

Maryland Arts and Entertainment Districts Impact Analysis FY 2013

Prepared for
Maryland State Arts Council

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1.0 Executive Summary

1.1 Overview

The Maryland State Arts Council (MSAC) sought a report detailing the economic and fiscal impacts of the 20 Maryland Arts and Entertainment Districts (A&E districts) in existence during the study period on Maryland's economy. As one of the first states to develop this designation, Maryland's A&E districts serve as a case study and leading example for other states. Other states have since created similar designations based on Maryland's example.

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

This analysis answers the following questions:

1. How many direct, indirect, and induced jobs have the districts created?
2. How much direct, indirect, and induced economic activity have the districts generated?
3. How much in tax revenues have the districts generated for the State of Maryland?

1.2 Summary of Findings

Below are RESI's key findings in regard to the economic and fiscal impacts of the A&E districts for FY 2013.¹

Economic Impacts

- The A&E districts' operations supported an estimated 5,144 direct, indirect, and induced jobs during the period.
 - Approximately 624 of these jobs were generated by new businesses formed within A&E districts' boundaries during the period.
 - The other 4,521 jobs were supported by visitor spending at events supported by the A&E districts during the period.
- More than \$458.2 million in total state GDP were supported by the A&E districts during the period.
 - Approximately \$48.5 million were generated by new businesses formed within A&E districts' boundaries during the period.
 - The other \$409.7 million were supported by visitor spending at events supported by the A&E districts during the period.
- Nearly \$149.2 million in total wages were supported by the A&E districts during the period.

¹ While this analysis takes into account as many variables as possible, it is important to note that a number of assumptions and exclusions were made as a result of missing data and other factors.

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- Approximately \$16.7 million were generated by new businesses formed within A&E districts' boundaries during the period.
- The other \$132.5 million were supported by visitor spending at events supported by the A&E districts during the period.

Fiscal Impacts

- New businesses formed within A&E districts' boundaries during the study period generated nearly \$4.2 million in tax revenues.²
- Visitor spending at events supported by the A&E districts supported more than \$32.1 million in tax revenues.
- The total tax revenue impact of the A&E districts came to approximately \$36.3 million during the study period.

² Total tax revenues refer to property, income, sales, payroll, and other tax revenues supported on the state and local levels.

2.0 Introduction

The Maryland State Arts Council (MSAC) sought a report detailing the economic and fiscal impacts of the 20 Maryland Arts and Entertainment Districts (A&E districts) in existence during the study period on Maryland's economy. As one of the first states to develop this designation, Maryland's A&E districts serve as a case study and leading example for other states.

To achieve the project objective, the Regional Economic Studies Institute (RESI) of Towson University estimated job creation, economic activity (also referred to as output or state GDP), and wages attributable to the A&E districts in 2013.³ These results were broken down by type of impact (direct, indirect, and induced). RESI also estimated the fiscal impacts associated with the program. Fiscal impacts were then compared against estimated tax revenue losses associated with the tax incentives available to and used by districts. The project team considered grants where applicable.

This analysis answers the following questions:

1. How many direct, indirect, and induced jobs have the districts created?
2. How much direct, indirect, and induced economic activity has the project generated?
3. How much in tax revenues have the districts generated for the State of Maryland?

To quantify the economic and fiscal impact of the project, RESI used the IMPLAN input/output model. For more information regarding IMPLAN, please refer to Appendix A.

3.0 Findings

3.1 Economic Impacts

According to RESI's analysis, the A&E districts collectively supported approximately 5,144 jobs and have generated more than \$458.2 million and nearly \$149.2 million in output and wages, respectively, during FY 2013 based on provided data. To determine the economic impacts, RESI used A&E district application materials and annual reports provided by MSAC. For a list of the annual report data provided, please refer to Appendix A. A summary of the total economic impacts generated by both new businesses and supported by visitor spending at events supported by the A&E districts can be found in Figure 1.

³ For definitions of terms, please refer to Appendix B.

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Figure 1: Economic Impact Summary⁴

District	Designation Year	Employment	Output	Wages
Annapolis	2008	26.5	\$3,158,359	\$1,067,707
Bel Air	2010	393.2	\$34,382,747	\$11,706,929
Berlin	2005	183.8	\$16,731,459	\$5,448,617
Bethesda	2002	575.8	\$50,430,050	\$16,326,609
Bromo Tower	2013	152.6	\$12,281,210	\$4,299,106
Cambridge	2003	169.7	\$15,074,449	\$4,900,150
Cumberland	2002	381.0	\$40,374,918	\$13,160,070
Denton	2005	32.9	\$2,864,129	\$925,438
Elkton	2006	63.6	\$5,959,332	\$1,977,406
Frederick	2003	933.3	\$83,211,809	\$27,075,103
Frostburg	2009	73.5	\$6,684,726	\$2,143,535
Gateway	2002	51.1	\$6,437,174	\$1,811,765
Hagerstown	2002	464.7	\$42,986,834	\$14,052,144
Havre de Grace	2008	116.1	\$10,377,143	\$3,367,896
Highlandtown	2003	93.2	\$8,483,858	\$2,679,608
Salisbury	2007	220.1	\$19,992,957	\$7,393,385
Silver Spring	2002	1,051.1	\$96,767,684	\$31,430,136
Snow Hill	2006	29.1	\$2,643,658	\$893,134
Station North	2002	366.2	\$32,500,663	\$10,495,524
Wheaton	2006	-233.1	-\$33,142,295	-\$11,963,045
Total		5,144.4	\$458,200,863	\$149,191,216

Sources: IMPLAN, RESI

The direct, indirect, induced, and total economic impacts broken out by source (new businesses and event spending) can be found in Figures 2 through 4. For information regarding RESI's methodology, please refer to Appendix A. Please note that direct employment figures associated with event spending throughout the report refer to the jobs supported by event attendees' spending money outside the event but within the A&E district for the duration of the event. For more information regarding RESI's assumptions, please refer to Section A.2 in Appendix A.

⁴ Summed figures throughout the report may not add up exactly to totals due to rounding.

