

FY 2019 Maryland Arts and Entertainment District Economic and Tax Impact Analysis

Prepared for
The Maryland State Arts Council

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1.0 Executive Summary

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

MSAC manages a variety of programs statewide that supports the arts at the individual, organization, and community levels.³ One of these programs is the Arts & Entertainment Districts (A&E Districts) program, designed “to 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.”⁴

Each year, MSAC distributes an annual report for each district to complete, highlighting the activities undertaken within these districts for the past fiscal year (FY). MSAC then provided these annual reports to Towson University’s Regional Economic Studies Institute (RESI), who tabulated the FY 2019 annual report data into a survey report. This report highlighted the variety of activity occurring within the state’s A&E Districts. RESI then utilized some of these data to conduct an economic and tax revenue impact and footprint analysis, examining business growth within district borders as well as visitor totals to events and festivals.

1.1 Economic Footprint

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

In FY 2019, the 26 A&E Districts had a total economic footprint of:

- 1,620 jobs, comprised of 940 jobs supported by attendee spending and 680 supported by net business growth;
- Over \$157.6 million in state GDP, with \$86.2 million from attendee spending and \$71.4 million supported by net business growth; and
- \$50.8 million in employee compensation, comprised of \$28.1 million from attendee spending and \$22.8 million from net business growth.

¹ “About Us—Mission and Goals,” Maryland State Arts Council, accessed May 28, 2020, <https://www.msac.org/about-us>.

² “About Us—Authority,” Maryland State Arts Council, accessed May 28, 2020, <https://www.msac.org/about-us>.

³ “Programs,” Maryland State Arts Council, accessed May 28, 2020, <https://www.msac.org/programs>.

⁴ “Arts & Entertainment Districts,” Maryland State Arts Council, accessed April 29, 2020, <https://www.msac.org/programs/arts-entertainment-districts>.

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

Figure 1: Economic Footprint of Maryland's A&E Districts, FY 2019

Activity Type	Direct	Indirect	Induced	Total
<i>Overall Attendee Footprint</i>				
Employment	732	93	115	940
State GDP	\$49,291,594	\$17,967,073	\$18,946,445	\$86,205,111
Employee Compensation	\$17,627,020	\$5,125,383	\$5,326,126	\$28,078,530
<i>Net Business Growth</i>				
Employment	529	59	93	680
State GDP	\$49,942,629	\$6,272,841	\$15,193,439	\$71,408,910
Employee Compensation	\$16,181,086	\$2,312,849	\$4,263,352	\$22,757,286
Total				
Employment	1,261	151	208	1,620
State GDP	\$99,234,223	\$24,239,914	\$34,139,885	\$157,614,022
Employee Compensation	\$33,808,106	\$7,438,231	\$9,589,477	\$50,835,816

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

1.2 Tax Footprint

The economic footprints presented above produce nearly \$12.4 million in taxes for state and local governments. As seen in Figure 2, sales and property taxes form the majority of these revenues.

Figure 2: Total State and Local Tax Footprints of Maryland's A&E Districts, FY 2019

Activity Type	Property	Income	Sales	Payroll	Other	Total
Out-of-State Visitor Impact	\$588,135	\$24,047	\$584,079	\$11,552	\$363,236	\$1,571,048
In-State Attendee Footprint	\$1,823,642	\$74,563	\$1,811,065	\$35,821	\$1,126,293	\$4,871,384
Business Net Growth Impact	\$2,225,270	\$784,944	\$2,246,604	\$38,699	\$652,696	\$5,948,213
Total	\$4,637,046	\$883,554	\$4,641,748	\$86,072	\$2,142,224	\$12,390,645

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

Maryland’s 26 A&E Districts contribute to the cultural fabric of the state as well as the economy. This economic activity is shared throughout the state, ranging from dense, urban districts in Baltimore City and the suburbs of Washington, D.C., to sprawling districts that cover entire downtown areas on the Eastern Shore. As the A&E District program continues to grow, and local residents continue to establish districts in their communities, the arts and creative energy in the state will continue to flourish—and benefit the economy.

2.0 Introduction

The Maryland State Arts Council (MSAC) is a State agency whose mission is “to advance the arts in our state by providing leadership that champions creative expression, diverse programming, equitable access, lifelong learning, and the arts as a celebrated contributor to the quality of life for all the people of Maryland.”⁵ To achieve this mission, MSAC works to increase participation in the arts for all Maryland residents by specific resources to support this, ensure that Maryland has a functioning and thriving arts ecosystem to support creativity in the state, help arts communities connect within the state, and showcase Maryland artists and the arts in Maryland.⁶ MSAC operates under the authority of the Maryland Department of Commerce, underscoring the State’s endorsement that the arts are an integral component of both the state’s creative and economic ecosystems.⁷

MSAC manages a variety of programs statewide that supports the arts at the individual, organization, and community levels.⁸ One of these programs is the Arts & Entertainment Districts (A&E Districts) program, designed “to 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.”⁹ Each A&E District has unique economic development goals and priorities, which can include producing or facilitating events, attracting new businesses or developers, encouraging artists to locate and/or sell artworks in the district’s boundaries, or a combination of strategies.

Each year, MSAC distributes an annual report for each district to complete, highlighting the activities undertaken within these districts for the past fiscal year (FY). MSAC tasked Towson University’s Regional Economic Studies Institute (RESI) with analyzing the data collected from the annual report. To achieve the project objective, RESI collated and analyzed the survey results in a comprehensive report of all 26 districts for FY 2019.

Once this preliminary analysis was completed, RESI utilized the results to conduct an economic and tax analysis of the state’s A&E Districts. To quantify the role of A&E Districts within Maryland’s economy, RESI considered the role of net new business growth within district borders in FY 2019 (July 2018-June 2019) as well as spending associated with attendees at events and festivals within district boundaries in FY 2019. This analysis continues the 10-year relationship between MSAC and RESI but updates the economic and tax analysis to reflect changes in the underlying model data as well as refinements to the modeling process; these

⁵ “About Us—Mission and Goals,” Maryland State Arts Council, accessed May 28, 2020, <https://www.msac.org/about-us>.

⁶ Ibid.

⁷ “About Us—Authority,” Maryland State Arts Council, accessed May 28, 2020, <https://www.msac.org/about-us>.

⁸ “Programs,” Maryland State Arts Council, accessed May 28, 2020, <https://www.msac.org/programs>.

⁹ “Arts & Entertainment Districts,” Maryland State Arts Council, accessed April 29, 2020, <https://www.msac.org/programs/arts-entertainment-districts>.

changes will be discussed in Section 3.0. Thus, the results presented in this report cannot be directly compared to previous economic and tax analyses of A&E Districts.

The report continues as follows:

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

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

3.0 Technical Approach

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

3.1 Model Background

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

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

Direct, indirect, and induced effects can be presented in a variety of ways—for example effects in terms of employee counts, economic output or state GDP, or employee compensation. Since these metrics represent different ways of measuring the same effect, they are not additive.

For the FY 2019 economic and tax analysis of Maryland's A&E Districts, RESI used the IMPLAN model for the state of Maryland for 2018, the most recent data year available. The 2018 model

year is based on a 546-sector scheme for the state’s economy; prior analyses had been conducted using the most recent models available at the time, which were based on 536-sector model schemes or 440-sector model schemes.

Due to this variation as well as significant changes to the underlying data in the model, the results of the IMPLAN analysis in this report cannot be directly compared to prior reports.¹⁰ Furthermore, IMPLAN notes that some economic effects may appear smaller in this up-to-date version of the model due to methodological and underlying data changes, even if the economy is not shrinking.¹¹

3.2 Modeling Approach

To capture the economic activity associated with Maryland’s A&E districts, RESI considered two different activities: spending associated with attendees at events in festivals within A&E Districts during FY 2019, and activity associated with net new businesses that opened within A&E Districts in FY 2019. Please note that some of these processes have been updated from prior analyses to re-benchmark spending patterns. Thus, these results cannot be directly compared with prior reports.

3.2.1 Modeling Attendee Spending

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

To calculate the traditional economic impacts and the economic footprint of events and festivals in Maryland’s A&E Districts in FY 2019 RESI utilized information provided in the annual reports. Generally, A&E Districts provided a list of events and festivals as well as approximate attendance; in cases where attendance figures were unavailable, RESI estimated attendance based on prior years’ data. Please note that this may result in under-counting or over-counting of attendee counts in some districts.

RESI used these attendance figures and research published by Americans for the Arts to estimate attendee spending at A&E District events and festivals. These calculations take into

¹⁰ “BEA Benchmark and the New 546 Industry Scheme—Comparing Data Across Time,” IMPLAN, accessed May 29, 2020, <https://implanhelp.zendesk.com/hc/en-us/articles/360034895094-BEA-Benchmark-The-New-546-Industry-Scheme>.

