0.

Provide a list of all organizations that closed a physical office or space in the district during the reporting period. Organizations may include not-for-profit arts or service organizations and any other organizations not included in any of the categories above.

*Include each organization's name, type (see below) and if available the number of full and part-time jobs lost because of the organization's closing in the following format:*

*Organization Name; Org Type; #FT; #PT  
Organization Name; Org Type; #FT; #PT  
Etc...*

*Org type: Arts-Related, Not-For-Profit, Community, Other (include all that pertain)*

**SECTION III: DISTRICT EVENTS AND FESTIVALS**

**A. How many events occurred within the district during the reporting period?**

Provide a list of all public events that occurred within the district during the reporting period. Include events presented by district management as well those presented by other organizations or enterprises.

*Include the event's name, date(s), number of occurrences during the reporting period, estimated total attendance (total for all occurrences during the reporting period), and event type (see below). Mark with an asterisk (\*) events that took place for the first time during the reporting period. Please use the following formats:*

*For new events:*

*\*Event Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type  
\*Event Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type  
Etc...*

*For reoccurring/annual events:*

*Event Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type  
Event Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type  
Etc...*

*Event Type: Community, Culture, Film, Fine Art, Food, Holiday, Performing Arts, Other*

**B. How many festivals occurred within the district during the reporting period?**

Provide a list of all public festivals that occurred within the district during the reporting period. Include festivals presented by district management as well those presented by other organizations or enterprises.

*Include the festival's name, date(s), number of occurrences during the reporting period, estimated total attendance (total for all occurrences during the reporting period), and festival type (see below). Mark with an asterisk (\*) festivals that were presented for the first time during the reporting period. Please use the following formats:*

*For new festivals:*

*\*Festival Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type  
\*Festival Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type  
Etc...*

*For reoccurring/annual festivals:*

*Festival Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type  
Festival Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type  
Etc...*

*Festival Type: Community, Culture, Film, Fine Art, Food, Holiday, Performing Arts, Other*

**SECTION IV: DISTRICT ASSETS**

**A. DISTRICT ARTS AND ENTERTAINMENT ENTERPRISES**

Provide a list of all arts-related enterprises within the district by type.

*Enter each enterprise once under the appropriate enterprise type. Omit any types that do not apply. Enter an enterprise under "Other" if it does not fit any of the first seven types.*

*Enterprise Types: Galleries/Co-ops; Performance Venues; Museums; Arts Organizations; Arts Education Organizations; Public Art Pieces; Art Suppliers/Services; Other*

*For each type, include the name and annual attendance/patronage/visitation of each enterprise in the following format:*

*Galleries/Co-ops*

*Name; Estimated Total Annual Attendance/Patronage/Visitation*

*Name; Estimated Total Annual Attendance/Patronage/Visitation*

*Etc...*

*Performance Venues*

*Name; Estimated Total Annual Attendance/Patronage/Visitation*

*Name; Estimated Total Annual Attendance/Patronage/Visitation*

*Etc...*

*ETC...*

Note: For those organizations that perform, exhibit, or provide services outside of the district, only include attendance that occurs within the district in your estimate.

**B. ARTIST HOUSING**

Provide a list of housing in the district that is built for or marketed to artists. Include affordable housing and any explanatory information as necessary.

*Include name or address, type (see below) and number of units in the following format:*

*Name/Address; Housing Type; Number of Units*

*Name/Address; Housing Type; Number of Units*

*Etc.*

*Housing Type: Artist; Affordable; Market-rate; Apartment; Condominium; Other (include all that pertain)*

**C. OCCUPANCY RATE**

Estimate the percentage of occupied real estate at the end of the current reporting period for each type of building stock in the district:

Storefront/Commercial	_____	%	<input type="checkbox"/> N/A
Residential	_____	%	<input type="checkbox"/> N/A
Industrial/Manufacturing	_____	%	<input type="checkbox"/> N/A
Mixed Use*	_____	%	<input type="checkbox"/> N/A

*\*Mixed Use is defined as a combination of land uses on the same site. Occupancy for this report can be estimated based on information from local real estate or licensing offices or best estimates based on district manager knowledge of the district.*

**SECTION V: DISTRICT BENEFIT INFORMATION**

- A.** Does the district maintain an artist registry? Yes/No

What is the total number of registered artists working in the district?  
How many artists registered during the reporting period?

- B.** Estimate the total number of artists working in the district.

*This estimate should include all registered artists (if the district maintains a registry) and an estimate of all artists regularly working within the district during the reporting period.*

- C.** Does the district have an artist relocation program? Yes/No

How many artists relocated to the district during the reporting period as a result of the program?

