

Maryland Arts and Entertainment District Survey Analysis FY 2019

Prepared for
Maryland State Arts Council

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Table of Contents

Table of Figures	3	1.0 Executive Summary	4	2.0 Introduction	6	3.0 Survey Analysis	6
3.1 FY 2019 Accomplishments	6	3.2 Closings	8	3.3 FY 2019 Challenges	11	3.4 District Events and Festivals During FY 2019	12
3.5 District Assets	15	3.6 Benefit Information	20	3.7 Public Funding	25	3.8 FY 2019 Goals and Work Plan	32
3.9 MSAC Technical Assistance	32	4.0 Conclusion	33	5.0 References	35	Appendix A—Maryland Arts and Entertainment District Annual Report	36



2

Table of Figures

Figure 1: New Entities by District, FY 2019 7 Figure 2: Closures by A&E District, FY 2019 9 Figure 3: Net Changes in Retailers, Businesses, Restaurants, and Organizations by District, FY 2019 11 Figure 4: Number of Districts Reporting Challenges by Type of Challenge, FY 2019 12 Figure 5: Events by District, FY 2019 13 Figure 6: Festivals by District, FY 2019 14 Figure 7: Enterprises by District, FY 2019 15 Figure 8: Enterprises by Type in Maryland's A&E Districts, FY 2019 16 Figure 9: Public Art by District, FY 2019 17 Figure 10: Artist Housing by District, FY 2019 18 Figure 11: Occupancy Rate by Type of Real Estate by District, FY 2019 19 Figure 12: Registered Artists by District, FY 2019 20 Figure 13: Estimated Artists by District, FY 2019 21 Figure 14: Businesses' Tax Incentive Utilization by District, FY 2019 22 Figure 15: Incentives Reported by A&E District, FY 2019 24 Figure 16: Use of Communication Tools, FY 2019 25 Figure 17: A&E Districts Receiving Federal Funding, FY 2019 25 Figure 18: A&E Districts Receiving Funding from MSAC, FY 2019 26 Figure 19: A&E Districts Receiving Other State Funding, FY 2019 27 Figure 20: A&E Districts Receiving Local Funding, FY 2019 28 Figure 21: A&E Districts Receiving Operating Support, FY 2019 29 Figure 22: A&E Districts Receiving In-Kind Support, FY 2019 30 Figure 23: Technical Assistance Requested, FY 2019 33

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." Each A&E District has unique economic development goals and priorities, which can ¹ 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 the Regional Economic Studies Institute (RESI) of Towson University 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. It is important to note that all data are self-reported by the A&E Districts.

RESI's analysis of the survey data includes the following:

- There were a total of:
 - o 213 new capital projects;
 - o 109 new retailers;
 - o 99 new businesses;
 - o 75 new restaurants; and
 - o 17 new organizations.

- Despite various business closures, the number of new openings was great enough to net:
 - o 61 retailers;
 - o 57 businesses;
 - o 33 restaurants; and
 - o 9 organization.
- Challenges that Maryland's A&E Districts faced generally fall into categories such as staffing, administrative issues, marketing, funding/fundraising, socioeconomic conditions, infrastructure, affordability, community support, and "Other."
- Combined, the 1,335 events and 164 festivals attracted a combined 2.0 million attendees.
- Maryland's A&E Districts reported that there are 551 enterprises within their borders, including galleries/co-ops, performance venues, arts organizations, arts suppliers/services, arts education organizations, museums, and "other" enterprises. These attract an estimated attendance of nearly 4.2 million individuals.
- Maryland's A&E Districts reported that 178 works of public art are available for visitors to enjoy.



¹"Arts & Entertainment Districts,"
Maryland State Arts Council, accessed
April 29, 2020,

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

4

- Twelve districts reported that they have housing specifically for artists, with 797 total units available.
- Fourteen districts maintain artist registries and have 249 registered artists; overall, the 26 districts estimate that there are 5,918 artists working and creating within their boundaries.
- Businesses within the A&E Districts take advantage of the Admissions and Amusement Tax abatement, as well as property tax credits. Other incentives that districts reported include façade improvement, loans, grants, other tax abatements/credits, and non-financial incentives.
- Two districts received federal funding, totaling \$40,000.
- Twenty-five districts reported receiving funding from MSAC, totaling \$329,266.
- Other reported state funding came from the following sources:
 - o Maryland Main Street—\$36,500;
 - o Heritage Areas Authority/Planning—\$87,500;
 - o Capital Bond—\$300,000;
 - o The Maryland Film Office—\$1,000;
 - o The Department of Housing and Community Development—\$190,000; o
 - o The Maryland Department of Natural Resources—\$293,500;
 - o Baltimore Regional Neighborhood Initiative—\$150,000;
 - o Maryland Historic Trust—\$21,000;
 - o Maryland Humanities—\$10,000;
 - o Community Legacy Grants—\$50,000; and

- o Keep Maryland Beautiful—\$5,000.
 - Local funding awards, often from arts councils or municipalities, totaled \$467,609. ●
- Districts also received operational and in-kind support, valued at roughly \$1.1 million and \$565,236, respectively.
- Some of the overarching goals of the A&E Districts include the following:
 - o Expand public art and beautification projects.
 - o Foster more collaboration between artists and stakeholders.
 - o Diversify activities and events offered.
 - o Attract traffic from surrounding cities and states.
 - o Explore the benefits of expanding the boundaries of A&E districts.
 - o Increase marketing, branding, and awareness efforts, particularly online.
 - o Strengthen educational outreach.
 - o Ensure artists are maximizing available tax credits.
 - To achieve these goals, districts have developed work plans with actionable steps. ●
- Technical assistance that districts request from MSAC, excluding funding, are often related to networking, marketing, volunteer recruitment, and assistance with state tax processes.

2.0 Introduction

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.” Each A&E District has unique economic development goals and priorities, which can² 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 activities undertaken within these districts for the past fiscal year (FY).

MSAC sought an analysis of the data from the annual reports completed for FY 2019. The Regional Economic Studies Institute (RESI) of Towson University tabulated and analyzed this data to provide MSAC with a comprehensive survey analysis for FY 2019. The data captured in the analysis are self-reported by the individual A&E Districts; as such, some figures may be overestimated or underestimated.

Where applicable, the analysis presents data regarding the number and percentage of respondents for each answer choice for multiple-choice questions. In cases where questions were open ended, RESI reported which respondents replied with similar answers and/or

presented a sample of direct quotes collected.

3.0 Survey Analysis

Each of the 26 A&E Districts within Maryland during FY 2019 received and completed the annual report. MSAC provided these reports to RESI, who then collated and analyzed them. The sections below detail the results. Please note that totals may not sum due to rounding.

To view the annual report format and questions, please refer to Appendix A. For a description of limitations encountered within the annual report data provided, please refer to Appendix B.

3.1 FY 2019 Accomplishments

In the annual report, districts were asked to highlight various accomplishments during FY 2019, including:

- new capital projects initiated or completed during the fiscal year;
- new retailers, businesses, and restaurants that opened; and
- new organizations that located in the district.



²“Arts & Entertainment Districts,” Maryland State Arts Council, accessed April 29, 2020, <https://www.msac.org/programs/arts-entertainment-districts>.