¹¹ Ibid.

consideration both the proportion of attendees that are Maryland residents versus out-of-state visitors as well as the different spending patterns for these two groups.¹²

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

3.2.2 Modeling Net New Business Activity

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

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

4.0 The Arts and their Role in the Economy

According to the most current edition of Americans for the Arts report, *Arts & Economic Prosperity V*, the nonprofit arts and culture industry in the U.S. generated \$166.3 billion in total direct expenditures and \$96.1 billion in resident household incomes in 2015. This activity supported 4.6 million full-time equivalent jobs. Jobs within the arts and culture industry account for 0.8 percent of the U.S. workforce, which exceeds the proportion of the workforce who are Police Officers, who account for 0.5 percent, and Computer Programmers, who account for 0.2 percent.¹³ Taxes associated with the industry and paid to local, state, and federal governments amounted to \$27.5 billion.¹⁴

¹² Americans for the Arts, "The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland," 2017, accessed March 25, 2020, https://www.americansforthearts.org/sites/default/files/pdf/2017/by_program/reports_and_data/aep5/map/MD_StateOfMaryland_AEP5_OnePageSummary.pdf

¹³ Americans for the Arts, "Arts & Economic Prosperity V," 7.

¹⁴ Americans for the Arts, "Arts & Economic Prosperity V: The Economic Impact of Nonprofit Arts & Cultural Organizations and Their Audiences," 4, accessed May 21, 2020, https://www.americansforthearts.org/sites/default/files/aep5/PDF_Files/NationalFindings_StatisticalReport.pdf.

The arts and culture industry is also important to the Mid-Atlantic region. *Arts & Economic Prosperity V* provides key economic statistics at the state level, summarized in Figure 3. These metrics provide useful context to Maryland’s comparative standing as well as the role of the industry in the region. As shown in Figure 3, Pennsylvania tops the charts in each of the four categories, which is not surprising since it is the largest of these jurisdictions. Please note that totals may not sum due to rounding.

Figure 3: Statewide Economic Metrics for the Nonprofit Arts and Culture Industry, 2015

State	Direct Expenditures	Resident Household Income (in Thousands)	State and Local Tax Revenue (in Thousands)	Total Population
Pennsylvania	\$3,388,145,326	\$2,205,857	\$402,116	12,802,503
District of Columbia	\$2,906,271,526	\$1,234,017	\$193,041	672,228
<i>Maryland</i>	<i>\$961,572,264</i>	<i>\$643,499</i>	<i>\$87,366</i>	<i>6,006,401</i>
New Jersey	\$519,814,484	\$340,048	\$40,964	8,958,013
Delaware	\$149,903,883	\$111,640	\$10,452	945,934

Source: Americans for the Arts

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

As of 2017, the most recent data available from the ACPSA, the industry’s economic activity accounted for 4.5 percent of GDP, or \$877.8 billion, nationwide. In the same report, employment data shows that the industry provided 5.1 million jobs nationwide and the percent change in these jobs increased in 29 states from the year prior.¹⁵ The ACPSA also produces state-level data; information on the Mid-Atlantic Region is presented below. Of note, while the estimated values may vary between the two sources, both show similar trends.

¹⁵ Bureau of Economic Analysis, “Arts and Cultural Production Satellite Account, U.S. and States 2017,” accessed May 26, 2020, <https://www.bea.gov/news/2020/arts-and-cultural-production-satellite-account-us-and-states-2017>.

Figure 4: Statewide Economic Comparison of Arts and Cultural Production Industries across Mid-Atlantic States, 2017

State	Employment	Employment Location Quotient	Compensation (in Thousands)	Compensation Location Quotient
Pennsylvania	176,787	0.86	\$11,665,544	0.74
New Jersey	137,518	0.98	\$11,424,920	0.91
<i>Maryland</i>	<i>80,989</i>	<i>0.85</i>	<i>\$6,055,484</i>	<i>0.73</i>
District of Columbia	55,462	2.08	\$7,405,422	2.07
Delaware	8,824	0.56	\$493,743	0.40
United States	5,107,891	1.00	\$404,853,670	1.00

Source: BEA ACPSA

Figure 4 also includes sections on employment and compensation location quotients. The ACPSA defines location quotients (LQs) as a measurement of “an industry’s regional concentration of value added, employment, or compensation relative to the U.S. industry’s share.”¹⁶ LQs are based on a number system where a score of one is equal to the national industry. For example, In Figure 3 above, Maryland has an employment LQ of 0.85 and a compensation LQ of 0.73. This indicates that Maryland’s employment in the industry is 15 percent below the industry’s national employment share and that Maryland’s compensation in the industry is 27 percent below the industry’s national compensation share. Compared to the other state’s LQs provided in Figure 4, Maryland is not an outlier, with Delaware at the lower end and D.C. at the upper end.

In addition to the role of the arts and culture industry in a state’s economy, individuals who attend related events or visit arts establishments also contribute to the economy. Figure 2, below, shows average event-related spending per person by residential status provided by Americans for the Arts.^{17,18} Resident attendees are defined as members of the audience who also live in the area of question, while nonresident attendees are members of the audience who travel to the locality to attend the event or visit the establishment.

Figure 5 shows that nonresident attendees, on average, spend almost double what resident attendees spend. The main cost difference driven by the overnight lodging category, where nonresident attendees spend 15 times more than their resident counterparts. This variation in spending patterns is not the only difference between the two groups: nonresident attendees are referred to as “economic visitors” and the dollars they spend are “new dollars” entering the

¹⁶ Bureau of Economic Analysis, “Definitions,” accessed May 26, 2020, <https://apps.bea.gov/regional/pdf/acpsa/definitions.pdf>.

¹⁷ “Arts & Economic Prosperity 5,” Americans for the Arts, 1, accessed May 21, 2020, https://www.americansforthearts.org/sites/default/files/pdf/2017/by_program/reports_and_data/aep5/map/MD_StateOfMaryland_AEP5_OnePageSummary.pdf

¹⁸ RESI then adjusted these spending estimates for inflation, from 2015 to 2020 dollars.

economy in question. On the other hand, resident attendees would be expected to spend locally even if they did not attend that specific event.

Figure 5: Nonprofit Arts and Cultural Event Attendees Average Spending Per Person

Expenditure Category	Resident Attendee	Nonresident Attendee
Meals and Refreshments	\$16.04	\$23.91
Souvenirs and Gifts	\$3.08	\$5.20
Ground Transportation	\$2.71	\$5.08
Overnight Lodging (one night)	\$0.55	\$8.43
Other/Miscellaneous	\$2.78	\$2.99
Total	\$25.16	\$45.62

Sources: Americans for the Arts, RESI

5.0 Economic Footprint and Impacts

This section contains the results of the economic analysis for Maryland’s A&E Districts. Calculations are based on the 2018 IMPLAN Model for the state of Maryland, the most current data available at the time of the analysis. Economic activity is considered in terms of employment, state GDP, and employee compensation based on attendee spending at district events and festivals held in FY 2019 and net new businesses that opened in the districts in FY 2019. For more detailed results, please see Appendix C. Throughout this section, please note that totals may not sum due to rounding.

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

This section provides an overview of the overall economic footprint of Maryland’s A&E Districts for FY 2019, including the:

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

Figure 6 below displays the total economic footprint of economic activity of Maryland’s A&E Districts in FY 2019. In general, older, more established districts tend to have larger economic impacts.

Please note that these figures are not directly comparable to past analyses due to changes in the underlying data in the economic model as well as recalibrations of spending patterns to better reflect current trends.

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Figure 6: Total Economic Footprint of Maryland's A&E Districts, FY 2019¹⁹

District	Designation Year	Employment	State GDP	Employee Compensation
Annapolis	2008	119	\$11,320,384	\$3,848,711
Bel Air	2010	89	\$14,522,003	\$2,523,913
Berlin	2005	35	\$3,911,878	\$1,214,212
Bethesda	2002	108	\$15,978,597	\$3,958,057
Bromo Tower	2013	21	\$4,456,401	\$501,257
Cambridge	2003	42	\$4,935,382	\$1,459,659
Chestertown	2015	10	\$775,851	\$234,590
Crisfield	2018	42	\$4,450,443	\$1,399,237
Cumberland	2002	84	\$10,920,123	\$3,480,405
Denton	2005	10	\$1,515,156	\$336,815
Elkton	2006	47	\$9,160,482	\$1,833,074
Frederick	2003	201	\$17,910,535	\$5,507,452
Frostburg	2009	34	\$4,729,340	\$1,465,476
Gateway	2002	50	\$4,821,559	\$1,364,204
Grantsville	2015	26	\$2,341,040	\$762,519
Hagerstown	2002	161	\$17,103,913	\$5,458,745
Havre de Grace	2008	106	\$10,988,678	\$3,913,418
Highlandtown	2003	27	\$3,012,182	\$803,456
Leonardtwn	2014	42	\$2,909,114	\$634,825
Oakland	2017	31	\$3,183,170	\$980,300
Salisbury	2007	8	-\$16,374,526	-\$1,170,041
Silver Spring	2002	112	\$2,381,194	\$2,916,192
Snow Hill	2006	-24	-\$2,076,822	-\$685,211
Station North	2002	112	\$11,552,684	\$3,852,875
Stevensville	2014	27	\$4,720,180	\$977,524
Wheaton	2006	101	\$8,465,080	\$3,264,151
Total	--	1,620	\$157,614,022	\$50,835,816

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

As seen above, Maryland's A&E Districts supported a total of 1,620 jobs, over \$157.6 million in state GDP, and over \$50.8 million in employee compensation in FY 2019. Data reported by Frederick had the largest effect on Maryland's economy, totaling 201 jobs, \$17.9 million in state GDP, and \$5.51 million in employee compensation.