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Figure 2: Total Employment Impacts

District	Direct	Indirect	Induced	Total
New Businesses				
Annapolis	-5.0	-0.2	0.6	-4.6
Bel Air	18.5	-1.4	4.0	21.1
Berlin	33.0	4.0	6.1	43.1
Bethesda	217.0	33.3	39.9	290.2
Bromo Tower	105.1	13.5	19.9	138.5
Cambridge	6.0	0.4	1.1	7.5
Cumberland	92.0	20.0	30.9	142.9
Denton	0.0	-0.1	0.0	-0.1
Elkton	-4.5	-0.5	-0.6	-5.6
Frederick	37.0	4.6	6.9	48.5
Frostburg	8.0	0.9	1.2	10.1
Gateway	-6.9	2.4	1.7	-2.8
Hagerstown	22.0	4.7	6.3	33.0
Havre de Grace	2.0	0.3	0.3	2.6
Highlandtown	-2.5	-0.5	-1.4	-4.4
Salisbury	42.0	6.8	13.0	61.8
Silver Spring	41.7	5.6	9.8	57.1
Snow Hill	9.0	1.6	2.3	12.9
Station North	29.0	5.0	6.7	40.7
Wheaton	-156.0	-41.1	-71.5	-268.6
Subtotal	487.4	59.3	77.2	623.9
Event Spending				
Annapolis	22.7	3.6	4.8	31.1
Bel Air	270.6	44.1	57.4	372.1
Berlin	101.7	16.8	22.2	140.7
Bethesda	208.7	33.5	43.4	285.6
Bromo Tower	10.3	1.7	2.1	14.1
Cambridge	118.4	19.3	24.5	162.2
Cumberland	172.1	28.5	37.5	238.1
Denton	24.2	4.0	4.8	33.0
Elkton	50.1	8.1	11.0	69.2
Frederick	644.9	106.1	133.8	884.8
Frostburg	45.8	7.6	10.0	63.4
Gateway	39.0	6.4	8.5	53.9
Hagerstown	312.7	51.5	67.5	431.7
Havre de Grace	82.8	13.6	17.1	113.5
Highlandtown	70.4	11.6	15.6	97.6
Salisbury	115.5	18.7	24.1	158.3
Silver Spring	720.8	117.4	155.8	994.0
Snow Hill	11.9	1.9	2.4	16.2
Station North	239.1	39.2	47.2	325.5
Wheaton	26.0	4.2	5.3	35.5
Subtotal	3287.7	537.8	695.0	4520.5
Total	3775.1	597.1	772.2	5144.4

Sources: IMPLAN, RESI

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Figure 3: Total Output Impacts

District	Direct	Indirect	Induced	Total
New Businesses				
Annapolis	\$169,374	\$26,400	\$80,580	\$276,353
Bel Air	\$3,110	-\$256,304	\$531,782	\$278,587
Berlin	\$2,249,760	\$631,345	\$820,287	\$3,701,392
Bethesda	\$14,778,834	\$4,749,859	\$5,337,414	\$24,866,107
Bromo Tower	\$6,470,580	\$1,904,585	\$2,657,041	\$11,032,206
Cambridge	\$364,236	\$75,356	\$149,854	\$589,446
Cumberland	\$11,391,160	\$2,916,944	\$4,139,525	\$18,447,629
Denton	\$7,796	-\$12,520	-\$2,303	-\$7,026
Elkton	-\$288,657	-\$99,837	-\$74,270	-\$462,764
Frederick	\$2,326,453	\$725,062	\$923,265	\$3,974,780
Frostburg	\$493,542	\$160,621	\$165,160	\$819,322
Gateway	\$1,075,118	\$178,160	\$229,418	\$1,482,697
Hagerstown	\$1,958,636	\$691,580	\$839,970	\$3,490,186
Havre de Grace	\$89,362	\$41,516	\$46,271	\$177,149
Highlandtown	-\$397,430	-\$77,737	-\$186,156	-\$661,323
Salisbury	\$3,404,223	\$865,812	\$1,745,053	\$6,015,087
Silver Spring	\$3,111,709	\$939,305	\$1,314,686	\$5,365,699
Snow Hill	\$710,078	\$203,215	\$306,060	\$1,219,353
Station North	\$2,476,679	\$817,496	\$891,349	\$4,185,524
Wheaton	-\$20,981,653	-\$5,738,196	-\$9,559,759	-\$36,279,608
Subtotal	\$29,412,909	\$8,742,660	\$10,355,229	\$48,510,798
Event Spending				
Annapolis	\$1,694,797	\$548,284	\$638,925	\$2,882,005
Bel Air	\$19,938,924	\$6,483,411	\$7,681,825	\$34,104,160
Berlin	\$7,611,504	\$2,451,106	\$2,967,458	\$13,030,067
Bethesda	\$14,898,529	\$4,863,566	\$5,801,848	\$25,563,942
Bromo Tower	\$726,087	\$239,050	\$283,868	\$1,249,005
Cambridge	\$8,428,445	\$2,778,903	\$3,277,655	\$14,485,003
Cumberland	\$12,789,547	\$4,125,441	\$5,012,301	\$21,927,289
Denton	\$1,666,816	\$563,558	\$640,782	\$2,871,155
Elkton	\$3,751,815	\$1,193,467	\$1,476,815	\$6,422,096
Frederick	\$46,110,804	\$15,222,407	\$17,903,817	\$79,237,028
Frostburg	\$3,425,216	\$1,101,821	\$1,338,367	\$5,865,404
Gateway	\$2,886,960	\$923,574	\$1,143,943	\$4,954,477
Hagerstown	\$23,024,553	\$7,442,277	\$9,029,817	\$39,496,648
Havre de Grace	\$5,944,403	\$1,965,447	\$2,290,145	\$10,199,994
Highlandtown	\$5,348,352	\$1,707,762	\$2,089,067	\$9,145,181
Salisbury	\$8,103,733	\$2,651,409	\$3,222,728	\$13,977,870
Silver Spring	\$53,372,081	\$17,176,144	\$20,853,759	\$91,401,984
Snow Hill	\$827,426	\$277,495	\$319,384	\$1,424,305
Station North	\$16,433,698	\$5,562,860	\$6,318,581	\$28,315,139
Wheaton	\$1,827,062	\$607,476	\$702,775	\$3,137,313
Subtotal	\$238,810,751	\$77,885,457	\$92,993,858	\$409,690,065
Total	\$268,223,660	\$86,628,117	\$103,349,087	\$458,200,863

Sources: IMPLAN, RESI

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Figure 4: Total Wage Impacts