Figure 1: New Entities by District, FY 2019

A&E District	New Capital Projects				New Retailers				New Businesses				New Restaurants				Number Percentage				Number Percentage			
	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage
Annapolis	5	2.3%	1	0.9%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	5	4.6%	6	6.1%	1	1.0%	8	7.3%	0	0.0%
Bethesda	2	0.9%	8	7.3%	11	11.1%	8	7.0%	5	4.6%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	7	6.4%	5	5.1%	3	3.0%
Bromo Tower	15	7.0%	5	4.6%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	7	6.4%	5	5.1%	3	3.0%
Cambridge	2	0.9%	7	6.4%	5	5.1%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%
Chestertown	6	2.8%	4	3.7%	0	0.0%	1	1.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%
Crisfield	0	0.0%	0	0.0%	0	0.0%	1	1.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%
Cumberland	28	13.1%	9	8.3%	8	8.1%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%
Denton	3	1.4%	2	1.8%	4	4.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Elkton	8	3.8%	4	3.7%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Frederick	15	7.0%	12	11.0%	9	9.1%	7	7.0%	7	7.0%	7	7.0%	7	7.0%	7	7.0%	7	7.0%	7	7.0%	7	7.0%	7	7.0%
Frostburg	7	3.3%	3	2.8%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%
Gateway	10	4.7%	5	4.6%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%
Grantsville	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Hagerstown	5	2.3%	1	0.9%	7	7.1%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%	4	4.0%
Havre de Grace	3	1.4%	12	11.0%	3	3.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%
Highlandtown	31	14.6%	4	3.7%	7	7.1%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%
Leonardtown	5	2.3%	5	4.6%	3	3.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%
Oakland	0	0.0%	2	1.8%	2	2.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%
Salisbury	12	5.6%	2	1.8%	7	7.1%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%	2	2.0%
Silver Spring	23	10.8%	3	2.8%	4	4.0%	10	10.0%	10	10.0%	10	10.0%	10	10.0%	10	10.0%	10	10.0%	10	10.0%	10	10.0%	10	10.0%
Snow Hill	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Station North	20	9.4%	1	0.9%	0	0.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%	3	3.0%
Stevensville	1	0.5%	3	2.8%	3	3.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Wheaton	7	3.3%	3	2.8%	7	7.1%	11	11.1%	11	11.1%	11	11.1%	11	11.1%	11	11.1%	11	11.1%	11	11.1%	11	11.1%	11	11.1%
Total	213	100.0%	109	100.0%	99	100.0%	75	100.0%	75	100.0%	75	100.0%	75	100.0%	75	100.0%	75	100.0%	75	100.0%	75	100.0%	75	100.0%

Sources: Maryland A&E Districts, MSAC, RESI



The A&E Districts reported a total of 213 new capital projects initiated or completed during FY 2019. These projects ranged in scope from new hotels to renovations for ADA [the Americans with Disabilities Act] compliance to a boat dock and a food truck pad. With 31 projects, Highlandtown had the highest number of new capital projects, making up 14.6 percent of the total. Cumberland had the next highest total, at 28, or 13.1 percent. Bel Air, Crisfield, Grantsville, and Oakland each reported having no new capital projects in FY 2019.

Maryland's A&E Districts reported that 109 new retailers opened within their borders in FY 2019. These encompass an array of retailers, including bookstores, pet stores, and stores selling locally produced goods. Frederick and Havre de Grace reported the largest number of new retailers, with 12 openings each (a combined 22.0 percent of the total) during the fiscal year. Cumberland reported the second-highest number, with 9 (or 8.3 percent). Crisfield, Grantsville, and Snow Hill reported that no new retailers opened within their districts during the same fiscal year.

Throughout FY 2019, 99 new businesses opened in Maryland's A&E Districts. These represent a wide range of businesses, including but not limited to wellness/fitness studios, barbershops, architecture firms, and an escape room. Bethesda, with 11 new businesses representing 11.1 percent of the total, had the largest number of new businesses. Cumberland and Frederick were not far behind, reporting that 8 and 9 new businesses opened up in their districts, respectively. Berlin, Chestertown, Grantsville, Snow Hill, and Station North reported no new businesses in FY 2019.

Maryland's A&E Districts reported 75 restaurant openings in FY 2019, ranging from small coffee shops and specialty chocolate shops, to full-service restaurants and bars and breweries. The plurality (38.7 percent of the total) of these restaurants opened in Montgomery County: 11 (14.7 percent of the total) in Wheaton, 10 (13.3 percent of the total) in Silver Spring, and 8 (10.7 percent of the total) in Bethesda. Seven districts—Annapolis, Berlin, Denton, Elkton, Grantsville, Snow Hill, and Stevensville—reported no new restaurant openings during FY 2019.

Of the 17 new organizations that Maryland's A&E Districts reported in FY 2019, three are in Bethesda. Crisfield, Frederick, Highlandtown, and Silver Spring reported two new organizations. Many of these 17 organizations are arts or human services non-profit organizations.

3.2 Closings

Districts were also asked about the number of closings that occurred within their boundaries during FY 2019. Information regarding retailers, businesses, restaurants, and organizations was included in the annual reports.




8

Figure 2: Closures by A&E District, FY 2019

A&E District	Retail			Businesses			Restaurants			m
	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage	Number	
Annapolis	2	4.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Bel Air	3	6.3%	3	7.1%	1	2.4%	0	0.0%	0	0.0%
Berlin	1	2.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Bethesda	4	8.3%	7	16.7%	10	23.8%	0	0.0%	4	9.5%
Bromo Tower	3	6.3%	2	4.8%	1	2.4%	0	0.0%	0	0.0%
Cambridge	3	6.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Chestertown	2	4.2%	0	0.0%	1	2.4%	0	0.0%	0	0.0%
Crisfield	0	0.0%	2	4.8%	3	7.1%	0	0.0%	0	0.0%
Cumberland	1	2.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Denton	1	2.1%	1	2.4%	1	2.4%	0	0.0%	0	0.0%
Elkton	1	2.1%	1	2.4%	0	0.0%	0	0.0%	0	0.0%
Frederick	5	10.4%	5	11.9%	4	9.5%	0	0.0%	0	0.0%
Frostburg	3	6.3%	3	7.1%	2	4.8%	0	0.0%	0	0.0%
Gateway	2	4.2%	0	0.0%	1	2.4%	0	0.0%	0	0.0%
Grantsville	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Hagerstown	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Havre de Grace	1	2.1%	2	4.8%	1	2.4%	0	0.0%	0	0.0%
Highlandtown	3	6.3%	5	11.9%	2	4.8%	0	0.0%	0	0.0%
Leonardtown	0	0.0%	1	2.4%	0	0.0%	0	0.0%	0	0.0%
Oakland	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Salisbury	1	2.1%	6	14.3%	1	2.4%	0	0.0%	0	0.0%
Silver Spring	1	2.1%	3	7.1%	7	16.7%	0	0.0%	0	0.0%
Snow Hill	4	8.3%	0	0.0%	1	2.4%	0	0.0%	0	0.0%
Station North	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Stevensville	1	2.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Wheaton	6	12.5%	1	2.4%	2	4.8%	0	0.0%	0	0.0%
Total	48	100.0%	42	100.0%	42	100.0%	0	0.0%	0	0.0%

Sources: Maryland A&E Districts, MSAC, RESI





A&E Districts reported 48 retail closures in FY 2019. With six retail closings, Wheaton reported the largest number, followed by Frederick, with five closures reported in FY 2019. Six districts—Crisfield, Grantsville, Hagerstown, Leonardtown, Oakland, and Station North—reported no retail closures.

In total, Maryland's A&E Districts reported 42 business closures in FY 2019. Seven closures, representing 16.7 percent of the total, occurred in Bethesda. Salisbury saw six closures, making up 14.3 percent of the total. Frederick and Highlandtown each reported five business closures, or 11.9 percent of the total.

Statewide, Maryland's A&E Districts reported a total of 42 restaurant closures in FY 2019. Bethesda reported ten restaurant closures, or 23.8 percent of the total, followed by Silver Spring, with seven closures, representing 16.7 percent of the total. Ten districts reported no restaurant closures in FY 2019.