¹⁹ Districts with negative impacts do not negatively affect the Maryland economy. Rather, they are the result of more businesses leaving the district than opened in a district within the study period, or if less resource-intensive employment replaces more resource-intensive employment. For example, if one physician job with a salary of \$150,000 is lost but two server jobs with wages of \$40,000 each are gained, there would still be a "loss" of \$70,000 even though the number of jobs increases by one.

Economic activity is distributed throughout the state, not concentrated within a single region. For instance, the Hagerstown A&E District in Western Maryland saw the second-largest footprint, at 161 jobs, \$17.1 million in state GDP, and \$5.46 million in employee compensation.

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

5.2 Event and Festival Attendee Footprint and Impact

In FY 2019, Maryland's 26 A&E Districts were home to 1,499 events and festivals, with reported attendance of nearly 2.0 million.²⁰ Based on data reported by Americans for the Arts, RESI estimated that approximately 84.9 percent of attendees were Maryland residents, while the other 15.1 percent were visitors from out of state.²¹ However, since out-of-state visitors tend to have higher spending levels than their in-state counterparts, they account for approximately 24.4 percent of attendee spending: on average in 2020 dollars, each out-of-state visitor spent approximately \$45.62, while each Maryland resident attendee spent approximately \$25.16.²²

Please note that these figures are not directly comparable to past analyses due to changes in the underlying data in the economic model as well as recalibrations of spending patterns to better reflect current trends.²³

Below, Figure 7 contains the statewide economic effects associated with attendee spending, presented by the residency of the visitor. Impacts associated with out-of-state visitors represent new dollars flowing into the Maryland economy, spurring additional activity. Footprint figures associated with Maryland residents represent spending that is directed to local economies where A&E districts are located. For impacts at the district level, please see Appendix C.

²⁰ Daraius Irani, et al, "FY 2019 Maryland's Arts and Entertainment District Survey Analysis," (May 26, 2020), 4.

²¹ Americans for the Arts, "The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland."

²² RESI analysis of Americans for the Arts data: Americans for the Arts, "The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland," 1.

²³ Though direct comparisons of the impacts cannot be made, the estimated number of visitors did increase from approximately 1.85 million to 1.97 million.

Figure 7: Statewide Economic Footprints of A&E District Event/Festival Attendee Spending, FY 2019

Activity Type	Direct	Indirect	Induced	Total
<i>Out-of-State Visitor Impact</i>				
Employment	179	23	28	229
State GDP	\$12,020,222	\$4,381,441	\$4,620,270	\$21,021,933
Employee Compensation	\$4,298,516	\$1,249,873	\$1,298,826	\$6,847,216
<i>In-state Attendee Footprint</i>				
Employment	554	70	87	711
State GDP	\$37,271,371	\$13,585,632	\$14,326,175	\$65,183,178
Employee Compensation	\$13,328,504	\$3,875,510	\$4,027,299	\$21,231,314
<i>Overall Attendee Footprint</i>				
Employment	732	93	115	940
State GDP	\$49,291,594	\$17,967,073	\$18,946,445	\$86,205,111
Employee Compensation	\$17,627,020	\$5,125,383	\$5,326,126	\$28,078,530

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

Overall spending by attendees at events and festivals in Maryland’s A&E Districts in FY 2019 directly supported 732 jobs, \$49.3 million in state GDP, and \$17.6 million in employee compensation. When economic activity associated with suppliers to these direct activities as well as additional spending by employees carrying out these activities, the total footprint grew to 940 jobs, \$86.2 million in state GDP, and \$28.1 million in employee compensation.

Of particular importance are the out-of-state visitor impacts, as they are the result of new dollars flowing into Maryland’s economy. Their expenditures supported a total of 229 jobs, over \$21.0 million in state GDP, and over \$6.8 million in employee compensation.

5.3 Net Business Growth Economic Impact

Businesses within Maryland’s A&E Districts contribute to the cultural offerings in their districts and bolster the Maryland economy. Statewide, there was a net growth of 61 retailers, 57 businesses, 33 restaurants, and 9 organizations with estimated employment of 529 workers.^{24,25} These net new businesses supported additional economic activity in Maryland’s economy, as presented in Figure 8.

Please note that these figures are not directly comparable to past analyses due to changes in the underlying data in the economic model. Furthermore, the average employment per establishment in FY 2019 was lower than in previous years. While this does lower the overall

²⁴ Daraius Irani, et al, “FY 2019 Maryland’s Arts and Entertainment District Survey Analysis,” (May 26, 2020), 4.

²⁵ In their annual reports, some districts reported employee counts for establishments that opened or closed; in cases where the district did not provide this information, RESI estimated employee counts based on data from prior years.

impact, it could indicate that businesses contributing to the cultural landscape in their districts are small businesses.²⁶

Figure 8: Economic Impacts of Net Business Growth in Maryland's A&E Districts, FY 2019

	Direct	Indirect	Induced	Total
Employment	529	59	93	680
state GDP	\$49,942,629	\$6,272,841	\$15,193,439	\$71,408,910
Employee Compensation	\$16,181,086	\$2,312,849	\$4,263,352	\$22,757,286

Sources: IMPLAN, MSAC, RESI

In FY 2019, the estimated 529 jobs in Maryland's A&E Districts supported an additional 152 jobs in Maryland's economy, for a total of 680 jobs. These 680 jobs paid total employee compensation of nearly \$22.8 million and are associated with \$74.4 million in state GDP.

6.0 Tax Revenue Footprints and Impacts

The economic footprints presented in the previous section produce corresponding tax impacts for local governments and the State of Maryland. In the cases of net new businesses and spending by out-of-state visitors, these taxes paid represent new dollars paid to state and local coffers. For any taxes paid by Maryland residents, these are not necessarily new tax revenues for state and local governments but rather represent the footprint or reach of spending associated with A&E Districts. Please note that IMPLAN does not separate state and local impacts.

Taxes paid to state and local governments as a result of economic activity tied to Maryland's A&E Districts are presented in Figure 9. For impacts at the district level, please see Appendix C.

Figure 9: Total Tax Revenue Footprint of Maryland's A&E Districts, FY 2019

Activity Type	Property	Income	Sales	Payroll	Other	Total
Out-of-State Visitor Impact	\$588,135	\$24,047	\$584,079	\$11,552	\$363,236	\$1,571,048
In-state Attendee Footprint	\$1,823,642	\$74,563	\$1,811,065	\$35,821	\$1,126,293	\$4,871,384
Business Net Growth Impact	\$2,225,270	\$784,944	\$2,246,604	\$38,699	\$652,696	\$5,948,213
Total Footprint	\$4,637,046	\$883,554	\$4,641,748	\$86,072	\$2,142,224	\$12,390,645

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

²⁶ Across all districts, the average retailer, business, restaurant, and/or organization that either opened or closed in FY 2019 was reported to have approximately 4 employees.

As seen above, state and local governments received nearly \$12.4 million in revenues associated with Maryland's A&E Districts. Sales and property tax revenues formed the majority of the tax revenue footprint, at a combined \$9.3 million. Additionally, tax impacts associated with out-of-state visitors were especially valuable to Maryland and local governments as they are associated with new dollars being injected into the state's economy.

7.0 Conclusion

Maryland's 26 A&E Districts contribute to the cultural fabric of the state as well as the economy. In FY 2019, activity associated with Maryland's A&E Districts supported 1,620 jobs, \$157.3 million in state GDP, \$50.8 million in employee compensation, and \$12.4 million in state and local tax revenues. This economic activity is shared throughout the state, ranging from dense, urban districts in Baltimore City and the suburbs of Washington, D.C., to sprawling districts that cover entire downtown areas on the Eastern Shore. As the A&E District program continues to grow, and local residents continue to establish districts in their communities, the arts and creative energy in the state will continue to flourish—and benefit the economy.

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Appendix A—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 economic and tax impact of each dollar earned and spent by the following: employees in the district, other supporting vendors (business services, retail, etc.), each dollar spent by these vendors on other firms, and each dollar spent by the households' employees, other vendors' employees, and other businesses' employees.

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

Consider the following example. A new firm opens in a region and directly employs 100 workers. The firm purchases supplies, both from outside the region as well as from local suppliers, which leads to increased business for local firms, thereby hypothetically creating jobs for another 100 workers. This is called the indirect effect. The workers at the firm and at suppliers spend their income mostly in the local area, hypothetically creating jobs for another 50 workers. This is the induced effect. The direct, indirect and induced effects add up to 250 jobs created from the original 100 jobs. Thus, in terms of employment, the total economic impact of the firm in our example is 250.²⁷

This analysis was conducted using the 2018 IMPLAN Model for the state of Maryland, the most recent data year available.

The 2018 IMPLAN Model contains significant changes in the underlying data as well as to the industry sector structure, results generated using this model cannot be compared to results from prior models.

B.2 IMPLAN Modeling Process

Impacts were determined based on two main factors. When data were not available from the districts, RESI estimated attendance and/or employment data based on prior years' data.

1. Net business growth within the districts' borders; that is, the increase in employment at firms that opened during FY 2019 less the employment at firms that closed in FY 2019; and

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

2. Estimated spending by attendees at events and festivals, based on attendance counts provided by the districts in their FY 2019 annual report and visitor spending data published by Americans for the Arts.

