MSAC
Arts and Entertainment Districts
Survey Analysis

FY 2023

October 2024

Executive Summary

Founded more than five decades ago, the Maryland State Arts Council (MSAC) is tasked with ensuring that all Marylanders have access to the arts[1]. MSAC is housed within Maryland's Department of Commerce and engages in a variety of activities to support the arts ecosystem within the state, including awarding grants to non-profit organizations for arts programming and projects, awarding grants to independent artists, and providing technical assistance and professional development to individuals and groups.

Managed by MSAC, the Arts and Entertainment District (A&E District) program strives to "develop, promote, and support diverse artistic and cultural centers in communities across Maryland that preserve a sense of place, provide unique local experiences, attract tourism, and spur economic revitalization and neighborhood pride"[2].

Each year, MSAC requires A&E Districts to complete an annual survey which summarizes activity from the previous fiscal year. These surveys are then provided to Maryland Department of Commerce's Office of Research, Policy, and Government Affairs (ORPGA) staff for tabulation and analysis. This report is the first of two that ORPGA provides to MSAC; the second document is an economic impact analysis which quantifies the effects of employment and visitor spending within the A&E Districts.

Some key takeaways from the FY 23 (July 1, 2022 to June 30, 2023) survey analysis include:
- Maryland's A&E Districts reported:
  - 170 new or completed capital projects
  - 90 new retailers
  - 86 new businesses
  - 108 new restaurants
  - 32 new organizations
- After factoring in various closures, districts reported net changes of:
  - +23 retailers
  - +58 businesses
  - +64 restaurants
  - +21 organizations
- The 27 reporting A&E districts held a combined 4,978 events and 216 festivals in FY23. In total, these events and festivals attracted roughly 2.1 million attendees.
- Maryland's A&E districts are home to 895 assets/enterprises. These include 229 public art projects, 152 performance venues, and 149 galleries. Other enterprises include museums, arts organizations, arts education organizations, arts suppliers, and "other" enterprises.

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[1] https://msac.org/about
[2] https://www.msac.org/programs/arts-entertainment-districts

- Eleven of Maryland's A&E Districts made artist housing available, providing a total of nearly 1,200 units.
- Fourteen of Maryland's A&E Districts maintained an artist registry. Within those districts, 172 artists registered during FY 23. Across all of Maryland's A&E Districts, there are an estimated 6,739 artists working within district boundaries.
- Nineteen businesses took advantage of Admission and Amusement Tax abatement and three businesses utilized property tax credits. Other incentives available include façade improvement, loans, grants, "other", and non-financial incentives.
- In total, districts reported receiving over $9.4 million in funding and in-kind support in FY 23.
  - The most common source of funding was from MSAC; all districts other than Easton reported receiving a total of $1.3 million.
  - The largest source of funding ($4.8 million) came from state sources other than MSAC. Note, however, that this figure is largely due to $4.2 million being awarded to Station North by the Department of General Services and the Department of Housing and Community Development.
  - Other funding was provided through local councils or municipalities ($2.6 million), in-kind support ($669 thousand), and the federal government ($55 thousand).
- As part of their survey responses, A&E Districts reported some of their major challenges. These included:
  - COVID-19-related issues, particularly as they related to event attendance
  - Difficulty finding and engaging with volunteers
  - Administrative and organizational issues
  - Availability and affordability of suitable real estate
  - Weather and climate change as an increasing threat
- Types of technical assistance that districts feel would be beneficial include:
  - Resources to help navigate the tax incentive process
  - Assistance with marketing and community engagement
  - Providing stakeholders with MSAC reference materials, including annual reports and programming information

Introduction

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

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

One program that MSAC runs is the Arts & Entertainment District (A&E District) program. A&E Districts are designated areas that promote community involvement, tourism, and revitalization through tax-related incentives. This report contains information for 27 A&E Districts that completed their fiscal year (FY) 23 annual report (July 1, 2022, through June 30, 2023). Every year, districts are required to submit an annual report to MSAC. MSAC has shared these reports for state FY 2023 with Commerce's Office of Research, Policy, and Government Affairs (ORPGA) for tabulation and analysis. This document, which collates information that districts provided to MSAC, is the first of two that ORPGA will provide to MSAC; the second document is an economic impact analysis associated with employment and visitor spending within the A&E Districts.