District	Direct	Indirect	Induced	Total
New Businesses				
Annapolis	\$124,781	\$4,795	\$24,374	\$153,950
Bel Air	\$628,326	-\$70,350	\$160,915	\$718,891
Berlin	\$800,382	\$187,788	\$248,189	\$1,236,358
Bethesda	\$4,977,931	\$1,448,122	\$1,614,907	\$8,040,960
Bromo Tower	\$2,503,305	\$584,972	\$803,947	\$3,892,224
Cambridge	\$145,777	\$21,060	\$45,343	\$212,180
Cumberland	\$3,913,096	\$896,839	\$1,252,506	\$6,062,441
Denton	-\$2,809	-\$3,769	-\$696	-\$7,274
Elkton	-\$60,149	-\$26,295	-\$22,472	-\$108,915
Frederick	\$877,142	\$210,204	\$279,351	\$1,366,696
Frostburg	\$154,634	\$44,582	\$49,971	\$249,188
Gateway	\$46,188	\$83,382	\$69,445	\$199,015
Hagerstown	\$783,560	\$236,572	\$254,142	\$1,274,274
Havre de Grace	\$40,861	\$13,189	\$14,000	\$68,051
Highlandtown	-\$192,972	-\$28,518	-\$56,325	-\$277,815
Salisbury	\$2,029,182	\$286,363	\$527,944	\$2,843,489
Silver Spring	\$1,341,796	\$270,116	\$397,770	\$2,009,682
Snow Hill	\$271,884	\$66,086	\$92,609	\$430,579
Station North	\$776,157	\$251,037	\$269,699	\$1,296,893
Wheaton	-\$8,201,381	-\$1,879,269	-\$2,892,734	-\$12,973,384
Subtotal	\$10,957,693	\$2,596,905	\$3,132,884	\$16,687,482
Event Spending				
Annapolis	\$553,629	\$166,802	\$193,326	\$913,757
Bel Air	\$6,659,498	\$2,004,177	\$2,324,363	\$10,988,038
Berlin	\$2,550,238	\$764,123	\$897,899	\$4,212,259
Bethesda	\$5,028,803	\$1,501,323	\$1,755,523	\$8,285,649
Bromo Tower	\$247,011	\$73,979	\$85,892	\$406,883
Cambridge	\$2,835,554	\$860,665	\$991,751	\$4,687,970
Cumberland	\$4,291,709	\$1,289,286	\$1,516,635	\$7,097,629
Denton	\$564,817	\$174,010	\$193,884	\$932,711
Elkton	\$1,267,679	\$371,783	\$446,859	\$2,086,321
Frederick	\$15,562,978	\$4,728,121	\$5,417,308	\$25,708,407
Frostburg	\$1,146,080	\$343,302	\$404,967	\$1,894,348
Gateway	\$977,447	\$289,165	\$346,139	\$1,612,750
Hagerstown	\$7,724,489	\$2,321,115	\$2,732,267	\$12,777,870
Havre de Grace	\$1,998,550	\$608,350	\$692,946	\$3,299,845
Highlandtown	\$1,792,233	\$533,074	\$632,115	\$2,957,422
Salisbury	\$2,750,235	\$824,516	\$975,144	\$4,549,896
Silver Spring	\$17,781,863	\$5,328,585	\$6,310,006	\$29,420,454
Snow Hill	\$280,177	\$85,741	\$96,638	\$462,555
Station North	\$5,569,046	\$1,717,746	\$1,911,839	\$9,198,631
Wheaton	\$610,805	\$186,889	\$212,644	\$1,010,339
Subtotal	\$80,192,840	\$24,172,750	\$28,138,144	\$132,503,734
Total	\$91,150,533	\$26,769,655	\$31,271,028	\$149,191,216

Sources: IMPLAN, RESI

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Previous studies have yielded results comparable to RESI's findings. For a summary of results from past impact analyses, please refer to Section 4.0.⁵

3.2 Fiscal Impacts

RESI also estimated the fiscal impacts associated with the A&E districts. The fiscal impacts of the A&E districts can be found in Figure 5. Input data were provided in application materials and annual reports provided by MSAC.

Fiscal impacts—specifically, property tax revenues—would traditionally be compared against estimated tax revenue losses associated with the property tax incentives available to and used by A&E districts. Data from the A&E district annual reports did indicate that 14 properties submitted applications for the tax incentive, but neither the annual reports nor information from the State Department of Assessments and Taxation indicated that any of these applications were approved. As a result, RESI omitted this consideration for the analysis. For more information regarding RESI's reasoning, please refer to Appendix A.

⁵ Data may not available for every report and every category of interest as impact analyses vary in terms of objective and methodology.

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Figure 5: Total Fiscal Impacts

District	Tax Revenue Type					Total
	Property	Income	Sales	Payroll	Other	
New Businesses						
Annapolis	\$80,521	\$33,847	\$75,011	\$996	\$38,974	\$229,349
Bel Air	\$50,829	\$28,753	\$47,265	\$784	\$18,993	\$146,624
Berlin	\$78,230	\$43,333	\$72,756	\$1,348	\$42,467	\$238,134
Bethesda	\$598,434	\$281,661	\$557,137	\$8,769	\$311,204	\$1,757,205
Bromo Tower	\$295,813	\$140,719	\$275,382	\$4,245	\$148,767	\$864,926
Cambridge	\$16,924	\$7,961	\$15,756	\$231	\$8,446	\$49,318
Cumberland	\$355,242	\$218,937	\$330,132	\$6,611	\$209,946	\$1,120,868
Denton	-\$1,169	-\$111	-\$1,094	-\$8	-\$287	-\$2,669
Elkton	-\$4,114	-\$3,933	-\$3,807	-\$119	-\$2,998	-\$14,971
Frederick	\$114,100	\$48,863	\$106,282	\$1,491	\$54,984	\$325,720
Frostburg	\$17,302	\$8,730	\$16,101	\$272	\$9,038	\$51,443
Gateway	-\$68,123	\$12,416	-\$63,933	\$217	-\$13,607	-\$133,030
Hagerstown	\$56,662	\$44,395	\$52,548	\$1,389	\$35,185	\$190,179
Havre de Grace	\$10,384	\$2,448	\$9,696	\$74	\$4,214	\$26,816
Highlandtown	-\$4,694	-\$9,838	-\$4,282	-\$303	-\$5,081	-\$24,198
Salisbury	\$102,978	\$91,699	\$95,375	\$3,101	\$65,288	\$358,441
Silver Spring	\$177,790	\$69,429	\$165,685	\$2,191	\$82,806	\$497,901
Snow Hill	\$32,286	\$16,259	\$30,045	\$469	\$16,603	\$95,662
Station North	\$129,156	\$47,185	\$120,400	\$1,414	\$60,374	\$358,529
Wheaton	-\$544,913	-\$508,451	-\$504,411	-\$14,148	-\$365,620	-\$1,937,543
Subtotal	\$1,493,638	\$574,302	\$1,392,044	\$19,024	\$719,696	\$4,198,704
Event Spending						
Annapolis	\$80,521	\$33,847	\$75,011	\$996	\$38,974	\$229,349
Bel Air	\$945,445	\$406,506	\$880,643	\$11,983	\$459,639	\$2,704,216
Berlin	\$358,691	\$157,051	\$334,074	\$4,594	\$175,047	\$1,029,457
Bethesda	\$709,917	\$307,099	\$661,237	\$9,036	\$345,403	\$2,032,692
Bromo Tower	\$34,644	\$15,018	\$32,268	\$444	\$16,864	\$99,238
Cambridge	\$392,149	\$173,421	\$365,215	\$5,113	\$192,143	\$1,128,041
Cumberland	\$591,733	\$265,269	\$551,050	\$7,741	\$290,673	\$1,706,466
Denton	\$78,028	\$33,857	\$72,676	\$1,017	\$38,093	\$223,671
Elkton	\$183,371	\$78,208	\$170,810	\$2,276	\$88,679	\$523,344
Frederick	\$2,152,370	\$946,760	\$2,004,598	\$28,036	\$1,053,103	\$6,184,867
Frostburg	\$161,987	\$70,857	\$150,870	\$2,066	\$79,011	\$464,791
Gateway	\$136,079	\$60,562	\$126,727	\$1,758	\$66,605	\$391,731
Hagerstown	\$1,063,268	\$477,985	\$990,150	\$13,935	\$522,744	\$3,068,082
Havre de Grace	\$280,369	\$121,100	\$261,145	\$3,599	\$136,559	\$802,772
Highlandtown	\$255,315	\$110,586	\$237,806	\$3,225	\$124,142	\$731,074
Salisbury	\$379,163	\$170,685	\$353,086	\$4,962	\$186,291	\$1,094,187
Silver Spring	\$2,487,387	\$1,104,627	\$2,316,494	\$32,084	\$1,218,786	\$7,159,378
Snow Hill	\$38,702	\$16,882	\$36,047	\$505	\$18,909	\$111,045
Station North	\$766,408	\$333,848	\$713,827	\$10,032	\$374,594	\$2,198,709
Wheaton	\$84,010	\$37,181	\$78,239	\$1,101	\$41,234	\$241,765
Subtotal	\$11,179,557	\$4,921,349	\$10,411,973	\$144,503	\$5,467,493	\$32,124,875
Total	\$12,673,195	\$5,495,651	\$11,804,017	\$163,527	\$6,187,189	\$36,323,579