In total, eight organizations closed or relocated out of Maryland's A&E Districts in FY 2019. Silver Spring reported three closures.

To understand further the dynamics of Maryland's A&E Districts, RESI considered the net changes in the numbers of retailers, businesses, restaurants, and organizations. In general, economic activity is growing within Maryland's A&E Districts, in terms of the number of establishments. As seen in Figure 3, Maryland's A&E Districts reported a net increase of 61 retailers, 57 businesses, 33 restaurants, and 9 organizations in FY 2019.

Figure 3: Net Changes in Retailers, Businesses, Restaurants, and Organizations by District, FY 2019

A&E District Retailers Businesses Restaurants Organizations																			
Annapolis	-1	1	0	-1	Bel Air	2	3	0	0	Berlin	7	0	0	0	Bethesda	4	4	-2	3
Bromo Tower	2	0	1	0	Cambridge	4	5	-1	0	Chestertown	2	0	0	0					
Crisfield	0	-1	1	2	Cumberland	8	8	3	0	Denton	1	3	-1	0	Elkton	3	0	0	1
Frederick	7	4	3	2	Frostburg	0	1	0	0	Gateway	3	4	3	1	Grantsville	0	0	0	0
Hagerstown	1	7	4	0	Havre de Grace	11	1	1	0	Highlandtown	1	2	1	1					
Leonardtown	5	2	2	0	Oakland	2	2	3	0	Salisbury	1	1	1	0	Silver Spring	2			
1	3	-1			Snow Hill	-4	0	-1	1	Station North	1	0	3	0	Stevensville	2	3	0	0
Wheaton	-3	6	9	0															
Total 61 57 33 9																			

Sources: Maryland A&E Districts, MSAC, RESI

In FY 2019, Havre de Grace saw the greatest net gain in retailers, with eleven additional stores added. Cumberland and Hagerstown experienced the largest increase in businesses, each netting at eight and seven, respectively. Hagerstown also reported a net gain of four restaurants. Bethesda reported the largest net increase in organizations, with three.

3.3 FY 2019 Challenges

Districts also provided narratives regarding the challenges that they faced during FY 2019. RESI categorized the information provided in these narratives based on previous years' groupings, as well as trends seen in the data. Figure 4 describes how many districts reported each type of challenge.



Figure 4: Number of Districts Reporting Challenges by Type of Challenge, FY 2019

Challenge Type			Number of Districts	Percent of Districts ³
Staffing	9	36.0%	Administrative issues	8 32.0%
Marketing/Awareness	7	28.0%	Funding Opportunities/Fundraising	7 28.0%
Socioeconomics	5	20.0%	Infrastructure	5 20.0%
Affordability	3	12.0%	Community Support	3 12.0%
Other	8	32.0%		

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 4, districts most commonly experienced issues related to staffing. Districts discussed staff turnover resulting in a loss of experience and knowledge. In addition, districts, particularly those in more rural areas, noted that staff often have multiple roles and competing priorities and/or work on a volunteer basis, which limits the time they can allocate to district work. Not surprisingly, many other top responses—administrative issues and funding opportunities/fundraising—are related to these staffing challenges.

In addition to the challenges that aligned with defined categories, eight districts discussed other challenges. Other challenges were related to inclement weather, being located off the beaten path, and a fire within a district.

3.4 District Events and Festivals During FY 2019

Districts provided information regarding events and festivals that took place during FY 2019. RESI received and then cleaned these data for analysis. Figure 5 contains tabulations of events and festivals for FY 2019. Please note that not all districts provided information for all categories; attendance estimates were not provided for some events and festivals. Where possible, RESI estimated attendance levels based on data from prior years. Furthermore, events or festivals that were reported but did not occur during FY 2019 were excluded from the tabulations.

³ Please note that this percentage is calculated out of the 25 districts that reported challenges in FY19. One district reported “n/a” when asked about challenges.

13



Figure 5: Events by District, FY 2019

A&E District	Event	s	Percent Attendance
Annapolis 17	1.3%	171,000	
Bel Air 49	3.7%	60,743	
Berlin 8	0.6%	4,950	
Bethesda 19	1.4%	11,100	
Bromo Tower 11	0.8%	5,500	
Cambridge 23	1.7%	2,326	
Chestertown 15	1.1%	16,665	
Crisfield 31	2.3%	19,064	
Cumberland 45	3.4%	5,742	
Denton 11	0.8%	1,850	
Elkton 17	1.3%	17,971	
Frederick 22	1.6%	253,050	
Frostburg 185	13.9%	14,408	
Gateway 97	7.3%	10,143	
Grantsville 17	1.3%	37,154	
Hagerstown 27	2.0%	203,370	
Havre de Grace			
24	1.8%	112,300	
Highlandtown 16	1.2%	1,278	
Leonardtwn 29	2.2%	15,450	
Oakland 44	3.3%	3,098	
Salisbury 37	2.8%	50,820	
Silver Spring 472	35.4%	105,148	
Snow Hill 7	0.5%	1,035	
Station North 49	3.7%	1,625	
Stevensville 11	0.8%	1,265	
Wheaton 52	3.9%	22,380	
Total 1,335	100.0%	1,149,435	

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 5, Maryland's A&E Districts reported hosting 1,335 events with an estimated attendance of just over 1.1 million in FY 2019. Silver Spring reported the largest number of events, with 472 over the course of the fiscal year. Frederick reported the highest attendance levels, with an estimated 253,050 visitors coming to its 22 events.

Districts also provided information regarding festivals held within their boundaries during FY 2019. As with events, all data are self-reported, and not all districts provided estimated attendance totals. Figure 6 shows information regarding festivals in FY 2019.



14



Figure 6: Festivals by District, FY 2019

A&E District	Festival	Percent Attendance
--------------	----------	--------------------

Annapolis	2	1.2%	61,000	Bel Air	6	3.7%	59,945	Berlin	5	3.0%	8,000	Bethesda	4	2.4%	75,000	Bromo Tower	2	1.2%	5,000	Cambridge	7	4.3%	7,475	Chestertown	5	3.0%	13,200	Crisfield	1	0.6%	N/A ⁴	Cumberland	5	3.0%	875	Denton	1	0.6%	8,000	Elkton	4	2.4%	3,693	Frederick	6	3.7%	22,000	Frostburg	7	4.3%	6,500	Gateway	6	3.7%	5,600	Grantsville	5	3.0%	16,250	Hagerstown	4	2.4%	12,600	Havre de	8	4.9%	22,000	Grace				Highlandtown	2	1.2%	6,933	Leonardtwn	7	4.3%	16,200	Oakland	11	6.7%	6,150	Salisbury	2	1.2%	68,500	Silver Spring	43	26.2%	127,050	Snow Hill	8	4.9%	4,436	Station North	9	5.5%	179,600	Stevensville	1	0.6%	1,500	Wheaton	3	1.8%	86,962
Total																																	164	100.0%	824,470																																																																								

Grace

Total 164 100.0% 824,470



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figures could be used for estimation purposes.

3.5 District Assets

Maryland's A&E Districts contain unique enterprises that attract visitors to the districts. These enterprises range in size and scope, from galleries for local artists to ballet schools and dance studios to concert venues to history museums. Figure 7 contains information regarding the number of enterprises by district.