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

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

Figure 10: IMPLAN Codes Used in the Analysis

Code	Description
17	Commercial fishing
57	Construction of new single-family residential structures
106	Breweries
107	Wineries
152	Printing
402	Retail - Motor vehicle and parts dealers
403	Retail - Furniture and home furnishings stores
404	Retail - Electronics and appliance stores
405	Retail - Building material and garden equipment and supplies stores
406	Retail - Food and beverage stores
407	Retail - Health and personal care stores
409	Retail - Clothing and clothing accessories stores
410	Retail - Sporting goods, hobby, musical instrument and book stores
411	Retail - General merchandise stores
412	Retail - Miscellaneous store retailers
413	Retail - Nonstore retailers
414	Air transportation
418	Transit and ground passenger transportation
422	Warehousing and storage
423	Newspaper publishers
424	Periodical publishers
425	Book publishers
430	Sound recording industries

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Code	Description
431	Radio and television broadcasting
433	Wired telecommunications carriers
439	Nondepository credit intermediation and related activities
440	Securities and commodity contracts intermediation and brokerage
442	Other financial investment activities
445	Insurance agencies, brokerages, and related activities
446	Funds, trusts, and other financial vehicles
447	Other real estate
448	Tenant-occupied housing
455	Legal services
456	Accounting, tax preparation, bookkeeping, and payroll services
457	Architectural, engineering, and related services
458	Specialized design services
463	Environmental and other technical consulting services
465	Advertising, public relations, and related services
466	Photographic services
468	Marketing research and all other miscellaneous professional, scientific, and technical services
474	Travel arrangement and reservation services
476	Services to buildings
482	Other educational services
483	Offices of physicians
484	Offices of dentists
485	Offices of other health practitioners
486	Outpatient care centers
488	Home health care services
490	Hospitals
491	Nursing and community care facilities
492	Residential mental retardation, mental health, substance abuse and other facilities
496	Performing arts companies
499	Independent artists, writers, and performers
501	Museums, historical sites, zoos, and parks
502	Amusement parks and arcades
504	Other amusement and recreation industries
505	Fitness and recreational sports centers
507	Hotels and motels, including casino hotels
508	Other accommodations
509	Full-service restaurants
510	Limited-service restaurants
511	All other food and drinking places

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Code	Description
512	Automotive repair and maintenance, except car washes
516	Personal and household goods repair and maintenance
517	Personal care services
519	Dry-cleaning and laundry services
520	Other personal services
521	Religious organizations
522	Grant making, giving, and social advocacy organizations
523	Business and professional associations
524	Labor and civic organizations

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

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

Appendix B—Glossary

Figure 11: Glossary of Terms

Term	Definition
Economic Impact	This term refers to the changes in the economy resulting from an economic event and activities that support the event. Economic impacts are generated when the economic event is new or would not otherwise occur in the study region.
Economic footprint	This term refers to the additional economic activity supported by an initial activity. This initial activity would have occurred in the study region anyway.
Employment	This term refers to the number of jobs created or supported as a result of district activity which has been modeled in IMPLAN.
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 state GDP creation resulting from district activity which has been modeled in IMPLAN.

Source: RESI

Appendix C—Detailed Economic and Tax Impacts and Footprints

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

C.1 Employment

Figure 12: Out-of-State Visitor Employment Impacts

District	Direct	Indirect	Induced	Total
Annapolis	21	3	3	27
Bel Air	11	1	2	14
Berlin	1	0	0	2
Bethesda	8	1	1	10
Bromo	1	0	0	1
Cambridge	1	0	0	1
Chestertown	3	0	0	3
Crisfield	2	0	0	2
Cumberland	1	0	0	1
Denton	1	0	0	1
Elkton	2	0	0	3
Frederick	25	3	4	31
Frostburg	2	0	0	2
Gateway	1	0	0	2
Grantsville	5	1	1	6
Hagerstown	20	2	3	25
Havre de Grace	12	2	2	16
Highlandtown	1	0	0	1
Leonardtwn	3	0	0	4
Oakland	1	0	0	1
Salisbury	11	1	2	14
Silver Spring	21	3	3	27
Snow Hill	0	0	0	1
Station North	16	2	3	21
Stevensville	0	0	0	0
Wheaton	10	1	2	13
Total	179	23	28	229

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

Figure 13: In-state Attendee Employment Footprint

District	Direct	Indirect	Induced	Total
Annapolis	65	8	10	84
Bel Air	34	4	5	44
Berlin	4	0	1	5
Bethesda	24	3	4	31
Bromo	3	0	0	4
Cambridge	3	0	0	4
Chestertown	8	1	1	11
Crisfield	5	1	1	7
Cumberland	2	0	0	2
Denton	3	0	0	4
Elkton	6	1	1	8
Frederick	76	10	12	98
Frostburg	6	1	1	8
Gateway	4	1	1	6
Grantsville	15	2	2	19
Hagerstown	61	8	10	78
Havre de Grace	38	5	6	49
Highlandtown	2	0	0	3
Leonardtwn	9	1	1	11
Oakland	3	0	0	3
Salisbury	34	4	5	43
Silver Spring	65	8	10	84
Snow Hill	2	0	0	2
Station North	51	6	8	65
Stevensville	1	0	0	1
Wheaton	31	4	5	40
Total	554	70	87	711

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

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

District	Direct	Indirect	Induced	Total
Annapolis	86	11	14	111
Bel Air	45	6	7	58
Berlin	5	1	1	6
Bethesda	31	4	5	40
Bromo	4	0	1	5
Cambridge	4	0	1	5
Chestertown	11	1	2	14
Crisfield	7	1	1	9
Cumberland	2	0	0	3
Denton	4	0	1	5
Elkton	8	1	1	10
Frederick	101	13	16	129
Frostburg	8	1	1	10
Gateway	6	1	1	7
Grantsville	20	3	3	26
Hagerstown	80	10	13	103
Havre de Grace	50	6	8	64
Highlandtown	3	0	0	4
Leonardtwn	12	1	2	15
Oakland	3	0	1	4
Salisbury	44	6	7	57
Silver Spring	86	11	14	111
Snow Hill	2	0	0	3
Station North	67	9	11	87
Stevensville	1	0	0	1
Wheaton	41	5	6	52
Total	732	93	115	940

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

Figure 15: Net Business Growth Employment Impacts

District	Direct	Indirect	Induced	Total
Annapolis	6	0	2	8
Bel Air	22	4	5	31
Berlin	20	4	5	29
Bethesda	36	17	14	67
Bromo	12	2	2	16
Cambridge	24	6	7	37
Chestertown	-3	-1	-1	-4
Crisfield	24	4	5	33
Cumberland	56	10	15	81
Denton	2	2	1	5
Elkton	21	8	7	37
Frederick	59	5	8	72
Frostburg	14	4	5	24
Gateway	31	6	6	43
Grantsville ²⁸	0	0	0	0
Hagerstown	36	11	11	58
Havre de Grace	26	6	10	42
Highlandtown	16	4	3	23
Leonardtwn	24	2	1	27
Oakland	19	3	4	27
Salisbury	11	-50	-10	-49
Silver Spring	25	-1	-23	1
Snow Hill	-21	-2	-3	-27
Station North	17	3	5	26
Stevensville	16	6	4	26
Wheaton	36	5	8	49
Total	529	59	93	680

Sources: IMPLAN, MSAC, RESI

²⁸ Grantsville reported no net business growth in FY 2019.

Figure 16: Full Employment Footprint for Maryland's A&E Districts, FY 2019

District	Direct	Indirect	Induced	Total
Annapolis	92	11	16	119
Bel Air	67	10	12	89
Berlin	25	5	5	35
Bethesda	67	21	19	108
Bromo	16	2	3	21
Cambridge	28	7	8	42
Chestertown	8	1	1	10
Crisfield	31	5	6	42
Cumberland	58	10	16	84
Denton	6	2	2	10
Elkton	29	9	9	47
Frederick	160	18	24	201
Frostburg	22	5	7	34
Gateway	37	7	7	50
Grantsville	20	3	3	26
Hagerstown	116	21	24	161
Havre de Grace	76	12	18	106
Highlandtown	19	4	4	27
Leonardtwn	36	3	3	42
Oakland	22	4	5	31
Salisbury	55	-44	-3	8
Silver Spring	111	10	-10	112
Snow Hill	-19	-2	-3	-24
Station North	84	12	16	112
Stevensville	17	6	5	27
Wheaton	77	10	14	101
Total	1,261	151	208	1,620