Sources: IMPLAN, RESI

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4.0 Literature Review

RESI analyzed findings from similar studies conducted for comparable programs and/or designations. Across the nation, there has been an increased interest in establishing arts, culture, and entertainment districts. According to the National Assembly of State Arts Agencies, twelve states had “established 156 unique cultural districts across the country” as of 2012.⁶ In addition to Maryland, Arkansas, Colorado, Indiana, Iowa, Kentucky, Louisiana, Massachusetts, New Mexico, Rhode Island, Texas, and West Virginia have cultural or similar district designations.⁷

Despite an increase in designations, research regarding the impacts of such designations is limited. While the National Assembly of State Arts Agencies identified more than 100 districts as of 2012, many districts have not yet estimated their economic impacts on their region. In many cases, the districts in other states are so new that it would be very challenging to estimate the impacts they will have on the surrounding economy. For example, some states, such as North Carolina, established cultural districts as recently as 2012.⁸

Americans for the Arts, a nonprofit organization, focuses on promoting and advancing the arts in the United States.⁹ In recent years, American for the Arts has performed extensive research into the economic impacts of the nonprofit arts and culture industry on both individual states and the United States as a whole.¹⁰ Most recently, in 2012, Americans for the Arts released the *Arts & Economic Prosperity IV* summary report, the fourth in its series.¹¹ This report details the economic and fiscal impacts of the nonprofit arts and cultural industry in 2010 at a national, state, and, in some cases, regional level.

Nationally, the 2010 economic impact of the nonprofit arts and culture industry was determined to have generated \$135.2 billion in total direct expenditures, supported 4.1 million full-time equivalent jobs, and to have generated \$86.7 billion in resident household income, \$12.7 billion in local and state government income, and \$9.6 billion in federal tax revenue.¹² In addition to the national impacts reported, vast impacts of the nonprofit arts and culture industry occurred at the statewide level.¹³ RESI compiled statewide impacts for comparison purposes. A summary of these impacts can be found in Figure 6.

⁶ National Assembly of State Arts Agencies, “State Policy Briefs: Tools for Arts Decision Making,” 1.

⁷ National Assembly of State Arts Agencies, “State Arts Agency Creative Economy Initiates.”

⁸ Ibid.

⁹ Americans for the Arts, “About Americans for the Arts.”

¹⁰ Americans for the Arts, “Reports and Data.”

¹¹ Americans for the Arts, “Arts & Economic Prosperity IV: The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences Summary Report.”

¹² Ibid, 3.

¹³ Ibid, B33.

Sources presented in the literature review mainly reported employment and other impact figures. RESI generally reports employment, state GDP, and wage impact figures. For more information regarding IMPLAN and its output, please refer to Appendix A.

Figure 6: Summary of Similar Studies

State	Industry Expenditures ¹⁴	Employment	Wages	State and Local Revenue
Connecticut	\$652,960,811	18,314	\$462,526,000	\$59,076,000
Delaware	\$142,329,627	3,868	\$112,337,000	\$9,939,000
Hawaii	\$159,605,567	4,426	\$126,504,000	\$17,494,000
Illinois	\$2,752,725,266	78,455	\$2,282,701,000	\$323,561,000
Nebraska	\$174,389,532	6,473	\$157,868,000	\$18,753,000
New Hampshire	\$115,082,228	3,493	\$79,531,000	\$11,606,000
North Carolina	\$1,242,874,488	43,605	\$946,707,000	\$119,005,000
Pennsylvania	\$2,545,382,269	81,061	\$1,934,659,000	\$360,015,000
South Dakota	\$96,660,370	2,989	\$66,645,000	\$7,854,000
Wisconsin	\$535,168,486	22,872	\$479,464,000	\$64,922,000

Source: *Arts & Economic Prosperity IV*

Even more impressive than the vast national impacts of the nonprofit arts and cultural industry are the impacts the industry has on individual regions and states—impacts that may not be seen if not for the arts and cultural industry. Illinois and Pennsylvania, for example, reported that the nonprofit arts and cultural industry had nearly \$3.0 billion in industry expenditures.¹⁵ These expenditures translated into approximately 80,000 full-time equivalent jobs and \$2.0 billion in wages for each state.¹⁶ For Illinois, expenditures generated more than \$0.3 billion in state and local tax revenues; in Pennsylvania, expenditures generated nearly \$0.4 billion in state and local tax revenues.¹⁷ With more than \$1.2 billion in expenditures, North Carolina also exhibited substantial impacts—nearly 44,000 full-time equivalent jobs, more than \$0.9 billion in wages, and approximately \$0.1 billion in state and local tax revenues.¹⁸

The widespread popularity and success of A&E or cultural district designation programs is apparent when considering the number of districts that have been designated in recent years. In addition, a number of cities have plans to designate districts in the future or are currently developing districts. Another promising factor for the future of A&E districts is the growing number of cities creating artist space within city limits. According to ArtistLink, many cities are

¹⁴ Expenditures include the spending of both organizations as well as audiences.

¹⁵ Americans for the Arts, “Arts & Economic Prosperity IV: The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences Summary Report,” May 14, 2012, B33.

¹⁶ Ibid.

¹⁷ Ibid.

¹⁸ Ibid.

working toward maintaining a space specifically for the use of artists and creative businesses.¹⁹ In 2003 Kansas City began its Urban Culture project to provide affordable housing, studio space, and exhibition spaces to artists.²⁰ In 2007 Santa Monica developed a plan, referred to as Creative Capital, to create more affordable artist space.²¹ In Paducah, Kentucky, financial incentives to artists nationwide are now being offered to encourage relocation to the Lower Town neighborhood.²²

At present, initial reported figures regarding impacts associated with arts, culture, and entertainment industries and designated districts may not be as specific and in depth as needed to compare directly to RESI's analysis. For example, *Arts and Economic Prosperity IV* considered only the direct industry expenditures to determine the economic impacts, whereas RESI considers event-related spending and business openings and closings when determining the economic impacts. While there are limitations associated with comparing this research with RESI's findings, it can serve as a starting point for consideration. As more and more A&E districts and similar designations are created, more research and analysis will be completed in regard to the specific economic impacts associated with such designations and/or programs.