Figure 7: Enterprises by District, FY 2019

A&E District	Enterprise	s	Percent Attendance
Annapolis	N/A	N/A	N/A
Bel Air	10	1.8%	9,228
Berlin	8	1.5%	59,000
Bethesda	22	4.0%	845,175
Bromo Tower	24	4.4%	189,000
Cambridge	9	1.6%	N/A
Chestertown	15	2.7%	34,110
Crisfield	6	1.1%	16,651
Cumberland	17	3.1%	57,650
Denton	8	1.5%	4,700
Elkton	17	3.1%	34,775
Frederick	52	9.4%	73,000
Frostburg	20	3.6%	259,810
Gateway	55	10.0%	1,063
Grantsville	11	2.0%	38,654
Hagerstown	9	1.6%	686,041
Havre de Grace		31	5.6% 152,050
Highlandtown	10	1.8%	64,910
Leonardtwn	17	3.1%	45,250
Oakland	17	3.1%	26,376
Salisbury	16	2.9%	66,525
Silver Spring	77	14.0%	1,479,750
Snow Hill	8	1.5%	34,980
Station North	39	7.1%	N/A
Stevensville	8	1.5%	7,035
Wheaton	45	8.2%	N/A
Total	551	100.0%	4,185,733

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 7, Maryland's A&E Districts are home to 551 enterprises. With 77 enterprises, Silver Spring reported the largest number, followed by Gateway, with 55. Silver Spring also



reported the highest number of visitors for its enterprises, at nearly 1.5 million attendees. Bethesda reported the second-highest estimated attendance, at more than 0.8 million.

Districts provided information regarding these enterprises, as well as estimated attendance levels. In cases where a district did not provide an enterprise type, RESI grouped the enterprise into one of the predefined categories. Figure 8 contains information regarding enterprises by type in Maryland's A&E Districts.

Figure 8: Enterprises by Type in Maryland's A&E Districts, FY 2019

Enterprise Type	Number	Percent	Attendance
Performance Venues	139	25.2%	1,952,684
Galleries/Co-ops	137	24.9%	284,397
Other	89	16.2%	1,664,011
Arts Organizations	73	13.2%	111,829
Museums	39	7.1%	104,280
Art Suppliers/Services	39	7.1%	52,115
Arts Education Organizations	35	6.4%	16,417
Total	551	100.0%	4,185,733

Sources: Maryland A&E Districts, MSAC, RESI

Maryland's A&E Districts contain 551 enterprises statewide. Performance venues are the most common type of enterprise, with 139 locations throughout the state. Performance venues also attracted the highest level of reported participants, with nearly 2.0 million in estimated attendance.

In addition to a variety of enterprises, Maryland's A&E Districts contain numerous public art works, including sculptures, murals, mosaics, themed lighting, and decorative crosswalks. Figure 9 contains information regarding the number of reported public art works by district in FY 2019.



Figure 9: Public Art by District, FY 2019

District Public Art

WorksPercent

Annapolis	0	0.0%
Bel Air	24	13.5%
Berlin	0	0.0%
Bethesda	0	0.0%
Bromo Tower	0	0.0%
Cambridge	5	2.8%
Chestertown	0	0.0%
Crisfield	0	0.0%
Cumberland	0	0.0%
Denton	0	0.0%
Elkton	6	3.4%
Frederick	15	8.4%
Frostburg	2	1.1%
Gateway	0	0.0%
Grantsville	1	0.6%
Hagerstown	0	0.0%
Havre de		
Grace	16	9.0%
Highlandtown	0	0.0%
Leonardtwn	5	2.8%
Oakland	3	1.7%
Salisbury	15	8.4%
Silver Spring	62	34.8%
Snow Hill	0	0.0%
Station North	2	1.1%
Stevensville	0	0.0%
Wheaton	22	12.4%
Total	178	100.0%

Sources: Maryland A&E Districts, MSAC, RESI

As seen above, Maryland's A&E Districts reported a total of 178 public artworks in 13 districts. Silver Spring reported the plurality, with 62 works. Bel Air reported the second-highest total, with 24 works of public art.

A&E Districts were also asked to provide information regarding any housing that is designed for or marketed to artists. Figure 10 illustrates which districts reported artist housing as well as the number of units available.





Figure 10: Artist Housing by District, FY 2019

District Artist Housing?	Number of Units
Annapolis	No N/A
Bel Air	No N/A
Berlin	No N/A
Bethesda	No N/A
Bromo Tower	Yes 108
Cambridge	No N/A
Chestertown	No N/A
Crisfield	No N/A
Cumberland	No N/A
Denton	Yes 1
Elkton	No N/A
Frederick	No N/A
Frostburg	No N/A
Gateway	Yes 100
Grantsville	Yes 2
Hagerstown	Yes 4
Havre de Grace	No N/A
Highlandtown	Yes 8
Leonardtwn	Yes 70
Oakland	No N/A
Salisbury	Yes 45
Silver Spring	Yes 232
Snow Hill	Yes 3
Station North	Yes 219
Stevensville	No N/A
Wheaton	Yes 5
Total	12 797

Sources: Maryland A&E Districts, MSAC, RESI

The majority of Maryland's A&E Districts, 12 out of 26, reported having housing available specifically for artists. Combined, these districts offer 797 units, the plurality of which are in districts that surround the Washington, D.C. metro area (100 in Gateway, 232 in Silver Spring, and five in Wheaton). With 232 available housing units, Silver Spring reported the largest number for a single district, followed by Station North, with 219.

As illustrated previously, A&E Districts contain a variety of enterprises and attractions. Figure 11 contains the occupancy rate for various types of real estate by district, as well as the average rate for districts that reported a positive occupancy rate. Please note that not every district has each type of real



Figure 11: Occupancy Rate by Type of Real Estate by District, FY 2019

A&E District	Storefront/				Commercial Residential				Industrial/				Manufacturing Mixed Use			
Annapolis	90.0%	98.0%	0.0%	90.0%	Bel Air	96.0%	99.0%	0.0%	96.0%	Berlin						
	100.0%	90.0%	90.0%	90.0%	Bethesda	95.0%	95.0%	0.0%	95.0%	Bromo Tower						
	97.0%	96.0%	0.0%	90.0%	Cambridge	1.0%	1.0%	1.0%	1.0%	Chestertown	90.0%					
	99.0%	100.0%	90.0%		Crisfield	50.0%	75.0%	80.0%	50.0%	Cumberland	65.0%					
	90.0%	90.0%	70.0%		Denton	100.0%	92.0%	0.0%	89.0%	Elkton	95.0%	90.0%	0.0%			
	95.0%	Frederick	97.0%	97.0%	97.0%	95.0%	Frostburg	85.0%	95.0%	0.0%	85.0%					
	Gateway	87.0%	100.0%	90.0%	86.0%	Grantsville	25.0%	70.0%	0.0%	5.0%						
	Hagerstown	72.0%	90.0%	100.0%	67.0%	Havre de Grace	90.0%	85.0%	0.0%	0.0%						
	Highlandtown	86.0%	98.0%	75.0%	95.0%	Leonardtwn	90.0%	90.0%	0.0%	95.0%						
	Oakland	35.0%	60.0%	0.0%	5.0%	Salisbury	92.0%	96.0%	0.0%	10.0%	Silver Spring					
	93.0%	96.0%	97.0%	91.0%	Snow Hill	65.0%	90.0%	0.0%	10.0%	Station North						
	65.0%	88.0%	75.0%	70.0%	Stevensville	98.0%	98.0%	0.0%	75.0%	Wheaton	97.0%					
	90.0%	0.0%	77.0%													

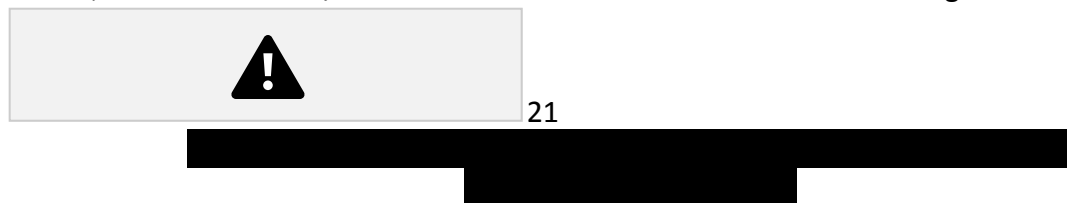
Sources: Maryland A&E Districts, MSAC, RESI

While all districts reported occupancy rates for storefront/commercial and residential real estate and nearly every district reported having mixed-use spaces, only eleven districts reported occupancy rates for industrial/manufacturing spaces. Berlin and Denton both reported a 100 percent occupancy rate for storefront/commercial spaces. Gateway indicated that its residential

real estate was fully occupied, while Chestertown and Hagerstown indicated that their industrial/manufacturing space was fully occupied. No districts reported that their mixed-use real estate was fully occupied in FY 2019.