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

C.2 Output or State GDP

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

District	Direct	Indirect	Induced	Total
Annapolis	\$1,418,096	\$516,894	\$545,073	\$2,480,062
Bel Air	\$737,703	\$268,892	\$283,551	\$1,290,145
Berlin	\$79,157	\$28,852	\$30,425	\$138,435
Bethesda	\$516,467	\$188,270	\$198,528	\$903,265
Bromo	\$62,984	\$22,960	\$24,211	\$110,154
Cambridge	\$59,908	\$21,837	\$23,027	\$104,772
Chestertown	\$182,549	\$66,539	\$70,166	\$319,255
Crisfield	\$116,528	\$42,474	\$44,790	\$203,793
Cumberland	\$40,446	\$14,743	\$15,546	\$70,735
Denton	\$60,208	\$21,946	\$23,142	\$105,296
Elkton	\$132,421	\$48,267	\$50,899	\$231,587
Frederick	\$1,649,875	\$601,436	\$634,206	\$2,885,516
Frostburg	\$127,800	\$46,583	\$49,122	\$223,505
Gateway	\$94,434	\$34,424	\$36,300	\$165,158
Grantsville	\$326,431	\$118,984	\$125,470	\$570,885
Hagerstown	\$1,320,112	\$481,179	\$507,411	\$2,308,703
Havre de Grace	\$820,906	\$299,219	\$315,531	\$1,435,657
Highlandtown	\$50,189	\$18,294	\$19,291	\$87,775
Leonardtwn	\$193,460	\$70,516	\$74,360	\$338,336
Oakland	\$55,474	\$20,222	\$21,324	\$97,020
Salisbury	\$729,341	\$265,844	\$280,336	\$1,275,522
Silver Spring	\$1,419,306	\$517,335	\$545,538	\$2,482,179
Snow Hill	\$33,441	\$12,189	\$12,854	\$58,485
Station North	\$1,107,734	\$403,768	\$425,779	\$1,937,281
Stevensville	\$16,901	\$6,160	\$6,496	\$29,558
Wheaton	\$668,351	\$243,613	\$256,894	\$1,168,858
Total	\$12,020,222	\$4,381,441	\$4,620,270	\$21,021,933

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

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Figure 18: In-state Attendee Spending State GDP Footprint

District	Direct	Indirect	Induced	Total
Annapolis	\$4,397,121	\$1,602,745	\$1,690,119	\$7,689,985
Bel Air	\$2,287,412	\$833,759	\$879,211	\$4,000,383
Berlin	\$245,443	\$89,464	\$94,341	\$429,247
Bethesda	\$1,601,420	\$583,772	\$615,580	\$2,800,773
Bromo	\$195,295	\$71,192	\$75,071	\$341,558
Cambridge	\$185,759	\$67,709	\$71,400	\$324,869
Chestertown	\$566,034	\$206,319	\$217,566	\$989,920
Crisfield	\$361,322	\$131,701	\$138,881	\$631,905
Cumberland	\$125,413	\$45,713	\$48,205	\$219,330
Denton	\$186,688	\$68,048	\$71,757	\$326,493
Elkton	\$410,600	\$149,663	\$157,822	\$718,085
Frederick	\$5,115,804	\$1,864,885	\$1,966,496	\$8,947,185
Frostburg	\$396,272	\$144,440	\$152,315	\$693,027
Gateway	\$292,813	\$106,740	\$112,556	\$512,109
Grantsville	\$1,012,172	\$368,935	\$389,048	\$1,770,155
Hagerstown	\$4,093,302	\$1,492,004	\$1,573,340	\$7,158,646
Havre de Grace	\$2,545,402	\$927,796	\$978,375	\$4,451,573
Highlandtown	\$155,623	\$56,725	\$59,817	\$272,165
Leonardtwn	\$599,866	\$218,650	\$230,570	\$1,049,086
Oakland	\$172,009	\$62,703	\$66,120	\$300,831
Salisbury	\$2,261,484	\$824,308	\$869,246	\$3,955,038
Silver Spring	\$4,400,873	\$1,604,113	\$1,691,561	\$7,696,547
Snow Hill	\$103,692	\$37,796	\$39,856	\$181,344
Station North	\$3,434,776	\$1,251,972	\$1,320,223	\$6,006,972
Stevensville	\$52,405	\$19,102	\$20,143	\$91,650
Wheaton	\$2,072,370	\$755,377	\$796,556	\$3,624,303
Total	\$37,271,371	\$13,585,632	\$14,326,175	\$65,183,178

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

FY 2019 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 19: Overall Attendee State GDP Footprint

District	Direct	Indirect	Induced	Total
Annapolis	\$5,815,216	\$2,119,639	\$2,235,192	\$10,170,047
Bel Air	\$3,025,115	\$1,102,651	\$1,162,762	\$5,290,528
Berlin	\$324,599	\$118,316	\$124,766	\$567,681
Bethesda	\$2,117,887	\$772,042	\$814,108	\$3,704,038
Bromo	\$258,279	\$94,151	\$99,281	\$451,712
Cambridge	\$245,668	\$89,546	\$94,427	\$429,641
Chestertown	\$748,584	\$272,858	\$287,733	\$1,309,174
Crisfield	\$477,850	\$174,176	\$183,671	\$835,697
Cumberland	\$165,859	\$60,455	\$63,751	\$290,065
Denton	\$246,896	\$89,993	\$94,899	\$431,789
Elkton	\$543,021	\$197,930	\$208,721	\$949,672
Frederick	\$6,765,679	\$2,466,321	\$2,600,701	\$11,832,701
Frostburg	\$524,071	\$191,023	\$201,437	\$916,532
Gateway	\$387,246	\$141,164	\$148,856	\$677,267
Grantsville	\$1,338,603	\$487,919	\$514,518	\$2,341,040
Hagerstown	\$5,413,414	\$1,973,183	\$2,080,751	\$9,467,349
Havre de Grace	\$3,366,308	\$1,227,015	\$1,293,906	\$5,887,230
Highlandtown	\$205,813	\$75,019	\$79,108	\$359,940
Leonardtwn	\$793,326	\$289,166	\$304,930	\$1,387,422
Oakland	\$227,482	\$82,925	\$87,443	\$397,851
Salisbury	\$2,990,826	\$1,090,152	\$1,149,582	\$5,230,560
Silver Spring	\$5,820,179	\$2,121,448	\$2,237,099	\$10,178,726
Snow Hill	\$137,134	\$49,985	\$52,710	\$239,829
Station North	\$4,542,511	\$1,655,740	\$1,746,002	\$7,944,253
Stevensville	\$69,306	\$25,262	\$26,639	\$121,208
Wheaton	\$2,740,721	\$998,990	\$1,053,449	\$4,793,160
Total	\$49,291,594	\$17,967,073	\$18,946,445	\$86,205,111

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

Figure 20: Net Business Growth State GDP Impacts

District	Direct	Indirect	Induced	Total
Annapolis	\$675,919	\$111,292	\$363,126	\$1,150,337
Bel Air	\$7,695,167	\$729,024	\$807,284	\$9,231,474
Berlin	\$1,755,943	\$828,226	\$760,028	\$3,344,197
Bethesda	\$6,918,897	\$3,066,391	\$2,289,272	\$12,274,560
Bromo	\$3,300,101	\$377,548	\$327,041	\$4,004,689
Cambridge	\$2,269,895	\$1,084,476	\$1,151,370	\$4,505,741
Chestertown	-\$308,527	-\$114,699	-\$110,097	-\$533,323
Crisfield	\$2,103,209	\$723,417	\$788,120	\$3,614,745
Cumberland	\$6,329,667	\$1,777,178	\$2,523,212	\$10,630,057
Denton	\$575,255	\$326,189	\$181,923	\$1,083,367
Elkton	\$5,257,579	\$1,771,471	\$1,181,759	\$8,210,810
Frederick	\$4,030,087	\$738,089	\$1,309,657	\$6,077,834
Frostburg	\$2,189,135	\$740,320	\$883,354	\$3,812,809
Gateway	\$2,114,267	\$1,062,539	\$967,487	\$4,144,293
Grantsville ²⁹	\$0	\$0	\$0	\$0
Hagerstown	\$3,918,162	\$1,890,217	\$1,828,185	\$7,636,564
Havre de Grace	\$2,574,572	\$934,741	\$1,592,135	\$5,101,448
Highlandtown	\$1,478,897	\$632,908	\$540,438	\$2,652,243
Leonardtwn	\$916,647	\$398,914	\$206,131	\$1,521,691
Oakland	\$1,518,995	\$564,510	\$701,814	\$2,785,319
Salisbury	-\$6,835,727	-\$13,106,326	-\$1,663,034	-\$21,605,087
Silver Spring	-\$3,627,370	-\$428,485	-\$3,741,677	-\$7,797,532
Snow Hill	-\$1,275,779	-\$477,311	-\$563,561	-\$2,316,651
Station North	\$2,077,131	\$664,822	\$866,479	\$3,608,431
Stevensville	\$2,783,587	\$1,108,080	\$707,306	\$4,598,973
Wheaton	\$1,506,920	\$869,312	\$1,295,688	\$3,671,920
Total	\$49,942,629	\$6,272,841	\$15,193,439	\$71,408,910

Sources: IMPLAN, MSAC, RESI

²⁹ Grantsville reported no net business growth in FY 2019.