5.0 Conclusion

The existence of cultural districts has a positive impact on the local economy. In the case of Maryland's A&E districts, operations supported an estimated total of 5,144 jobs during FY 2013. Approximately 624 of these jobs were generated by new businesses; the remaining 4,521 jobs were supported by visitor spending at events. In addition, more than \$458.2 million in total state GDP were supported by the A&E districts during the period—\$48.5 million by new businesses and \$409.7 million by visitor spending. Moreover, total wages of nearly \$149.2 million were supported by the A&E districts during the period. Approximately \$16.7 million in wages were generated by new businesses and \$132.5 million were supported by visitor spending at events.

New businesses formed within the A&E districts' boundaries during the study period generated nearly \$4.2 million in state and local tax revenues.²³ Visitor spending at events supported by the A&E districts supported more than \$32.1 million in state and local tax revenues. The total tax revenue impact of the A&E districts came to approximately \$36.3 million during the study period. As a result of approved property tax incentive applications, the total net property tax revenue for the average A&E district property would be less than the estimated generated property taxes provided when exemptions are taken into consideration.

¹⁹ Artist Link, "What Cities Are Doing for Artist Space."

²⁰ Artist Link, "Kansas City."

²¹ Artist Link, "Santa Monica."

²² Artist Link, "Paducah."

²³ Total tax revenues refer to property, income, sales, payroll, and other tax revenues supported on the state and local level.

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Appendix A—Methodology

A.1 IMPLAN Model Overview

To quantify the economic and fiscal impacts of the A&E districts on Maryland, RESI utilized the IMPLAN input/output model. This model enumerates the employment and fiscal impact of each dollar earned and spent by the following: employees of 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 of the event's employees, other vendors' employees, and other businesses' employees.

Economists measure three types of economic impacts: direct, indirect, and induced impacts. The direct economic effects are generated as the event creates jobs and hires workers to support the event's activities. The indirect economic impacts occur as the vendors purchase goods and services from other firms. In either case the increases in employment generate an increase in household income, as new job opportunities are created and income levels rise. This drives the induced economic impacts that result from households increasing their purchases at local businesses.

Consider the following example. A new firm opens in a region and directly employs 100 workers. The firm purchases supplies, both from outside the region as well as from local suppliers, which leads to increased business for local firms, thereby hypothetically creating jobs for another 100 workers. This is called the indirect effect. The workers at the firm and at suppliers spend their income mostly in the local area, hypothetically creating jobs for another 50 workers. This is the induced effect. The direct, indirect and induced effects add up to 250 jobs created from the original 100 jobs. Thus, in terms of employment, the total economic impact of the firm in our example is 250.²⁴

A.2 Input Assumptions

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

Economic impacts were determined based on two main factors: (1) estimated new direct employment occurring after A&E district designation as the attraction of new firms could primarily be attributed to the designation and (2) estimated spending at events for which attendance was provided. For the most part, this information was provided by the A&E districts. However, in some cases, the data were not provided in the annual reports. RESI researched figures for square footage per employee and spending for different event types from past studies to estimate these inputs.

²⁴ Total economic impact is defined as the sum of direct, indirect, and induced effects.

In cases of missing building data, RESI used proxy estimators in regard to size of businesses and commercial real estate based on application data. Historical buildings at times may be exempt from zoning restrictions due to size or being “grandfathered” into clauses in current legislation. The project team used average square footage as some businesses have a larger space than those that have originated in the last 20 to 30 years. The project team then used these square footage estimates and applied them to research regarding average square footage per employee to determine estimated direct employment where the data were not provided. Square footage, when reported by A&E districts, refers to the enclosed square footage of the buildings in the A&E districts. In cases where square footage was not reported, gross square footage was calculated from property records. Using FAR (Floor Area Ratio) estimates based on the population of an area, the project team calculated the maximum enclosed square footage possible. Enclosed square footage for districts missing this data was defined as gross square footage multiplied by FAR estimates.²⁵

To determine event spending inputs, RESI researched comparable events and the associated visitor spending figures and attendance to determine percentage spending levels for hotels, transportation, food and beverage, retail, entertainment, and other spending. Where districts did not provide attendance levels for events, attendance was estimated. In these cases, event attendance was estimated based on average attendance for similar events. A summary of the findings from RESI’s literature review can be found in Figure 7.

²⁵ Nelson, Arthur C. *Planner’s Estimating Guide: Projecting Land-use and Facility Needs*. Chicago: American Planning Association, 2004. Print.

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Figure 7: Event Spending Data Summary²⁶

Events	Hotels	Transportation	Food and Beverage	Retail	Entertainment	Other	Total Spending	Total Attendance
Community								
2011 Family Gras Weekend in Jefferson Parish (LA)	\$892,516	\$91,708	\$2,741,058	\$656,871	\$2,191,123	N/A	\$6,573,276	85,000
2010 Robbers Cave Fall Festival (OK)	\$152,600	\$536,300	\$505,400	\$1,083,600	\$123,200	\$35,000	\$2,436,100	70,000
2010 Market Street Festival in Ocean Springs (MD)	\$2,182,532	\$6,003,997	\$2,388,666	\$1,899,124	\$2,309,157	N/A	\$14,783,475	34,000
2000 Portland Rose Festival (OR)	\$5,100,000	\$10,900,000	\$10,600,000	\$7,600,000	\$6,200,000	N/A	\$40,400,000	1,923,964
Average	\$19.88	\$55.39	\$24.35	\$17.57	\$24.67	\$0.50		
Culture								
2011 Bayou Boogaloo Festival (LA)	\$150,413	\$47,070	\$285,080	\$62,808	\$197,934	N/A	\$743,305	27,000
2010 Nanticoke Pow Wow (DE)	\$57,800	\$53,800	\$290,600	\$76,400	N/A	\$52,800	\$531,400	20,000
2009 Mardi Gras (LA)	\$19,228,956	\$17,865,709	\$78,279,071	\$12,699,721	N/A	\$17,650,459	\$145,723,918	700,000
2009 Albuquerque Balloon Fiesta (NM)	\$36,679,120	\$23,272,837	\$21,731,943	\$11,745,796	10638712	\$2,082,327	\$106,150,735	761,864
Average	\$21.02	\$41.87	\$13.20	\$11.34	\$10.65	\$10.20		
Film								
2011 Sundance Film Festival (UT)	\$25,825,453	\$3,815,513	\$16,478,005	\$6,706,547	N/A	\$5,766,604	\$58,592,121	45,797
2009 Durango Film Fest (CO)	\$7,921	\$3,993	\$19,064	\$5,545	N/A	\$1,792	\$38,315	425
2009 Big Sky Documentary Film Festival (MT)	\$2,167,340	\$11,582,802	\$464,156	\$216,734	\$186,046	\$310,716	\$14,927,794	9,590
2007 Eugene International Film Festival (IA)	\$190,368	\$11,340	\$80,220	\$61,320	\$57,540	\$22,680	\$423,468	32,457
Average	\$203.60	\$403.73	\$52.44	\$28.91	\$10.59	\$40.81		
Fine Art								
2010 Columbus Arts Festival (OH)	\$1,564,500	\$675,500	\$4,564,000	\$2,569,000	N/A	\$612,500	\$9,985,500	350,000
2010 Market Street Festival (MS)	\$3,744,387	\$2,735,131	\$9,224,279	\$1,270,196	N/A	\$3,610,420	\$14,783,475	104,000
2009 Artscape (MD)	\$275,699	\$1,300,406	\$2,370,143	\$1,738,376	\$1,334,380	N/A	\$7,019,004	350,000
2006 Fort Worth Arts Festival (TX)	\$665,047	\$2,181,367	\$901,356	\$139,391	\$45,995	\$109,991	\$4,043,147	198,811
Average	\$11.15	\$12.66	\$25.43	\$7.21	\$2.02	\$12.34		
Food								
2011 BOPA Farmers Market (MD)	N/A	\$34,747	\$4,409	N/A	N/A	\$1,390	\$40,546	663
2007 Fiesta Oyster Bake (TX)	\$519,181	\$541,622	\$2,245,156	\$163,114	\$8,642	\$171,938	\$3,649,653	52,189