3.6 Benefit Information

Benefits to A&E Districts include artist registries, artist relocation programs, tax abatement and credits, and social media/website features. Artists in A&E Districts are eligible for various



benefits. Fourteen of Maryland's A&E Districts reported a total of 249 artists on official registries. Figure 12 contains further information regarding registered artists at the district level in FY 2019. Please note that districts that do not maintain a registry are described with "0," and some districts reported having registries but reported that zero artists were registered.

Figure 12: Registered Artists by District, FY 2019

District Number in Registry

Annapolis	0
Bel Air	15
Berlin	15
Bethesda	0
Bromo Tower	0
Cambridge	0
Chestertown	0
Crisfield	35
Cumberland	0
Denton	6
Elkton	0
Frederick	30
Frostburg	15
Gateway	0
Grantsville	0
Hagerstown	0
Havre de Grace	0
Highlandtown	0
Leonardtwn	35
Oakland	88
Salisbury	0
Silver Spring	5
Snow Hill	0
Station North	0
Stevensville	0

Wheaton 5

Total 249

Sources: Maryland A&E Districts, MSAC, RESI

Regardless of whether or not a district maintains a registry, districts reported estimated numbers of artists working within their boundaries in FY 2019, described in Figure 13.

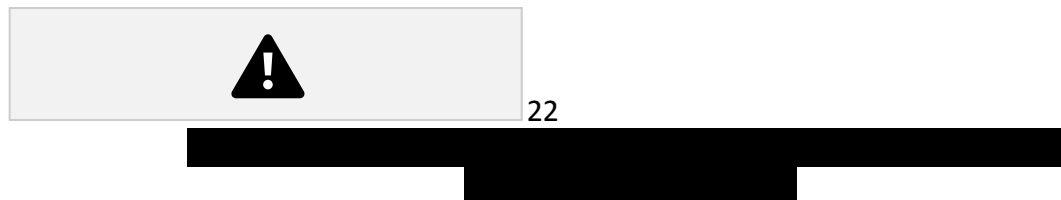


Figure 13: Estimated Artists by District, FY 2019

District Estimated Artists

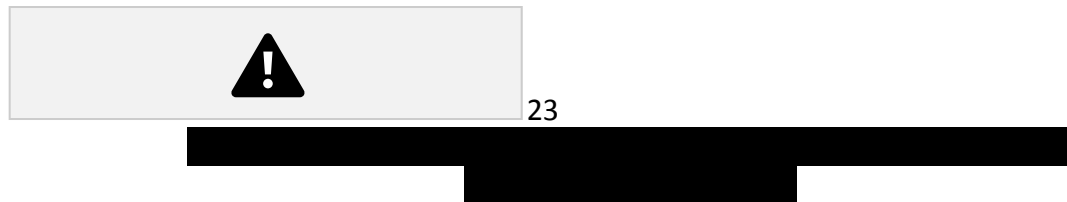
Annapolis 200
Bel Air 95
Berlin 65
Bethesda 1,000
Bromo Tower 271
Cambridge 0
Chestertown 7
Crisfield 114
Cumberland 15
Denton 240
Elkton 375
Frederick 250
Frostburg 450
Gateway 690
Grantsville 17
Hagerstown 300
Havre de Grace 50
Highlandtown 250
Leonardtoun 108
Oakland 5
Salisbury 85
Silver Spring 75
Snow Hill 16
Station North 1,000
Stevensville 150
Wheaton 90

Total 5,918

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 13, Maryland's A&E Districts have an estimated 5,918 artists creating within their boundaries. Bethesda and Station North reported the highest number of artists, with 1,000 artists each. In addition, Cumberland, Denton, and Wheaton reported having an artist relocation program during FY 2019.

Businesses in Maryland's A&E Districts have a variety of tax incentives available to them. These include abatement of the Admission and Amusement Tax, property tax credits for arts-related



renovations, as well as other tax incentives. Figure 14 displays the number of businesses by district that utilized tax incentives in FY 2019.

Figure 14: Businesses' Tax Incentive Utilization by District, FY 2019

District	Admissions and Amusement		Property Tax Credits	
	Tax Abatement			
	Number	Percent	Number	Percent

Annapolis	1	2.9%	0	0.0%	Bel Air	0	0.0%	0	0.0%	Berlin	0	0.0%	0	0.0%	Bethesda
2	5.7%	1	25.0%	Bromo Tower	3	8.6%	0	0.0%	Cambridge	0	0.0%	0	0.0%		
Chestertown	0	0.0%	0	0.0%	Crisfield	0	0.0%	0	0.0%	Cumberland	1	2.9%	1		
25.0%	Denton	0	0.0%	0	0.0%	Elkton	0	0.0%	0	0.0%	Frederick	11	31.4%	0	
0.0%	Frostburg	0	0.0%	0	0.0%	Gateway	3	8.6%	1	25.0%	Grantsville	1	2.9%	1	
25.0%	Hagerstown	2	5.7%	0	0.0%	Havre de Grace	0	0.0%	0	0.0%	Highlandtown	0			
0.0%	0	0.0%	Leonardtwn	2	5.7%	0	0.0%	Oakland	1	2.9%	0	0.0%	Salisbury	2	
5.7%	0	0.0%	Silver Spring	2	5.7%	0	0.0%	Snow Hill	0	0.0%	0	0.0%	Station North		
3	8.6%	0	0.0%	Stevensville	0	0.0%	0	0.0%	Wheaton	1	2.9%	0	0.0%		
Total 35 100.0% 4 100.0%															

Sources: Maryland A&E Districts, MSAC, RESI

As shown in Figure 14, 35 businesses in 14 districts utilized the Admissions and Amusement Tax abatement in FY 2019. The plurality of these businesses, 11 out of the 35 (or 31.4 percent),

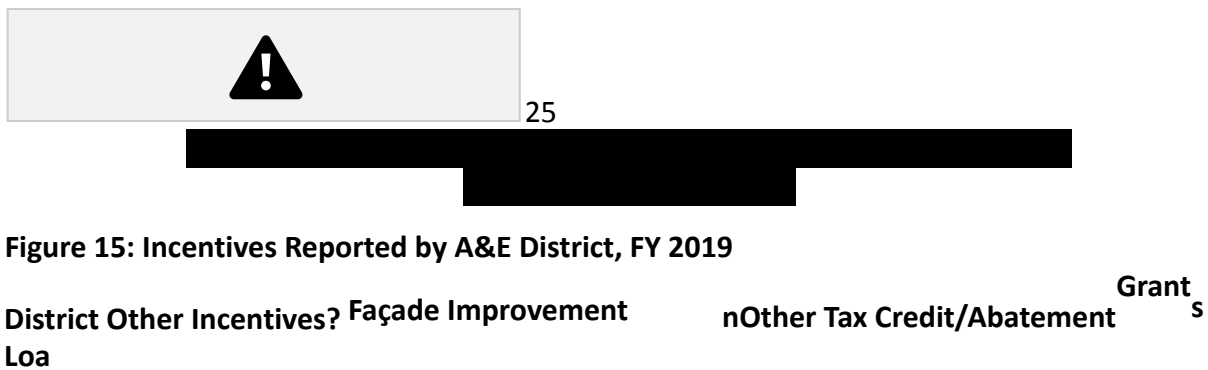
⁵ "A&E District Resources," Maryland State Arts Council, accessed April 29, 2020, <https://www.msac.org/node/62709>.