FY 2019 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 21: Full State GDP Footprint for Maryland's A&E Districts, FY 2019

District	Direct	Indirect	Induced	Total
Annapolis	\$6,491,135	\$2,230,931	\$2,598,318	\$11,320,384
Bel Air	\$10,720,282	\$1,831,675	\$1,970,046	\$14,522,003
Berlin	\$2,080,542	\$946,542	\$884,794	\$3,911,878
Bethesda	\$9,036,784	\$3,838,433	\$3,103,380	\$15,978,597
Bromo	\$3,558,380	\$471,699	\$426,322	\$4,456,401
Cambridge	\$2,515,563	\$1,174,022	\$1,245,797	\$4,935,382
Chestertown	\$440,057	\$158,159	\$177,636	\$775,851
Crisfield	\$2,581,059	\$897,593	\$971,791	\$4,450,443
Cumberland	\$6,495,526	\$1,837,633	\$2,586,964	\$10,920,123
Denton	\$822,151	\$416,182	\$276,822	\$1,515,156
Elkton	\$5,800,600	\$1,969,402	\$1,390,480	\$9,160,482
Frederick	\$10,795,766	\$3,204,411	\$3,910,359	\$17,910,535
Frostburg	\$2,713,206	\$931,343	\$1,084,791	\$4,729,340
Gateway	\$2,501,513	\$1,203,703	\$1,116,343	\$4,821,559
Grantsville	\$1,338,603	\$487,919	\$514,518	\$2,341,040
Hagerstown	\$9,331,576	\$3,863,400	\$3,908,937	\$17,103,913
Havre de Grace	\$5,940,880	\$2,161,757	\$2,886,041	\$10,988,678
Highlandtown	\$1,684,710	\$707,927	\$619,546	\$3,012,182
Leonardtwn	\$1,709,972	\$688,080	\$511,061	\$2,909,114
Oakland	\$1,746,478	\$647,435	\$789,258	\$3,183,170
Salisbury	-\$3,844,901	-\$12,016,173	-\$513,452	-\$16,374,526
Silver Spring	\$2,192,809	\$1,692,963	-\$1,504,578	\$2,381,194
Snow Hill	-\$1,138,645	-\$427,326	-\$510,851	-\$2,076,822
Station North	\$6,619,641	\$2,320,562	\$2,612,482	\$11,552,684
Stevensville	\$2,852,894	\$1,133,342	\$733,945	\$4,720,180
Wheaton	\$4,247,641	\$1,868,302	\$2,349,137	\$8,465,080
Total	\$99,234,223	\$24,239,914	\$34,139,885	\$157,614,022

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

C.3 Employee Compensation

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

District	Direct	Indirect	Induced	Total
Annapolis	\$507,123	\$147,450	\$153,228	\$807,801
Bel Air	\$263,809	\$76,705	\$79,710	\$420,224
Berlin	\$28,307	\$8,231	\$8,553	\$45,091
Bethesda	\$184,689	\$53,709	\$55,809	\$294,208
Bromo	\$22,523	\$6,550	\$6,806	\$35,879
Cambridge	\$21,424	\$6,229	\$6,473	\$34,126
Chestertown	\$65,281	\$18,981	\$19,725	\$103,987
Crisfield	\$41,672	\$12,116	\$12,591	\$66,379
Cumberland	\$14,464	\$4,205	\$4,370	\$23,040
Denton	\$21,531	\$6,260	\$6,506	\$34,297
Elkton	\$47,355	\$13,769	\$14,308	\$75,432
Frederick	\$589,997	\$171,576	\$178,285	\$939,858
Frostburg	\$45,702	\$13,288	\$13,809	\$72,800
Gateway	\$33,770	\$9,820	\$10,204	\$53,795
Grantsville	\$116,734	\$33,942	\$35,272	\$185,947
Hagerstown	\$472,083	\$137,262	\$142,641	\$751,986
Havre de Grace	\$293,563	\$85,356	\$88,701	\$467,619
Highlandtown	\$17,948	\$5,219	\$5,423	\$28,590
Leonardtwn	\$69,183	\$20,116	\$20,904	\$110,202
Oakland	\$19,837	\$5,769	\$5,994	\$31,601
Salisbury	\$260,819	\$75,835	\$78,807	\$415,461
Silver Spring	\$507,556	\$147,576	\$153,359	\$808,491
Snow Hill	\$11,959	\$3,477	\$3,613	\$19,049
Station North	\$396,135	\$115,180	\$119,693	\$631,008
Stevensville	\$6,044	\$1,757	\$1,826	\$9,627
Wheaton	\$239,008	\$69,494	\$72,217	\$380,718
Total	\$4,298,516	\$1,249,873	\$1,298,826	\$6,847,216

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

FY 2019 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 23: In-state Attendee Spending Employee Compensation Footprint

District	Direct	Indirect	Induced	Total
Annapolis	\$1,572,448	\$457,203	\$475,117	\$2,504,768
Bel Air	\$817,998	\$237,840	\$247,159	\$1,302,997
Berlin	\$87,772	\$25,521	\$26,521	\$139,814
Bethesda	\$572,670	\$166,537	\$173,049	\$912,256
Bromo	\$69,838	\$20,309	\$21,104	\$111,251
Cambridge	\$66,429	\$19,315	\$20,072	\$105,816
Chestertown	\$202,419	\$58,855	\$61,161	\$322,435
Crisfield	\$129,212	\$37,569	\$39,041	\$205,823
Cumberland	\$44,849	\$13,040	\$13,551	\$71,440
Denton	\$66,761	\$19,411	\$20,172	\$106,345
Elkton	\$146,834	\$42,693	\$44,366	\$233,893
Frederick	\$1,829,418	\$532,010	\$552,811	\$2,914,240
Frostburg	\$141,710	\$41,203	\$42,818	\$225,731
Gateway	\$104,710	\$30,451	\$31,641	\$166,802
Grantsville	\$361,961	\$105,243	\$109,367	\$576,572
Hagerstown	\$1,463,799	\$425,612	\$442,289	\$2,331,701
Havre de Grace	\$910,257	\$264,665	\$275,036	\$1,449,958
Highlandtown	\$55,652	\$16,181	\$16,815	\$88,649
Leonardtwn	\$214,517	\$62,373	\$64,817	\$341,706
Oakland	\$61,510	\$17,888	\$18,587	\$97,985
Salisbury	\$808,726	\$235,144	\$244,358	\$1,288,228
Silver Spring	\$1,573,789	\$457,593	\$475,523	\$2,506,905
Snow Hill	\$37,081	\$10,782	\$11,204	\$59,067
Station North	\$1,228,305	\$357,140	\$371,134	\$1,956,580
Stevensville	\$18,741	\$5,449	\$5,662	\$29,852
Wheaton	\$741,097	\$215,481	\$223,924	\$1,180,501
Total	\$13,328,504	\$3,875,510	\$4,027,299	\$21,231,314

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

FY 2019 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 24: Overall Attendee Spending Employee Compensation Footprint

District	Direct	Indirect	Induced	Total
Annapolis	\$2,079,570	\$604,653	\$628,345	\$3,312,569
Bel Air	\$1,081,807	\$314,545	\$326,870	\$1,723,221
Berlin	\$116,079	\$33,751	\$35,074	\$184,904
Bethesda	\$757,359	\$220,247	\$228,858	\$1,206,464
Bromo	\$92,361	\$26,859	\$27,910	\$147,130
Cambridge	\$87,853	\$25,544	\$26,545	\$139,942
Chestertown	\$267,700	\$77,836	\$80,886	\$426,422
Crisfield	\$170,883	\$49,686	\$51,632	\$272,202
Cumberland	\$59,313	\$17,245	\$17,921	\$94,480
Denton	\$88,292	\$25,672	\$26,678	\$140,641
Elkton	\$194,189	\$56,462	\$58,674	\$309,325
Frederick	\$2,419,416	\$703,587	\$731,096	\$3,854,098
Frostburg	\$187,412	\$54,492	\$56,627	\$298,531
Gateway	\$138,480	\$40,271	\$41,846	\$220,596
Grantsville	\$478,696	\$139,185	\$144,639	\$762,519
Hagerstown	\$1,935,883	\$562,875	\$584,930	\$3,083,687
Havre de Grace	\$1,203,820	\$350,021	\$363,736	\$1,917,578
Highlandtown	\$73,600	\$21,400	\$22,238	\$117,239
Leonardtwn	\$283,700	\$82,488	\$85,720	\$451,909
Oakland	\$81,348	\$23,657	\$24,582	\$129,586
Salisbury	\$1,069,544	\$310,979	\$323,165	\$1,703,688
Silver Spring	\$2,081,345	\$605,169	\$628,882	\$3,315,396
Snow Hill	\$49,040	\$14,259	\$14,817	\$78,117
Station North	\$1,624,440	\$472,320	\$490,827	\$2,587,587
Stevensville	\$24,785	\$7,206	\$7,489	\$39,479
Wheaton	\$980,105	\$284,974	\$296,140	\$1,561,219
Total	\$17,627,020	\$5,125,383	\$5,326,126	\$28,078,530

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

FY 2019 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 25: Net Business Growth Employee Compensation Impacts