²⁶ "Average" refers to the average weighted spending per capita for each spending category.

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Events	Hotels	Transportation	Food and Beverage	Retail	Entertainment	Other	Total Spending	Total Attendance
2005 Food Festivals (IA)	\$589,514	\$227,027	\$579,703	\$270,402	N/A	N/A	\$1,666,645	22,806
2003 Lodi Grape Festival & Harvest Fair (CA)	\$1,928,321	\$164,428	N/A	\$1,305,689	\$3,204,549	\$1,328,723	\$7,931,710	173,850
Average	\$15.63	\$40.28	\$7.29	\$7.09	\$9.30	\$4.34		
Holiday								
2010 Sea Witch Festival (DE)	\$289,000	\$269,000	\$1,453,000	\$382,000	N/A	\$264,000	\$2,657,000	100,000
2010 White House Easter Egg Role (DC)	\$268,500	\$98,100	\$417,900	\$99,900	N/A	\$80,400	\$964,800	30,000
2009 Riverfest (AR)	\$30,026,653	\$43,249,399	\$17,896,496	\$13,284,169	\$13,142,710	\$6,784,475	\$124,383,902	186,131
2007 Light in Winter Festival (NY)	\$26,055	\$12,711	\$18,564	\$38,319	\$6,384	N/A	\$102,033	3,000
Average	\$45.46	\$66.75	\$29.02	\$20.39	\$1.06	\$13.92		
Performing Arts								
2011 Electric Daisy Festival Las Vegas (NV)	\$1,000,232	\$865,634	\$371,754	\$542,726	\$477,949	\$400,075	\$3,658,466	12,000
2008 American Folk Festival in Bangor (ME)	\$914,287	\$772,117	\$1,197,527	\$829,413	\$338,447	N/A	\$4,051,791	95,626
2005 Bonnaroo Music Festival in Coffee County (TN)	\$408,116	\$6,664,260	\$8,828,297	\$2,328,709	\$1,282,803	\$1,933,245	\$21,445,430	76,851
2005 Spoleto Festival (SC)	\$4,134,390	\$528,450	\$5,494,710	\$2,963,220	\$240,630	N/A	\$13,361,400	39,000
Average	\$51.06	\$85.11	\$36.48	\$38.39	\$16.56	\$29.25		
Other								
2012 Baltimore Running Festival (MD)	\$3,616,347	\$3,078,208	\$2,241,354	\$2,261,674	\$1,943,934	\$4,663,110	\$17,804,627	59,247
2010 Philadelphia International Flower Show (PA)	\$2,929,687	\$1,401,099	\$6,374,807	N/A	N/A	\$8,092,861	\$18,798,454	231,924
2009 The Great New England Air Show (MA)	\$1,121,936	\$2,239,297	\$3,481,114	\$1,714,018	\$192,175	\$219,628	\$8,968,168	345,000
2000 Skagit Valley Tulip Festival (WA)	\$1,400,000	\$2,400,000	\$4,800,000	\$5,400,000	N/A	N/A	\$14,000,000	350,000
Average	\$20.23	\$25.81	\$19.41	\$14.39	\$16.68	\$38.08		

Sources: Various²⁷

²⁷ For a full list of the references used, please refer to Section 6.0.

RESI determined fiscal impacts primarily based on district responses provided in the annual reports. The project team cross-referenced responses to questions regarding property tax credits in the annual reports with information available from the State Department of Assessment and Taxation (SDAT)’s online property database. None of the properties that were reported as applying for a property tax credit on the annual reports from FY 2013 received the A&E tax credit per the project team’s research within SDAT’s database. RESI did not assume that all such applications were approved as this would likely overstate the impacts of property tax credits in the A&E districts, therefore understating the fiscal impacts.

A.3 Modeling Assumptions

RESI analyzed IMPLAN industry sectors based on application materials and annual reports provided by MSAC. The specific IMPLAN industry sectors used for the A&E districts can be found in Figure 8.

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

Figure 8: IMPLAN Industry Sectors

Input Category	IMPLAN Code	Description
Commercial Employment		
	321	Retail stores – Furniture and home furnishings
	322	Retail stores – Electronics and appliances
	323	Retail stores – Building material and garden supplies
	324	Retail stores – Food and beverage
	325	Retail stores – Health and personal care
	326	Retail stores – Gasoline stations
	327	Retail stores – Clothing and clothing accessories
	328	Retail stores – Sporting goods, hobby, book, and music stores
	329	Retail stores – General Merchandise
	330	Retail stores – Miscellaneous
	341	Newspaper publishers
	346	Motion picture and video industries
	348	Radio and television broadcasting
	354	Monetary authorities and depository credit intermediation activities
	358	Insurance agencies, brokerages, and related services
	360	Real estate
	367	Legal services
	368	Accounting, tax preparation, bookkeeping, and payroll services
	369	Architectural, engineering, and related services
	374	Management, scientific, and technical consulting services
	375	Environmental and other technical consulting services
	378	Photographic services
	380	All other miscellaneous professional, scientific, and technical services
	382	Employment services
	383	Travel arrangement and reservation services