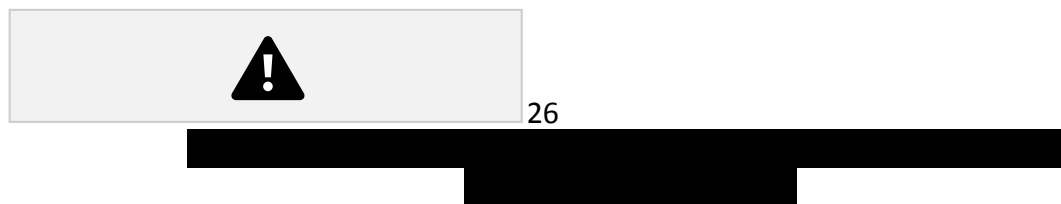
were in Frederick. Bromo Tower, Gateway, and Station North each had three businesses that utilized the tax incentive, which in total made up 25.8 percent. Four districts reported a total of four businesses that took advantage of property tax credits.

In addition to the Admissions and Amusement Tax abatement and property tax credits explicitly

included in the annual report, districts had the opportunity to highlight any other incentives available. RESI grouped these responses for the districts that reported additional incentives into the following categories: façade improvement assistance, loans, other tax credits or abatement, grants, other financial incentives, and non-financial incentives. Figure 15 provides information regarding these various incentives at the district level.



Annapolis No No No No No Bel Air Yes Yes Yes Yes No Berlin Yes Yes No No No Bethesda Yes No No No Yes
 Bromo Tower Yes No Yes Yes No Cambridge No No No No No Chestertown Yes Yes Yes Yes No Crisfield Yes Yes
 Yes Yes Yes Cumberland Yes No Yes Yes Yes Denton Yes No Yes No No Elkton Yes Yes Yes No No Frederick Yes No
 No Yes No Frostburg Yes No No Yes Yes Gateway Yes Yes No Yes No Grantsville Yes Yes No Yes Yes Hagerstown
 Yes No Yes Yes Yes Havre de Grace Yes Yes Yes Yes Yes Highlandtown Yes No Yes Yes No Leonardtown Yes No No
 No No Oakland Yes Yes No Yes Yes Salisbury Yes Yes Yes Yes No Silver Spring Yes No No Yes No Snow Hill Yes No
 Yes Yes No Station North Yes Yes Yes Yes No Stevensville No No No No No Wheaton Yes No No Yes No **Total 23**
11 13 18 9 Sources: Maryland A&E Districts, MSAC, RESI



As shown in Figure 15, most districts reported additional incentives. The most common type of additional incentive was another type of tax credit or abatement, available in 18 districts. In addition, 13 districts reported non-financial incentives, including demographic and economic analysis, marketing support, access to regional small business development centers, and free parking.

A&E Districts also have access to various social media outlets to communicate with their communities. Figure 16 contains information regarding which communication tools are most frequently used.

Figure 16: Use of Communication Tools, FY 2019

Tool	Numbe	Percentag
	r	e

Facebook	26	100.0%	Website	23
	88.5%		Events	Calendar
			21	80.8%
Instagram	15	57.7%	Artist Registry	13
	50.0%		Twitter	12
			46.2%	Other
			7	26.9%

Sources: Maryland A&E Districts, MSAC, RESI

All 26 of Maryland’s A&E Districts use Facebook. The next-most-common tool is a website, which 23 districts use. Instagram was utilized by 15 districts, gaining popularity in FY 2019.

3.7 Public Funding

A&E Districts reported public funding received from the federal, state (both from MSAC and other state agencies), and local levels. Some districts also received in-kind support. Figures 17 through 22 describe funding that districts reported by type and source.

Figure 17: A&E Districts Receiving Federal Funding, FY 2019
A&E

District	Federal Funding Type	Amount
Frederick	National Endowment for the Arts	\$10,000
Denton	USDA – Rural Business Development Grant	\$30,000
Total		\$40,000

Sources: Maryland A&E Districts, MSAC, RESI

In FY 2019, two districts—Denton and Frederick—reported receiving a total of \$40,000 in federal grants. The National Endowment for the Arts awarded a grant to Frederick, while Denton received funding from the United States Department of Agriculture (USDA).



Figure 18: A&E Districts Receiving Funding from MSAC, FY 2019

MSAC Funding Type	District	Amount
	Annapolis	\$10,000
	Berlin	\$10,000
A&E Grant	Bethesda	\$10,000
	Cambridge	\$10,000
	Chestertown	\$10,000
	Denton	\$11,000
	Bel Air	\$10,000

Bromo Tower \$10,000

Elkton \$10,000

Frostburg \$10,000

Gateway \$10,000

Operating Support Grantsville \$10,000 Highlandtown \$10,000

Oakland \$10,000

Salisbury \$10,000

Silver Spring \$10,000

Snow Hill \$10,000

Station North \$10,000

Wheaton \$10,000

Berlin \$1,850

Bromo Tower \$2,500

Crisfield \$2,500

Cumberland \$3,800

Denton \$3,800

Elkton \$2,500

Technical Assistance Grants for Frederick \$12,500 Frostburg \$2,500 Gateway \$2,500 Havre de Grace \$12,500 Leonardtown \$10,000 Salisbury \$1,750 Silver Spring \$2,500 Wheaton \$2,500

Organizations Gateway \$6,500 Chestertown \$5,000

Public Art

Denton \$6,386

Gateway \$5,000



Havre de Grace \$5,000

Leonardtown \$10,000

Salisbury \$5,000

Snow Hill \$3,425

Stevensville \$5,000

Wheaton \$5,000

Bethesda \$2,500

Crisfield \$2,000
 Creativity/Basic Silver Spring \$3,500
 Station North \$3,500
 Wheaton \$2,500
 Other/Unspecified Snow Hill \$3,091

Total \$329,266

Sources: Maryland A&E Districts, MSAC, RESI

Twenty-five districts reported receiving a combined total of \$329,266 from MSAC in FY 2019. The largest single grants awarded were technical assistance grants to Frederick and Havre de Grace, each valued at \$12,500. Technical assistance was the most common type of funding that districts received, with 14 districts reporting a combined total of \$63,700 in awards.