District	Direct	Indirect	Induced	Total
Annapolis	\$381,626	\$52,595	\$101,921	\$536,142
Bel Air	\$370,743	\$202,513	\$227,435	\$800,692
Berlin	\$596,200	\$219,584	\$213,523	\$1,029,308
Bethesda	\$1,207,665	\$900,020	\$643,909	\$2,751,594
Bromo	\$162,070	\$99,984	\$92,072	\$354,127
Cambridge	\$713,087	\$282,643	\$323,988	\$1,319,718
Chestertown	-\$128,706	-\$32,289	-\$30,838	-\$191,832
Crisfield	\$694,334	\$211,415	\$221,286	\$1,127,035
Cumberland	\$2,196,646	\$480,718	\$708,561	\$3,385,926
Denton	\$77,716	\$67,239	\$51,219	\$196,174
Elkton	\$744,775	\$446,802	\$332,172	\$1,523,748
Frederick	\$1,084,725	\$200,431	\$368,199	\$1,653,354
Frostburg	\$654,660	\$264,050	\$248,235	\$1,166,945
Gateway	\$608,922	\$262,516	\$272,169	\$1,143,607
Grantsville ³⁰	\$0	\$0	\$0	\$0
Hagerstown	\$1,341,157	\$520,069	\$513,832	\$2,375,058
Havre de Grace	\$1,247,907	\$300,289	\$447,645	\$1,995,841
Highlandtown	\$356,067	\$178,220	\$151,931	\$686,218
Leonardtwn	\$48,057	\$76,740	\$58,120	\$182,917
Oakland	\$505,102	\$148,226	\$197,385	\$850,713
Salisbury	\$878,155	-\$3,286,019	-\$465,866	-\$2,873,730
Silver Spring	\$560,992	\$101,135	-\$1,061,330	-\$399,203
Snow Hill	-\$478,951	-\$126,050	-\$158,327	-\$763,328
Station North	\$825,973	\$196,084	\$243,231	\$1,265,288
Stevensville	\$425,913	\$313,377	\$198,755	\$938,045
Wheaton	\$1,106,251	\$232,556	\$364,125	\$1,702,932
Total	\$16,181,086	\$2,312,849	\$4,263,352	\$22,757,286

Sources: IMPLAN, MSAC, RESI

³⁰ Grantsville reported no net business growth in FY 2019.

FY 2019 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 26: Full Employee Compensation Footprint of Maryland's A&E Districts, FY 2019

District	Direct	Indirect	Induced	Total
Annapolis	\$2,461,197	\$657,248	\$730,266	\$3,848,711
Bel Air	\$1,452,550	\$517,058	\$554,305	\$2,523,913
Berlin	\$712,279	\$253,335	\$248,597	\$1,214,212
Bethesda	\$1,965,024	\$1,120,266	\$872,767	\$3,958,057
Bromo	\$254,431	\$126,844	\$119,982	\$501,257
Cambridge	\$800,940	\$308,187	\$350,533	\$1,459,659
Chestertown	\$138,994	\$45,548	\$50,048	\$234,590
Crisfield	\$865,218	\$261,100	\$272,919	\$1,399,237
Cumberland	\$2,255,959	\$497,964	\$726,483	\$3,480,405
Denton	\$166,008	\$92,910	\$77,896	\$336,815
Elkton	\$938,964	\$503,264	\$390,846	\$1,833,074
Frederick	\$3,504,140	\$904,018	\$1,099,294	\$5,507,452
Frostburg	\$842,072	\$318,542	\$304,862	\$1,465,476
Gateway	\$747,401	\$302,787	\$314,015	\$1,364,204
Grantsville	\$478,696	\$139,185	\$144,639	\$762,519
Hagerstown	\$3,277,039	\$1,082,943	\$1,098,762	\$5,458,745
Havre de Grace	\$2,451,727	\$650,310	\$811,381	\$3,913,418
Highlandtown	\$429,667	\$199,620	\$174,169	\$803,456
Leonardtwn	\$331,757	\$159,228	\$143,840	\$634,825
Oakland	\$586,450	\$171,882	\$221,967	\$980,300
Salisbury	\$1,947,699	-\$2,975,040	-\$142,701	-\$1,170,041
Silver Spring	\$2,642,337	\$706,304	-\$432,449	\$2,916,192
Snow Hill	-\$429,910	-\$111,791	-\$143,510	-\$685,211
Station North	\$2,450,413	\$668,404	\$734,058	\$3,852,875
Stevensville	\$450,698	\$320,583	\$206,243	\$977,524
Wheaton	\$2,086,356	\$517,530	\$660,265	\$3,264,151
Total	\$33,808,106	\$7,438,231	\$9,589,477	\$50,835,816

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

C.4 State and Local Tax Revenue Footprint

Figure 27: Total State and Local Tax Impacts of Out-of-State Visitor Spending

A&E District	Property	Income	Sales	Payroll	Other	Total
Annapolis	\$69,380	\$2,837	\$68,901	\$1,363	\$42,852	\$185,333
Bel Air	\$36,092	\$1,476	\$35,843	\$709	\$22,292	\$96,411
Berlin	\$3,873	\$158	\$3,846	\$76	\$2,392	\$10,345
Bethesda	\$25,279	\$1,033	\$25,104	\$496	\$15,609	\$67,521
Bromo	\$3,083	\$126	\$3,061	\$61	\$1,904	\$8,234
Cambridge	\$2,931	\$120	\$2,911	\$58	\$1,810	\$7,830
Chestertown	\$8,931	\$365	\$8,870	\$175	\$5,516	\$23,858
Crisfield	\$5,701	\$233	\$5,662	\$112	\$3,521	\$15,229
Cumberland	\$1,979	\$81	\$1,965	\$39	\$1,222	\$5,286
Denton	\$2,946	\$120	\$2,925	\$58	\$1,819	\$7,869
Elkton	\$6,479	\$265	\$6,434	\$127	\$4,001	\$17,306
Frederick	\$80,753	\$3,301	\$80,197	\$1,586	\$49,864	\$215,700
Frostburg	\$6,253	\$256	\$6,209	\$123	\$3,862	\$16,702
Gateway	\$4,622	\$189	\$4,590	\$91	\$2,854	\$12,346
Grantsville	\$15,971	\$653	\$15,860	\$314	\$9,864	\$42,662
Hagerstown	\$64,586	\$2,641	\$64,141	\$1,269	\$39,891	\$172,527
Havre de Grace	\$40,163	\$1,642	\$39,886	\$789	\$24,806	\$107,285
Highlandtown	\$2,455	\$100	\$2,439	\$48	\$1,517	\$6,559
Leonardtown	\$9,465	\$387	\$9,400	\$186	\$5,846	\$25,284
Oakland	\$2,715	\$111	\$2,696	\$53	\$1,677	\$7,252
Salisbury	\$35,683	\$1,459	\$35,437	\$701	\$22,039	\$95,319
Silver Spring	\$69,439	\$2,839	\$68,960	\$1,364	\$42,888	\$185,491
Snow Hill	\$1,636	\$67	\$1,625	\$32	\$1,011	\$4,370
Station North	\$54,196	\$2,216	\$53,822	\$1,065	\$33,473	\$144,771
Stevensville	\$827	\$34	\$821	\$16	\$511	\$2,209
Wheaton	\$32,699	\$1,337	\$32,473	\$642	\$20,196	\$87,348
Total	\$588,135	\$24,047	\$584,079	\$11,552	\$363,236	\$1,571,048

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

FY 2019 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 28: Total State and Local Tax Footprint of In-state Visitor Spending

A&E District	Property	Income	Sales	Payroll	Other	Total
Annapolis	\$215,128	\$8,797	\$213,644	\$4,226	\$132,871	\$574,666
Bel Air	\$111,911	\$4,576	\$111,139	\$2,198	\$69,120	\$298,945
Berlin	\$12,008	\$491	\$11,925	\$236	\$7,417	\$32,077
Bethesda	\$78,382	\$3,204	\$77,841	\$1,539	\$48,399	\$209,365
Bromo	\$9,559	\$391	\$9,493	\$188	\$5,902	\$25,532
Cambridge	\$9,088	\$372	\$9,026	\$179	\$5,613	\$24,277
Chestertown	\$27,693	\$1,132	\$27,502	\$544	\$17,104	\$73,976
Crisfield	\$17,678	\$723	\$17,556	\$347	\$10,918	\$47,222
Cumberland	\$6,136	\$251	\$6,093	\$121	\$3,790	\$16,390
Denton	\$9,134	\$373	\$9,071	\$179	\$5,641	\$24,399
Elkton	\$20,088	\$821	\$19,950	\$395	\$12,407	\$53,662
Frederick	\$250,394	\$10,235	\$248,667	\$4,917	\$154,614	\$668,826
Frostburg	\$19,387	\$793	\$19,254	\$381	\$11,974	\$51,789
Gateway	\$14,332	\$586	\$14,233	\$281	\$8,850	\$38,282
Grantsville	\$49,520	\$2,025	\$49,179	\$973	\$30,586	\$132,282
Hagerstown	\$200,264	\$8,189	\$198,882	\$3,934	\$123,690	\$534,959
Havre de Grace	\$124,533	\$5,092	\$123,674	\$2,446	\$76,916	\$332,662
Highlandtown	\$7,614	\$311	\$7,561	\$150	\$4,703	\$20,339
Leonardtwn	\$29,348	\$1,200	\$29,146	\$577	\$18,127	\$78,397
Oakland	\$8,419	\$344	\$8,361	\$165	\$5,199	\$22,488
Salisbury	\$110,642	\$4,524	\$109,879	\$2,173	\$68,337	\$295,556
Silver Spring	\$215,311	\$8,804	\$213,826	\$4,230	\$132,984	\$575,156
Snow Hill	\$5,073	\$207	\$5,038	\$100	\$3,133	\$13,552
Station North	\$168,045	\$6,871	\$166,886	\$3,301	\$103,791	\$448,896
Stevensville	\$2,564	\$105	\$2,546	\$50	\$1,584	\$6,849
Wheaton	\$101,390	\$4,146	\$100,691	\$1,992	\$62,622	\$270,841
Total	\$1,823,642	\$74,563	\$1,811,065	\$35,821	\$1,126,293	\$4,871,384