Please note that ORPGA did not validate the self-reported data provided by MSAC and the districts. In cases where there was clearly a mistake (for example, an event was listed with a date that was not in FY 23), ORPGA cleaned the data. However, there was no systematic process to confirm every data point contained in the district annual reports. As such, there may be slight variation in the contents of this report and the true activity in Maryland's A&E Districts in FY 23.

District Entities and Businesses

Districts provided information about new and closed entities within their borders during FY 23. Entities include capital projects, retailers, businesses, restaurants, and organizations. Please note that this is self-reported data from the districts, and there may be variation in how different districts categorized certain entities (for example, one district may have categorized a coffee shop/bookstore as a retailer, while another district may have categorized a coffee shop/bookstore as a restaurant).

Figure 1: New Entities in Maryland's A&E Districts in FY23

District	Capital Projects #	Capital Projects %	Retailers #	Retailers %	Businesses #	Businesses %	Restaurants #	Restaurants %	Organizations #	Organizations %
Annapolis	0	0%	1	1%	2	2%	1	1%	0	0%
Bel Air	0	0%	4	4%	10	12%	1	1%	0	0%
Berlin	6	4%	1	1%	0	0%	6	6%	0	0%
Bethesda	5	3%	9	10%	7	8%	11	10%	6	19%
Bromo Tower	17	10%	8	9%	1	1%	28	26%	5	16%
Cambridge	3	2%	1	1%	1	1%	1	1%	0	0%
Catonsville	3	2%	0	0%	4	5%	2	2%	0	0%
Chestertown	5	3%	2	2%	1	1%	0	0%	0	0%
Crisfield	4	2%	1	1%	2	2%	0	0%	1	3%
Cumberland	5	3%	5	6%	5	6%	4	4%	0	0%
Denton Artsway	7	4%	2	2%	1	1%	0	0%	1	3%
Easton	0	0%	3	3%	0	0%	1	1%	0	0%
Elkton	0	0%	0	0%	2	2%	1	1%	0	0%
Frederick	16	9%	10	11%	6	7%	6	6%	0	0%
Frostburg	2	1%	3	3%	0	0%	1	1%	0	0%
Grantsville	2	1%	0	0%	0	0%	1	1%	0	0%
Hagerstown	16	9%	1	1%	4	5%	1	1%	0	0%
Havre de Grace	2	1%	11	12%	3	3%	3	3%	3	9%
Highlandtown	15	9%	5	6%	8	9%	4	4%	2	6%
Leonardtown	9	5%	4	4%	4	5%	4	4%	3	9%
Oakland	0	0%	0	0%	0	0%	0	0%	0	0%
Salisbury	13	8%	5	6%	5	6%	0	0%	9	28%
Silver Spring	28	16%	10	11%	10	12%	16	15%	0	0%
Snow Hill	0	0%	0	0%	3	3%	0	0%	0	0%
Station North	6	4%	0	0%	2	2%	2	2%	2	6%
Stevensville	1	1%	1	1%	0	0%	0	0%	0	0%
Wheaton	5	3%	3	3%	5	6%	14	13%	0	0%
Total	**170**	**100%**	**90**	**100%**	**86**	**100%**	**108**	**100%**	**32**	**100%**

Sources: A&E Districts, ORPGA

In FY23, districts reported 170 new capital projects, 90 new retailers, 86 new businesses, 108 new restaurants, and 32 new organizations. Silver Spring reported the largest number of new capital projects; Havre de Grace reported the largest number of new retailers; Bel Air and Silver Spring reported the largest number of new businesses; Bromo Tower reported the largest number of new restaurants; Salisbury reported the largest number of new organizations. Of note, Bromo Tower's large number of new restaurants are tied to the renovation of Lexington Market, a historic public market in Baltimore City.