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Input Category	IMPLAN Code	Description
	392	Junior colleges, colleges, universities, and professional schools
	393	Other educational services
	394	Offices of physicians, dentists, and other health practitioners
	396	Medical and diagnostic labs and outpatient and other ambulatory services
	398	Nursing and residential care facilities
	399	Child day care services
	402	Performing arts companies
	404	Promoters of performing arts and sports and agents for public figures
	405	Independent artists, writers, and performers
	406	Museums, historical sites, zoos and parks
	407	Fitness and recreational sports centers
	410	Other amusement and recreation industries
	411	Hotels and motels, including casino hotels
	412	Other accommodations
	413	Restaurants
	423	Religious organizations
Event Spending		
Retail	324	Retail stores – Food and beverage
	325	Retail stores – Health and personal care
	326	Retail stores – Gasoline stations
	327	Retail stores – Clothing and clothing accessories
	328	Retail stores – Sporting goods, hobby, book, and music stores
	330	Retail stores – Miscellaneous
Transportation	332	Transport by air
	333	Transport by rail
	336	Transit and ground passenger transportation
	338	Scenic and sightseeing transportation and supporting activities
Entertainment	402	Performing arts companies
	403	Spectator sports companies
	404	Promoters of performing arts and sports and agents
	405	Independent artists, writers, and performers
	406	Museums, historical sites, zoos, and parks
	407	Fitness and recreational sports centers
	408	Bowling centers
	410	Other amusement and recreation industries
Hotels	411	Hotels and motels, including casino hotels
Food	413	Food services and drinking places
Other	414	Automotive repair and maintenance, except car washes
	415	Car washes
	418	Personal and household goods repair and maintenance
	419	Personal care services
	421	Dry-cleaning and laundry services
	422	Other personal services

Source: IMPLAN

A.4 Exclusions

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

Due to the difficulty in determining if A&E district enterprises had been formed as a direct result of the A&E district designation or if these businesses had been formed as a result of some other factor(s), attendance data for A&E district enterprises was excluded. To avoid overstating the impact of property tax exemptions and therefore understating the fiscal impacts of the A&E districts, RESI excluded property tax exemptions, as no applications were shown to be approved when cross referenced with SDAT's database.

Other A&E district operations that would contribute to positive economic impact were excluded in the analysis due to data gaps. Such factors include the new art sales for artists and galleries, ticket/entry expenditures for arts enterprises, rental income from artists' space, and awarded grants. These were not included in the analysis for a variety of reasons including but not limited to lack of data.

Due to the limitations in this study, RESI recommends that MSAC consider the following for the next designation period:

- Require uniform building inventories, including address, zoning type, square footage, land area, last sale date, last sale value, assessment value, age of building, and other pertinent details.
- Require detailed building data for new businesses in annual reports.
- Require detailed employment data for new and closing businesses in annual report.
- Require detailed enterprise and event data, including name, address, attendance, and ticket sales (where applicable), in annual reports.

A.5 Limitations of the Data Provided

A&E districts are expected to complete annual reports to provide information regarding goals, accomplishments, new establishments, events and promotions, attendance figures, and awards and grants for the fiscal year. These reports were provided by MSAC and cover FY 2013. All A&E districts submitted reports for this period.

While each A&E district received identically formatted questions, not all reports were completed in the same way. For instance, all of the A&E districts did not provide a response for every question. In most cases, these differences did not require RESI to make additional assumptions.

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The use of an updated, standardized survey tool would help in improving uniformity of responses across A&E districts, allowing for increased analytical precision.

Appendix B—Glossary

A glossary of economic and fiscal impact terminology frequently used throughout this report can be found in Figure 9.

Figure 9: Glossary of Terms

Term	Definition
Economic Impact	This term refers to the changes in the economy resulting from an event. RESI typically reports employment, output, and wage impacts.
Employment	This term refers to the number of new full-time equivalent (FTE) jobs created as a result of the event which has been modeled in IMPLAN.
Fiscal 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 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 number of for-profit and nonprofit businesses cannot be precisely determined from the data provided.
Output	This term refers to the economic activity created as a result of the event which has been modeled in IMPLAN. It is synonymous with “state GDP.” In other words, it is the market value of all goods and services produced by the economy of the region being modeled.
State GDP	This term refers to the change in market value of all goods and services produced by the economy of the region which has been modeled in IMPLAN. It is synonymous with “output.”
Wage Impact	This term refers to the change in employee compensation (including all salaries and wages) associated with the job and output creation resulting from the event which has been modeled in IMPLAN.

Source: RESI

Appendix C— MSAC Annual Report



**Arts & Entertainment Districts
Annual Report**
Fiscal Year (FY) 2013
DEADLINE: SEPTEMBER 30, 2013

FOR THE PERIOD: JULY 1, 2012 - JUNE 30, 2013

PLEASE COMPLETE THE FOLLOWING:

District Name:	
County:	Year Authorized: (YYYY)
Re-Certification Date if completed: (MM/DD/YY)	Expansion (If Granted): (MM/DD/YYYY)
Re-Certification Due: (MM/DD/YY)	Total Acreage:
Managing Entity:	
Tax Exempt Number:	
Website:	
A&E DISTRICT CONTACT PERSON	BOARD CHAIR/MANAGEMENT TEAM CHAIR
Name:	Name:
Title:	Title:
Address:	Address:
City:	City:
State: – MD	State: MD
Zip Code:	Zip Code:
Phone:	Phone:
Mobile:	Mobile:
Email:	Email:
Fax:	Fax:

List District Stakeholders/Partners (i.e., County Arts Council, Local Tourism Council, Community Development Corporation, Downtown Partnership) and Contact Name for each.

Stakeholder/Partner

Contact Name

For each of the following SECTIONS, you may use as much space as required. Please answer all questions.

SECTION I: DISTRICT ACCOMPLISHMENTS DURING FY 2013

In SECTION I, please identify only the new initiatives, events, festivals, projects, or enterprises during FY13.

Accomplishments may include, but are not limited to, new initiatives undertaken by district management (programming or administrative), new events, new festivals, new public art projects, new capital projects, new retailers, new businesses, new restaurants, and /or organizations newly located in the district.

- A. Narrative Overview:
- B. If there were any new initiatives undertaken by district management during FY 2013, list each separately.
- C. If any new events occurred in the district during FY 2013, list each separately. *(New events that are presented by organizations or enterprises other than the management of the A&E district should also be included but it must be a new public event. For example, ABC Arts Organization presents a new Halloween Lantern Parade that takes place in the district.)*
- D. If any new festivals occurred in the district during FY 2013, list each separately. *(New festivals that are presented by organizations or enterprises other than the management of the A&E district should also be included but it must be a new public festival. For example, ABC Community Organization presents a new holiday festival of trees that takes place in the district.)*
- E. If there were any new public art projects initiated or completed in the district during FY 2013, list the name/location of each separately and indicate if the project is complete. *(New public art projects that are produced by organizations or enterprises other than the management of the A&E district should be included.)*

- F. If there were any new capital projects initiated or completed in the district during FY 2013, list the name/address of each separately and indicate if the project is complete. *(New capital projects that are undertaken by organizations or enterprises other than the management of the A&E district should also be included.)*
- G. If any new retailers opened in the district during FY 2013, list each separately and indicate the number of full/part time jobs gained.
- H. If any new businesses opened in the district during FY 2013, list each separately and indicate the number of full/part time jobs gained.
- I. If any new restaurants opened in the district during FY 2013, list each separately and indicate the number of full/part time jobs gained.
- J. If any organizations newly located in the district during FY 2013, list each separately and indicate the number of full/part time jobs gained.