- D.** How many businesses in the district take advantage of the Admission and Amusement Tax abatement? If none, enter 0.

Provide a list all businesses taking advantage of the abatement.

- E.** How many property tax credits were applied for during the reporting period?

Provide a list of property addresses for which property tax credits applications were submitted.

*To confirm whether or not a construction project applied for A&E property tax credits, contact the tax office for your county, city, or town. County contact information can be found at <http://dat.maryland.gov/realproperty/Pages/Local-Tax-Billing-Collection-Offices.aspx>. Contact the Program Director for help finding this information.*

- F.** Other than the A&E tax incentives, list all additional incentives available in the district.

*List all incentives available within the district that are offered by state, county, or local government, by business groups, or through designations that overlap the A&E District.*

- G.** Communication tools: check all that apply.

- |                                     |  |
|-------------------------------------|--|
| <input type="checkbox"/> Facebook   | <input type="checkbox"/> On-line events calendar |
| <input type="checkbox"/> Twitter    | <input type="checkbox"/> Artist registry         |
| <input type="checkbox"/> Website    | <input type="checkbox"/> Other – specify:        |
| <input type="checkbox"/> Media page |  |

**SECTION VI: DISTRICT FUNDING**

**REPORT FUNDING APPLIED FOR OR RECEIVED FOR DISTRICT PROJECTS OR OPERATIONS ONLY**

Enter 0 in Award/Grant Amount if an application was submitted but funding was not awarded.

- A.** Indicate any federal or national funding applications submitted and provide grant/award amounts received for district projects or operations during the reporting period.

ENTITY	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
National Endowment for the Arts	<input type="checkbox"/> Yes	\$ _____
National Trust for Historic Preservation	<input type="checkbox"/> Yes	\$ _____
ArtPlace America	<input type="checkbox"/> Yes	\$ _____
Other – Specify:	<input type="checkbox"/> Yes	\$ _____

- B.** Indicate all Maryland State Arts Council applications submitted and provide grant amounts received for projects undertaken by the district during the reporting period.

MSAC PROGRAM	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
Technical Assistance	<input type="checkbox"/> Yes	\$ _____
Grants for Organizations	<input type="checkbox"/> Yes	\$ _____
Public Art	<input type="checkbox"/> Yes	\$ _____
Maryland Touring	<input type="checkbox"/> Yes	\$ _____
Other – Specify:	<input type="checkbox"/> Yes	\$ _____

- C.** Indicate any other state funding applied for or awarded for district projects or operations during the reporting period.

ENTITY	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
Maryland Main Street	<input type="checkbox"/> Yes	\$ _____
Heritage Areas Authority/Planning	<input type="checkbox"/> Yes	\$ _____
Department of Transportation	<input type="checkbox"/> Yes	\$ _____
Department of Planning	<input type="checkbox"/> Yes	\$ _____
Capital Bond	<input type="checkbox"/> Yes	\$ _____
Other – Specify:	<input type="checkbox"/> Yes	\$ _____

- D.** Indicate any local awards/grants applied for or awarded for district projects or operations during the reporting period.

ENTITY	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
_____	<input type="checkbox"/> Yes	\$ _____
_____	<input type="checkbox"/> Yes	\$ _____
_____	<input type="checkbox"/> Yes	\$ _____

- E. If your district receives direct operating support, indicate who provides the operating support and how much was provided during the reporting period.

Please enter only direct operating support provided to the district. All grants applied for and received, even if reoccurring, should be entered in A-D above.

*Include the name of each entity giving support, the total dollar amount of the support given by the entity during the reporting period, and the purpose of the support in the following format:*

*Entity; \$Amount; Purpose  
Entity; \$Amount; Purpose  
Etc...*

- F. If your district receives in-kind support, (e.g. office space, administrative support) indicate who provides the in-kind support, the type of support, and the estimated value.

*Include the name of each entity giving in-kind support, the type of support (time, space, materials, discounted services, etc.), and the estimated total dollar amount of the support given by the entity during the reporting period in the following format:*

*Entity; Type; Estimated \$Amount  
Entity; Type; Estimated \$Amount  
Etc...*

**SECTION VII: GOALS FOR CURRENT FISCAL YEAR**

- A. Briefly outline your district’s goals for the current fiscal year and your plans for achieving those goals. Include mention of any anticipated changes in district management or funding, new initiatives or strategies, new events or festivals, and any major capital or public art projects planned.