Figure 2: Entity Closures/Relocations Out of District Boundaries by Type in Maryland's A&E Districts in FY23

District	Retailers #	Retailers %	Businesses #	Businesses %	Restaurants #	Restaurants %	Organizations #	Organizations %
Annapolis	3	4%	4	14%	4	9%	0	0%
Bel Air	8	12%	2	7%	1	2%	0	0%
Berlin	1	1%	0	0%	3	7%	1	9%
Bethesda	8	12%	7	25%	6	14%	0	0%
Bromo Tower	1	1%	1	4%	1	2%	1	9%
Cambridge	1	1%	0	0%	1	2%	0	0%
Catonsville	2	3%	0	0%	1	2%	0	0%
Chestertown	1	1%	0	0%	0	0%	0	0%
Crisfield	1	1%	1	4%	0	0%	0	0%
Cumberland	4	6%	1	4%	0	0%	0	0%
Denton Artsway	1	1%	0	0%	0	0%	0	0%
Easton	1	1%	0	0%	2	5%	0	0%
Elkton	2	3%	1	4%	0	0%	0	0%
Frederick	12	18%	2	7%	4	9%	0	0%
Frostburg	0	0%	0	0%	0	0%	0	0%
Grantsville	1	1%	0	0%	0	0%	0	0%
Hagerstown	2	3%	0	0%	0	0%	0	0%
Havre de Grace	2	3%	0	0%	0	0%	0	0%
Highlandtown	4	6%	5	18%	6	14%	0	0%
Leonardtown	0	0%	0	0%	1	2%	0	0%
Oakland	3	4%	0	0%	0	0%	0	0%
Salisbury	4	6%	3	11%	1	2%	8	73%
Silver Spring	2	3%	1	4%	8	18%	0	0%
Snow Hill	1	1%	0	0%	0	0%	0	0%
Station North	0	0%	0	0%	1	2%	1	9%
Stevensville	1	1%	0	0%	0	0%	0	0%
Wheaton	1	1%	0	0%	4	9%	0	0%
Total	**67**	**100%**	**28**	**100%**	**44**	**100%**	**11**	**100%**

Sources: A&E Districts, ORPGA

In FY 23, districts reported that a total of 67 retailers, 28 businesses, 44 restaurants, and 11 organizations closed or moved out of district borders. Frederick reported the largest number of retail closures; Bethesda reported the largest number of business closures; Silver Spring reported the largest number of restaurant closures; Salisbury reported the largest number of organization closures (but also the largest number of new organizations as shown in Figure 1).

The net change in entities in Maryland's A&E Districts is reported below. Employment at net new businesses will be used in the A&E District economic impact analysis.

Figure 3: Net Change in Entities in Maryland's A&E Districts in FY23

District	Retailers #	Retailers %	Businesses #	Businesses %	Restaurants #	Restaurants %	Organizations #	Organizations %
Annapolis	-2	-9%	-2	-3%	-3	-5%	0	0%
Bel Air	-4	-17%	8	14%	0	0%	0	0%
Berlin	0	0%	0	0%	3	5%	-1	-5%
Bethesda	1	4%	0	0%	5	8%	6	29%
Bromo Tower	7	30%	0	0%	27	42%	4	19%
Cambridge	0	0%	1	2%	0	0%	0	0%
Catonsville	-2	-9%	4	7%	1	2%	0	0%
Chestertown	1	4%	1	2%	0	0%	0	0%
Crisfield	0	0%	1	2%	0	0%	1	5%
Cumberland	1	4%	4	7%	4	6%	0	0%
Denton Artsway	1	4%	1	2%	0	0%	1	5%
Easton	2	9%	0	0%	-1	-2%	0	0%
Elkton	-2	-9%	1	2%	1	2%	0	0%
Frederick	-2	-9%	4	7%	2	3%	0	0%
Frostburg	3	13%	0	0%	1	2%	0	0%
Grantsville	-1	-4%	0	0%	1	2%	0	0%
Hagerstown	-1	-4%	4	7%	1	2%	0	0%
Havre de Grace	9	39%	3	5%	3	5%	3	14%
Highlandtown	1	4%	3	5%	-2	-3%	2	10%
Leonardtown	4	17%	4	7%	3	5%	3	14%
Oakland	-3	-13%	0	0%	0	0%	0	0%
Salisbury	1	4%	2	3%	-1	-2%	1	5%
Silver Spring	8	35%	9	16%	8	13%	0	0%
Snow Hill	-1	-4%	3	5%	0	0%	0	0%
Station North	0	0%	2	3%	1	2%	1	5%
Stevensville	0	0%	0	0%	0	0%	0	0%
Wheaton	2	9%	5	9%	10	16%	0	0%
Total	**23**	**100%**	**58**	**100%**	**64**	**100%**	**21**	**100%**