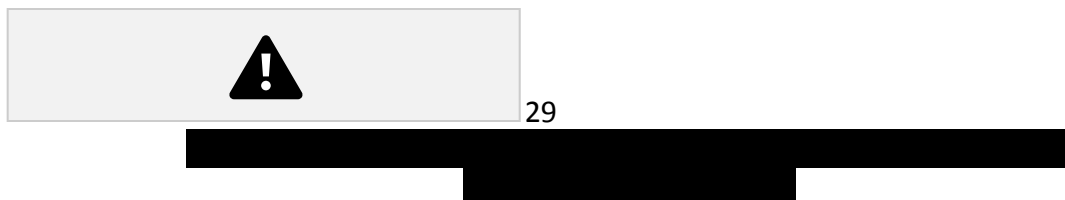


Figure 19: A&E Districts Receiving Other State Funding, FY 2019

State Funding Type	District	Amount
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Keep Maryland Beautiful Annapolis \$5,000 Main Street Denton \$25,000

Frostburg \$16,500

Heritage Areas Authority/Planning	Denton \$62,500	Gateway \$25,000
Capital Bond Gateway \$300,000	Other – Maryland Film Office Bel Air \$1,000	
	Highlandtown	
Other – DHCD		
	Leonardtowntown \$100,000	
	Highlandtown \$150,000	
Other – MD Department of Natural Resources		Leonardtowntown \$290,000
	Frederick \$3,500	
Other – Community Legacy Grant Gateway \$50,000	Other – MD Humanities Gateway \$10,000	
	Other – MHT Gateway \$21,000	Total \$846,000

Sources: Maryland A&E Districts, MSAC, RESI

Districts received a reported \$846,000 from state agencies other than MSAC in FY 2019. “Other” awards from seven different sources comprise the majority of this total; the Department of Housing and Community Development (DHCD) awarded \$100,000 to Leonardtown and \$90,000 to Highlandtown. Of the defined state funding sources, Maryland Main Street and Heritage Areas Authority/Planning were the most common, with four districts receiving a combined total of \$129,000.

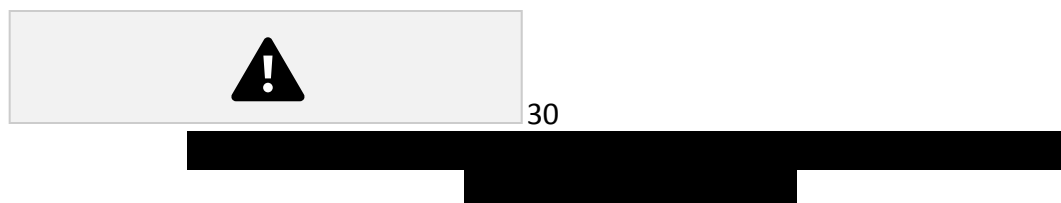


Figure 20: A&E Districts Receiving Local Funding, FY 2019

District Local Funding Type Amount

BGE \$10,000

Annapolis Foundation \$2,500
 Anne Arundel Arts Council \$2,500 Community
 Bel Air Harford County Cultural Arts Board \$3,000 Berlin Town of Berlin \$6,000 Denton
 Eastern Shore Heritage, Inc. \$2,500 Elkton Cecil County Arts Council \$500 Gateway HyCDC
 Mapping Racism \$10,000 Highlandtown Baltimore Development Corporation \$65,709
 Leonardtown St. Mary's Arts Council \$2,000 Private Funding – Public Art \$1,000
 Salisbury Sponsorship Income \$23,500 Community Foundation of the Eastern
 Shore \$2,500
 Silver Spring Montgomery County Government \$260,000 Snow Hill Worcester County Arts
 Council \$1,000 Abell Foundation \$5,000
 Johns Hopkins University \$4,000
 William Baker Memorial Fund \$17,500
 Station North Land Institute \$4,000 Baltimore Office of
 France-Merrick Foundation \$34,000 Urban Promotions \$10,400
Total \$467,609 Sources: Maryland A&E Districts, MSAC, RESI

Maryland's A&E Districts reported receiving a combined \$467,609 in local funding in FY 2019. Silver Spring received \$260,000 from the Montgomery County Government, which was both the largest single award and a plurality of the funds received by any single district. Station North reported the second-highest level of local funding, at \$74,900.

In addition to local funding, many districts receive operating support, as seen below.



Figure 21: A&E Districts Receiving Operating Support, FY 2019

District Provider Dollar Amount

Annapolis Inner West Street Association \$30,000 Bromo Tower Broadway Across America
 \$3,500 Frederick Ausherman Family Foundation \$252,000 Frostburg City of Frostburg \$2,500
 Allegany County \$7,000 Gateway PGCounty CDBG PY 45 Hyattsville CDC: Econ Dev \$100,000
 Grantsville Town of Grantsville \$3,000 City of Havre de Grace \$45,000
 Havre de Grace Harford County Tourism Grant \$22,500
 Harford County Cultural Arts Board \$7,000
 Leonardtown Commissioners of Leonardtown \$10,000 Oakland Town of Oakland \$7,000
 Salisbury City of Salisbury \$148,500 Silver Spring Montgomery County \$100,000 Station North
 AIM Bloomberg \$30,000 Stevensville Queen Anne's County Economic and Tourism
 Development \$3,700 Wheaton Montgomery County \$350,000 **Total**
\$1,121,700 Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 21, over \$1.1 million in operating support was awarded to 14 of Maryland's A&E Districts in FY 2019. Please note that this total is likely conservative, as not all districts reported dollar amounts for the operating support that they received. Of districts that reported funding amounts, Wheaton reported the single highest award, at \$350,000, followed by Frederick, at \$252,000.

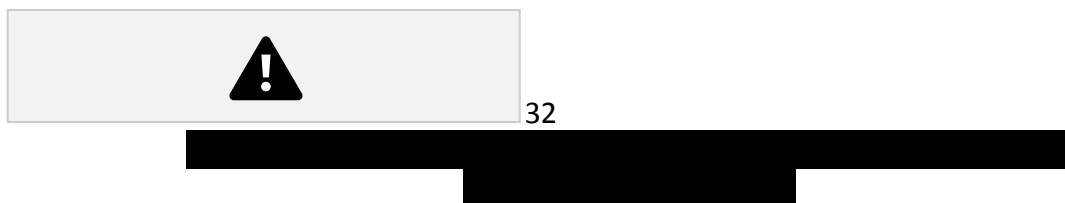


Figure 22: A&E Districts Receiving In-Kind Support, FY 2019

District Provider Type

Annapolis City of Annapolis Office Space Inner West Street Association Marketing and

	operating support	Town of Bel Air	Police and Public	
	Works Departments	Staff time for events		
Bel Air				
Town of Bel Air	Office space and services	Town Development	Staff salary, marketing, and web	
of Bel Air	Economic		hosting	
	Salt Water Media	Design work, web maintenance, and discounted printin		
Berlin			Town of Berlin	Office space
	and barricades	Baked Dessert Cafe and Gallery	Food and beverage for events	
Chestertown	Town of Chestertown	Staff salary and office space	Crisfield City of Crisfield	Corbin Studio &
	Gallery space, utilities, and insurance	Denton	Town of Denton	Administrative support
	Town of Denton	Office space		
Elkton	Margie Blystone	Volunteer time		
	Elkton Chamber and Alliance	Office Space		
Frederick	GenCo	Rent		
Frostburg	City of Frostburg	Office space and utilities		
Grantsville	Garrett County Arts Council	Administrative support and office space		
Havre de		support	City of Havre de Grace	
Grace		Tourism and PR	Creative Alliance	
Highlandtown		Staff time	Southeast CDC	Staff time
City of Havre de Grace	Staff			
		Staffing, grant and report writing, office supplies and sp		staffing
Leonardtown	Commissioners of Leonardtown			
	for events and festivals	Leonardtown Business Association	Volunteers and event funding	
Oakland	Garrett County Arts Council	Rental and cleaning waiver		
	Garrett County Arts Council	Administrative support and off space		
	WMDT 47 ABC	Advertising		
	City of Salisbury	Office Space and event support		
	PKS Certified Public Accountants	Accounting services		
Salisbury		Kacey Martin Graphic design	PAC-14	
Dicarlo	Digital Copy Center	Printing	Advertising and video services	Matice
Robinson's	Family of Businesses	Printing	Interactive Web hosting	
Silver Spring	Montgomery County Government	Office space	Queen	
	Anne's County	Economic		
Stevensville		administrative support	33	
and Tourism Development	Staff and			
	Nancy Cook – Chair	Administrative support		
	Joan MacWilliams – Secretary	Minutes		
Wheaton N/A	Office Space			
Total				

Sources: Maryland A&E Districts, MSAC, RESI



34

Districts also receive in-kind support from their communities, with an estimated value of \$565,236 in FY 2019. Please note that this total is a conservative estimate and likely understates the true impact of this support, since not all districts provided estimated values; furthermore, where districts provided funding ranges, RESI utilized the lower bound of the range. Values are rounded to the nearest dollar, so totals may not sum due to rounding. Types of in-kind support

range from office and administrative assistance to events management to marketing and advertising.