*(Maximum 8000 characters, including spaces. Suggested minimum length 2000 characters.)*

**SECTION VIII: MSAC TECHNICAL ASSISTANCE**

- A. Let us know what type of technical assistance MSAC could provide beyond funding that would serve to strengthen your district and help you achieve the goals listed above.

Please include topics you feel would be most relevant for annual professional development days and any other resources or ideas that would serve your district.

**SECTION IX. CERTIFICATION**

- The A&E District Representative agrees to complete and submit this application by electronic means, including the use of an electronic signature.

Name \_\_\_\_\_  
Title \_\_\_\_\_  
Date \_\_\_\_\_

- Checking this box verifies that the name typed above is authorized to sign this Maryland State Arts Council A&E Districts Annual Report on behalf of the A&E District and certifies that all information contained in this report is true and accurate to the best of the signatory’s knowledge. Checking this box verifies that the applicant agrees to complete and submit this report by electronic means, including the use of an electronic signature.

## Appendix E—A&E District Websites

For reference purposes, the counties and websites for each A&E district (where available) can be found in Figure 14.

**Figure 14: A&E District Websites**

District	County	Website
Annapolis	Anne Arundel	<a href="http://www.annapolisarts.org/">http://www.annapolisarts.org /</a>
Bel Air	Harford	<a href="http://www.belairartsandentertainment.org/">http://www.belairartsandentertainment.org/</a>
Berlin	Worcester	<a href="http://www.berlinmainstreet.com/">http://www.berlinmainstreet.com/</a> <a href="https://www.artsinberlin.org/">https://www.artsinberlin.org/</a>
Bethesda	Montgomery	<a href="http://www.bethesda.org/bethesda/arts-entertainment">http://www.bethesda.org/bethesda/arts-entertainment</a>
Bromo Tower	Baltimore City	<a href="https://www.bromodistrict.org/">https://www.bromodistrict.org/</a>
Cambridge	Dorchester	<a href="https://www.choosecambridge.com/">https://www.choosecambridge.com/</a>
Chestertown	Kent	<a href="http://townofchestertown.com/ae-district/">http://townofchestertown.com/ae-district/</a>
Cumberland	Allegany	<a href="http://www.alleganyartscouncil.org/resource.php?id=4">http://www.alleganyartscouncil.org/resource.php?id=4</a>
Denton	Caroline	<a href="https://carolinearts.org/denton-artsway/">https://carolinearts.org/denton-artsway/</a>
Elkton	Cecil	<a href="http://www.elktonalliance.org/arts-entertainment-district">http://www.elktonalliance.org/arts-entertainment-district</a>
Frederick	Frederick	<a href="http://www.frederickartscouncil.org">www.frederickartscouncil.org</a>
Frostburg	Allegany	<a href="http://www.downtownfrostburg.com/the-arts/">http://www.downtownfrostburg.com/the-arts/</a>
Gateway	Prince George's	<a href="http://mygatewayarts.org/">http://mygatewayarts.org/</a>
Grantsville	Garrett	<a href="http://www.visitgrantsville.com/about/arts-entertainment-district/">http://www.visitgrantsville.com/about/arts-entertainment-district/</a>
Hagerstown	Washington	<a href="http://hagerstownmd.org/157/Arts-Entertainment-District">http://hagerstownmd.org/157/Arts-Entertainment-District</a>
Havre de Grace	Harford	<a href="http://hdgartscollective.org/arts-entertainment-district/">http://hdgartscollective.org/arts-entertainment-district/</a>
Highlandtown	Baltimore City	<a href="http://www.highlandtownarts.com/">http://www.highlandtownarts.com/</a>
Leonardtwn	St. Mary's	<a href="http://www.leonardtwn.somd.com">www.leonardtwn.somd.com</a>
Oakland	Garrett	<a href="http://www.oaklandaedistrict.com">www.oaklandaedistrict.com</a>
Salisbury	Wicomico	<a href="https://www.salisburyartsdistrict.com/">https://www.salisburyartsdistrict.com/</a>
Silver Spring	Montgomery	<a href="http://silverspringdowntown.com/">http://silverspringdowntown.com/</a>
Snow Hill	Worcester	<a href="http://www.snowhillmd.com/">http://www.snowhillmd.com/</a>
Station North	Baltimore City	<a href="http://www.stationnorth.org/">http://www.stationnorth.org/</a>
Stevensville	Queen Anne's	<a href="http://stevensvilleartsandentertainment.org/">http://stevensvilleartsandentertainment.org/</a>
Wheaton	Montgomery	<a href="https://www.wheatonmd.org/aande-district">https://www.wheatonmd.org/aande-district</a>

Source: MSAC

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