SECTION II: CLOSINGS

In SECTION II, identify only the enterprises that closed during FY13.

- A. If any retailers closed in the district during FY 2013, list each separately and indicate the number of full/part time jobs lost.
- B. If any businesses closed in the district during FY 2013, list each separately and indicate the number of full/part time jobs lost.
- C. If any restaurants closed in the district during FY 2013, list the name of each separately and indicate the number of full/part time jobs lost.
- D. If any organizations closed or relocated outside the district during FY 2013, list each separately and indicate the number of full/part time jobs lost.

SECTION III: FY13 CHALLENGES/SUCSESSES

- A. Describe any challenges or issues encountered in the past year. Include the following if applicable: Technology, Administrative, Funding, and/or Other. Indicate if resolved or not.
- B. Describe any successes or innovations that took place during FY13. Include the following if applicable: Technology, Administrative, Funding, and/or Other.

SECTION IV: DISTRICT EVENTS AND FESTIVALS DURING FY2013

- A. **EVENTS:** List all district events that occurred during FY2013. Include event names, date(s), and estimated attendance. *(Events that are presented by organizations or enterprises other than the management of the A&E district should also be included but it must be a public event. For example, ABC Arts Organization holds a Halloween Lantern Parade that takes place in the district.)*
- B. **FESTIVALS:** List all district festivals that occurred during FY2013. Include festival names, date(s), and estimated attendance. *(Festivals that are presented by organizations or enterprises other than the management of the A&E district should also be included but it must be a public festival. For example, ABC Community Organization holds a holiday festival of trees that takes place in the district.)*

SECTION V:

- A. **DISTRICT ARTS AND ENTERTAINMENT ENTERPRISES** List all enterprises. Include type of enterprise, name of enterprise, and estimated annual attendance. *For those organizations that perform, exhibit, or provide services outside of the district, only include attendance that occurs within the district under Estimated Annual Attendance. Include these types: Galleries/Co-ops, Performance Venues, Museums, Arts Education, Arts Organizations, Public Art, Arts Suppliers/Service, Other.*

Type	Name	Estimated Annual Attendance
Galleries/Coops:		
Performance Venues:		
Museums:		
Arts Education:		
Arts Organizations:		
Public Art:		
Suppliers/Service:		
Other:		

B. ARTIST HOUSING: Include name, number of units, and developer.

C. Occupancy Rate

Mixed Use is defined as a combination of residential, commercial, industrial, office, institutional, or other land uses on the same site.

Estimate District Occupancy Rate FY 2013:

Storefront/Commercial	_____	%
Residential (live/work)	_____	%
Industrial/Manufacturing	_____	%
Mixed Use	_____	%

Estimate District Occupancy Rate FY 2013:

Storefront/Commercial	_____	%
Residential (live/work)	_____	%
Industrial/Manufacturing	_____	%
Mixed Use	_____	%

SECTION VI: DISTRICT BENEFIT INFORMATION

A. Does the A. If the district maintains an artist registry:
 provide the total number of registered artists: _____
 provide the number of new artists registered in FY 2013: _____
 estimate the number of artists in the district that are not registered:

If not, estimate the number of artists in the district: _____

B. If the district has an artist relocation program, provide the number of artists relocating to the district during FY 2013 as a result of that program.:

C. Were List each business in the district eligible for an abatement of the Admission and Amusement Tax.

D. If there were any property tax credits applied for, list each developer.

E. Other than the state tax incentives, list any additional incentives provided by city/county.

F. If the district maintain a website, please indicate features. (e.g., on-line events calendar, artist registry, map, press room, artist income tax information, developer property tax information/application, etc.):

SECTION VII: PUBLIC FUNDING

A. If the Maryland State Arts Council awarded grants to the A&E District during FY 2013, list each grant program and grant amount separately.

B. Indicate any other state funding awards/grants to the A&E District during FY13:

ENTITY	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
Maryland Main Street Heritage Areas Authority/Planning	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Department of Transportation	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Department of Planning	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Capital Bond	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Other – Specify:	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Other – Specify:	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____

C. Indicate any local awards/grants to the A&E District in FY13:

ENTITY	AWARD/GRANT AMOUNT
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

D. If your district receives operating support, indicate who provides the operating support and how much.

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E. Indicate any federal or national funding applications/awards/grants during FY 2013:

ENTITY	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
National Endowment for the Arts	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
National Trust for Historic Preservation	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Other – Specify:	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Other – Specify:	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____

SECTION VIII: FY13 (JULY 1, 2013 – JUNE 30, 2014) GOALS AND WORK PLAN

- A. List your district’s FY13 goals.
- B. Summarize your district’s FY 2014 work plan to achieve these goals.

SECTION IX: MSAC TECHNICAL ASSISTANCE

- A. What type of technical assistance workshops would serve to strengthen your A&E District? (e.g., Board Development, Financial Management, Fundraising, Funding Opportunities, Other)

X. CERTIFICATION

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

Printed

Name _____

Title _____

Date _____

Checking this box verifies that the name typed above is authorized to sign this Maryland State Arts Council A&E Districts Annual Report on behalf of the A&E District. I certify that all information contained in this report is true and accurate to the best of my knowledge.

Appendix D—A&E District Websites

For reference purposes, the counties and websites for each A&E district (where available) can be found in Figure 10.

Figure 10: 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/
Bethesda	Montgomery	http://www.bethesda.org/
Bromo Tower	Baltimore City	http://www.bromoseltzertower.com/
Cambridge	Dorchester	http://www.cambridgemainstreet.com/
Cumberland	Allegany	http://www.alleganyartsCouncil.org/static.php?page=208
Denton	Caroline	http://www.downtowndenton.com/ae.html
Elkton	Cecil	http://www.elktonalliance.org/arts/index.asp
Frederick	Frederick	http://www.downtownfrederick.org/
Frostburg	Allegany	http://www.alleganyartsCouncil.org/static.php?page=210
Gateway	Prince George's	http://mygatewayarts.org/
Hagerstown	Washington	http://www.washingtoncountyarts.com/
Havre de Grace	Harford	http://www.havredegracearts.org/
Highlandtown	Baltimore City	http://www.highlandtownarts.com/
Salisbury	Wicomico	http://moonshell.net/salisburyaed/
Silver Spring	Montgomery	http://silverspringdowntown.com/
Snow Hill	Worcester	http://www.snowhillmd.com/liveHere/maps.cfm
Station North	Baltimore City	http://www.stationnorth.org/
Wheaton	Montgomery	http://www.wheatonmd.org/

Source: MSAC