3.8 FY 2019 Goals and Work Plan

Some of the overarching and interrelated goals of the A&E Districts include the following:

- Expand public art and beautification projects;
- Foster more collaboration between artists and stakeholders;
- Diversify activities and events offered;
- Attract traffic from surrounding cities and states;
- Explore the benefits of expanding the boundaries of A&E districts;
- Increase marketing, branding, and awareness efforts, particularly online;
- Strengthen educational outreach; and
- Ensure artists are maximizing available tax credits.

To meet these goals, each district has a work plan. A sample of such work plans includes the following action steps:

- “Support local artists, art organizations and other providers of arts programming by gathering and disseminating resources, including grants, education and networking opportunities.”
- “The increase in operational funding assistance from MSAC will contribute significantly to staff resources and the development of new events and marketing strategies.” • “Utilize new branding & identity packages to implement marketing campaigns.” • “Hold public discussion forums; provide frequent events that will draw different age groups; and attract traffic from outside communities and states.”
- “Continue organizing A&E District workshops and organizing other District informational events.”
- “Engage an outside consultant in strategic planning for the A&E District: focus on goals and objectives for A&E District growth and sustainability as well as development of a marketing plan.”
- “We are building out an outreach schedule to leverage existing content generated in previous internships, while building relationships with district partners and organizations to help cross-promote their events.”

3.9 MSAC Technical Assistance

MSAC convenes the A&E Districts annually and offers them technical assistance. Figure 23 totals the types of technical assistance requested by districts.

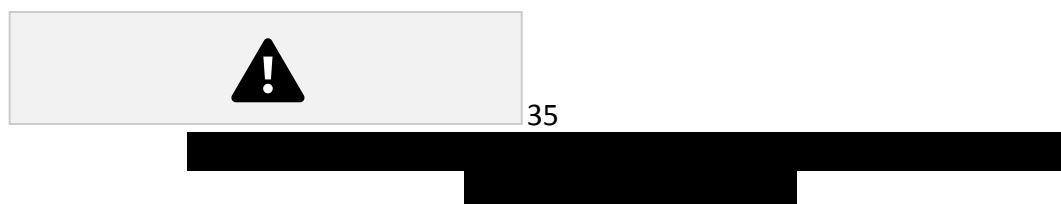


Figure 23: Technical Assistance Requested, FY 2019

Type of Assistance	Number	Percentage ⁶
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Networking w/ Other Districts	11	42.3%	Marketing	7	26.9%	Funding / Fundraising Opportunities	7	26.9%	Assistance With Tax Incentives for Stakeholders	5	19.2%	Volunteer Recruitment	2	19.2%	Other	15	7.7%
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Sources: Maryland A&E Districts, MSAC, RESI

Of the list provided, the A&E Districts would most like to see additional networking opportunities, with 11 districts indicating this would be a benefit. Within this category of assistance, nearly half of respondents specifically mentioned a desire to take organized trips to other A&E Districts throughout the state. The next most commonly requested assistance was tied between marketing and additional help with either accessing funding sources or raising funds themselves. Many of these requests align with the challenges presented in Section 3.3.

Many districts indicated some other type of assistance that would be helpful to their district. Overall themes include the following:

- Assisting stakeholders to understand and access tax benefits;
- Recruiting and engaging volunteers; and
- Success stories or case studies based on previous challenges faced by A&E Districts.

4.0 Conclusion

Maryland's A&E Districts hosted a variety of activity in FY 2019. In addition to 213 new capital projects that were initiated or completed, the districts statewide reported a net increase of 61 retailers, 57 businesses, 33 restaurants, and 9 organizations. The 1,335 events that took place within the districts' borders attracted an estimated 1.1 million attendees, while 164 festivals had an additional estimated 0.8 million in attendance. Enterprises such as galleries/co-ops, performance venues, museums, arts education groups, arts organizations, arts suppliers/services, and others encouraged nearly 4.2 million people to visit A&E Districts. Furthermore, districts reported that 178 works of public art were available for citizens to enjoy.

The majority of districts offer some type of housing for artists, with 797 units in total. Some districts maintain artist registries—249 registered in FY 2019. In total, Maryland's A&E Districts estimate that 5,918 artists work within their borders.

Statewide, 35 businesses within A&E Districts have taken advantage of the Admissions and Amusement Tax abatement program, while four businesses have utilized property tax credits. Other incentives that A&E Districts reported included façade improvement, loans, grants, other tax credits/abatement programs, and non-financial incentives.



⁶ The values shown are a percent of the 26 districts responding to the given question, not the total number of responses.

Districts use a variety of communication tools, most commonly Facebook and websites, to share information with their communities.

Maryland's 26 A&E Districts reported receiving public funding at the federal, state, and local levels, exceeding \$1.6 million. Districts also received operating support and in-kind support, conservatively valued at approximately \$1.1 million and \$565,236, respectively.

In general, district goals focus on expanding district offerings and strengthening community engagement. These goals include expanding public art and beautification projects; fostering more collaboration between artists and stakeholders; diversifying activities and events offered; attracting traffic from surrounding cities and states; exploring the benefits of expanding the boundaries of A&E districts; strengthening educational outreach; and ensuring artists are utilizing available tax credits. Districts have actionable work plans to help achieve these goals.

Outside of identifying funding opportunities, districts feel that marketing, networking with other districts, and assistance with finding additional funding or fundraising opportunities would be the most beneficial forms of technical assistance.

Maryland's A&E Districts provide cultural and creative opportunities throughout the state, enriching the lives of Maryland residents. In the process, these districts also support local economies and contribute to thriving communities.





5.0 References

“A&E District Resources.” Maryland State Arts Council. Accessed April 30, 2020. <https://www.msac.org/node/62709>.

“Arts and Entertainment Districts.” Maryland State Arts Council. Accessed April 30, 2020. <https://www.msac.org/programs/arts-entertainment-districts>.





Appendix A—A&E District Annual Report for FY 2019

[Placeholder for FY 2019 Annual Report]



39

Maryland's A&E Districts are expected to complete and provide annual reports to MSAC. These reports include questions regarding accomplishments, establishment openings and closings, challenges, events and festivals including estimated attendance figures, district enterprises, district assets and benefits, public funding, and goals/work plans to achieve those goals. MSAC also asks that districts provide information regarding technical assistance that they would like to receive. Districts submitted these reports to MSAC for FY 2019, which MSAC then provided to RESI for tabulation and analysis.

While each district received an identically formatted annual report template, districts interpreted questions differently and provided varying information and levels of detail. Furthermore, not all districts completed all questions. Additionally, for some open-ended questions, RESI re-categorized some responses to maintain consistency within the analysis. In other cases where data were not available, RESI estimated quantitative responses based on past years' analyses. For these reasons, these tabulations should be seen as an estimate; where necessary, RESI utilized conservative estimates.

END OF DOUCMENT