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

FY 2019 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 29: Total State and Local Tax Footprint of All Attendee Spending

A&E District	Property	Income	Sales	Payroll	Other	Total
Annapolis	\$284,508	\$11,634	\$282,546	\$5,589	\$175,723	\$759,998
Bel Air	\$148,003	\$6,052	\$146,982	\$2,907	\$91,412	\$395,356
Berlin	\$15,881	\$649	\$15,771	\$312	\$9,809	\$42,422
Bethesda	\$103,660	\$4,237	\$102,946	\$2,036	\$64,008	\$276,887
Bromo	\$12,641	\$517	\$12,554	\$248	\$7,806	\$33,767
Cambridge	\$12,019	\$491	\$11,936	\$236	\$7,424	\$32,107
Chestertown	\$36,624	\$1,498	\$36,372	\$719	\$22,620	\$97,833
Crisfield	\$23,379	\$956	\$23,217	\$459	\$14,440	\$62,451
Cumberland	\$8,115	\$332	\$8,059	\$159	\$5,012	\$21,676
Denton	\$12,079	\$494	\$11,996	\$237	\$7,461	\$32,267
Elkton	\$26,567	\$1,086	\$26,384	\$522	\$16,409	\$70,968
Frederick	\$331,147	\$13,535	\$328,864	\$6,503	\$204,477	\$884,526
Frostburg	\$25,640	\$1,048	\$25,463	\$504	\$15,836	\$68,492
Gateway	\$18,954	\$775	\$18,823	\$372	\$11,704	\$50,628
Grantsville	\$65,491	\$2,678	\$65,039	\$1,286	\$40,450	\$174,944
Hagerstown	\$264,850	\$10,830	\$263,023	\$5,203	\$163,581	\$707,486
Havre de Grace	\$164,696	\$6,734	\$163,560	\$3,235	\$101,722	\$439,947
Highlandtown	\$10,069	\$412	\$10,000	\$198	\$6,219	\$26,898
Leonardtwn	\$38,813	\$1,587	\$38,546	\$762	\$23,972	\$103,681
Oakland	\$11,134	\$455	\$11,057	\$219	\$6,875	\$29,740
Salisbury	\$146,325	\$5,983	\$145,316	\$2,874	\$90,376	\$390,875
Silver Spring	\$284,751	\$11,644	\$282,787	\$5,594	\$175,872	\$760,647
Snow Hill	\$6,709	\$274	\$6,663	\$132	\$4,144	\$17,922
Station North	\$222,241	\$9,087	\$220,708	\$4,366	\$137,264	\$593,667
Stevensville	\$3,391	\$139	\$3,367	\$67	\$2,094	\$9,058
Wheaton	\$134,089	\$5,483	\$133,164	\$2,634	\$82,818	\$358,189
Total	\$2,411,776	\$98,610	\$2,395,144	\$47,373	\$1,489,528	\$6,442,432

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

FY 2019 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 30: Total State and Local Tax Impact of Net Business Growth

A&E District	Property	Income	Sales	Payroll	Other	Total
Annapolis	\$33,006	\$18,785	\$33,227	\$912	\$9,554	\$95,484
Bel Air	\$292,211	\$42,925	\$295,813	\$1,362	\$105,285	\$737,596
Berlin	\$109,910	\$39,594	\$110,953	\$1,751	\$29,126	\$291,334
Bethesda	\$277,483	\$120,296	\$279,845	\$4,679	\$92,404	\$774,707
Bromo	\$154,011	\$17,301	\$155,980	\$602	\$48,999	\$376,893
Cambridge	\$75,373	\$60,693	\$75,641	\$2,244	\$27,467	\$241,418
Chestertown	-\$15,630	-\$5,608	-\$15,778	-\$326	-\$4,342	-\$41,684
Crisfield	\$87,542	\$40,880	\$88,248	\$1,917	\$27,499	\$246,086
Cumberland	\$245,604	\$131,464	\$247,361	\$5,757	\$81,923	\$712,109
Denton	\$14,741	\$9,627	\$14,824	\$334	\$5,916	\$45,442
Elkton	\$164,412	\$61,791	\$165,937	\$2,591	\$48,421	\$443,152
Frederick	\$197,174	\$68,584	\$199,077	\$2,812	\$58,662	\$526,309
Frostburg	\$89,308	\$46,106	\$89,970	\$1,984	\$29,366	\$256,734
Gateway	\$82,542	\$50,897	\$83,043	\$1,945	\$26,785	\$245,212
Grantsville ³¹	\$0	\$0	\$0	\$0	\$0	\$0
Hagerstown	\$140,158	\$95,539	\$140,888	\$4,039	\$47,659	\$428,283
Havre de Grace	\$57,891	\$83,419	\$57,608	\$3,394	\$27,305	\$229,617
Highlandtown	\$74,578	\$28,290	\$75,267	\$1,166	\$21,601	\$200,902
Leonardtwn	\$82,738	\$11,024	\$83,773	\$311	\$17,150	\$194,996
Oakland	\$66,148	\$36,857	\$66,602	\$1,447	\$20,440	\$191,494
Salisbury	-\$163,254	-\$84,788	-\$164,457	-\$4,887	-\$83,777	-\$501,163
Silver Spring	\$41,490	-\$208,799	\$44,863	-\$679	-\$28,427	-\$151,552
Snow Hill	-\$74,268	-\$29,358	-\$74,938	-\$1,298	-\$19,918	-\$199,780
Station North	\$71,089	\$44,866	\$71,507	\$2,152	\$24,956	\$214,570
Stevensville	\$76,014	\$36,906	\$76,609	\$1,595	\$23,514	\$214,638
Wheaton	\$44,999	\$67,653	\$44,741	\$2,895	\$15,128	\$175,416
Total	\$2,225,270	\$784,944	\$2,246,604	\$38,699	\$652,696	\$5,948,213

Sources: IMPLAN, MSAC, RESI

³¹ Grantsville reported no net business growth in FY 2019.

FY 2019 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 31: Total State and Local Tax Footprint of Maryland's A&E Districts, FY 2019

District	Property	Income	Sales	Payroll	Other	Total
Annapolis	\$317,514	\$30,419	\$315,773	\$6,501	\$185,277	\$855,482
Bel Air	\$440,214	\$48,977	\$442,795	\$4,269	\$196,697	\$1,132,952
Berlin	\$125,791	\$40,243	\$126,724	\$2,063	\$38,935	\$333,756
Bethesda	\$381,143	\$124,533	\$382,791	\$6,715	\$156,412	\$1,051,594
Bromo	\$166,652	\$17,818	\$168,534	\$850	\$56,805	\$410,660
Cambridge	\$87,392	\$61,184	\$87,577	\$2,480	\$34,891	\$273,525
Chestertown	\$20,994	-\$4,110	\$20,594	\$393	\$18,278	\$56,149
Crisfield	\$110,921	\$41,836	\$111,465	\$2,376	\$41,939	\$308,537
Cumberland	\$253,719	\$131,796	\$255,420	\$5,916	\$86,935	\$733,785
Denton	\$26,820	\$10,121	\$26,820	\$571	\$13,377	\$77,709
Elkton	\$190,979	\$62,877	\$192,321	\$3,113	\$64,830	\$514,120
Frederick	\$528,321	\$82,119	\$527,941	\$9,315	\$263,139	\$1,410,835
Frostburg	\$114,948	\$47,154	\$115,433	\$2,488	\$45,202	\$325,226
Gateway	\$101,496	\$51,672	\$101,866	\$2,317	\$38,489	\$295,840
Grantsville	\$65,491	\$2,678	\$65,039	\$1,286	\$40,450	\$174,944
Hagerstown	\$405,008	\$106,369	\$403,911	\$9,242	\$211,240	\$1,135,769
Havre de Grace	\$222,587	\$90,153	\$221,168	\$6,629	\$129,027	\$669,564
Highlandtown	\$84,647	\$28,702	\$85,267	\$1,364	\$27,820	\$227,800
Leonardtwn	\$121,551	\$12,611	\$122,319	\$1,073	\$41,122	\$298,677
Oakland	\$77,282	\$37,312	\$77,659	\$1,666	\$27,315	\$221,234
Salisbury	-\$16,929	-\$78,805	-\$19,141	-\$2,013	\$6,599	-\$110,288
Silver Spring	\$326,241	-\$197,155	\$327,650	\$4,915	\$147,445	\$609,095
Snow Hill	-\$67,559	-\$29,084	-\$68,275	-\$1,166	-\$15,774	-\$181,858
Station North	\$293,330	\$53,953	\$292,215	\$6,518	\$162,220	\$808,237
Stevensville	\$79,405	\$37,045	\$79,976	\$1,662	\$25,608	\$223,696
Wheaton	\$179,088	\$73,136	\$177,905	\$5,529	\$97,946	\$533,605
Total	\$4,637,046	\$883,554	\$4,641,748	\$86,072	\$2,142,224	\$12,390,645

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

Appendix D—District Websites

Figure 32: A&E District Websites

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

Sources: MSAC, RESI

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