Sources: A&E Districts, ORPGA

In FY 23, districts reported a net growth of 23 retailers, 58 businesses, 64 restaurants, and 21 organizations. The plurality of retail net growth occurred in Havre de Grace; the plurality of business net growth occurred in Silver Spring; the plurality of restaurant net growth occurred in Bromo Tower; the plurality of organization net growth occurred in Bethesda.

District Events and Festivals

Districts provided information regarding events and festivals that were held within their borders during FY 23. Responses to this prompt varied greatly between districts—some included a few large-scale events, while other districts provided a comprehensive list of all events/programming that occurred at sites such as public libraries within the district. ORPGA

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collated the lists from each district and lightly cleaned the responses—for example, removing entries that did not occur in FY 23 or programming that was a virtual event. However, ORPGA did not validate nor systematically clean the event or festival data. Attendance data from events and festivals will be used for the economic impact study of A&E Districts.

Figure 4: A&E District Events, FY 23

District	Events	Percent	Reported Attendance
Annapolis	14	0.3%	40,760
Bel Air	1,026	20.6%	175,889
Berlin	34	0.7%	49,500
Bethesda	22	0.4%	10,300
Bromo Tower	904	18.2%	291,356
Cambridge	51	1.0%	2,665
Catonsville	199	4.0%	65,881
Chestertown	193	3.9%	22,984
Crisfield	123	2.5%	8,906
Cumberland	34	0.7%	10,517
Denton Artsway	126	2.5%	4,095
Easton	17	0.3%	10,000
Elkton	40	0.8%	12,450
Frederick	119	2.4%	232,598
Frostburg	252	5.1%	53,775
Grantsville	2	0.04%	3,000
Hagerstown	61	1.2%	18,289
Havre de Grace	154	3.1%	16,335
Highlandtown	414	8.3%	42,336
Leonardtown	81	1.6%	43,520
Oakland	49	1.0%	19,700
Salisbury	116	2.3%	38,285
Silver Spring	397	8.0%	256,129
Snow Hill	3	0.1%	3,850
Station North	293	5.9%	16,780
Stevensville	7	0.1%	1,985
Wheaton	247	5.0%	39,559
Total	**4,978**	**100.0%**	**1,491,444**

Sources: A&E Districts

As seen above, A&E Districts reported that 4,978 events with a total of nearly 1.5 million attendees were held within their borders in FY 23. Bel Air reported the largest number of events, at 1,026, followed by Baltimore City's Bromo Tower, with 904. Bromo Tower reported the largest number of visitors to events, with 291,356. Silver Spring reported the second-highest number of visitors, with 256,129.

Figure 5: A&E District Festivals, FY 23

District	Festivals	Percent	Reported Attendance
Annapolis	3	1.4%	26,050
Bel Air	5	2.3%	56,000
Berlin	1	0.5%	4,000
Bethesda	1	0.5%	15,000
Bromo Tower	0	0.0%	0
Cambridge	26	12.0%	9,500
Catonsville	7	3.2%	1,725
Chestertown	6	2.8%	9,750
Crisfield	8	3.7%	7,840
Cumberland	11	5.1%	8,950
Denton Artsway	3	1.4%	7,050
Easton	8	3.7%	45,000
Elkton	6	2.8%	4,830
Frederick	7	3.2%	N/R
Frostburg	16	7.4%	15,900
Grantsville	5	2.3%	6,500
Hagerstown	11	5.1%	6,054
Havre de Grace	11	5.1%	53,300
Highlandtown	4	1.9%	21,250
Leonardtown	6	2.8%	13,200
Oakland	1	0.5%	3,500
Salisbury	3	1.4%	41,800
Silver Spring	41	19.0%	186,364
Snow Hill	11	5.1%	8,000
Station North	7	3.2%	3,673
Stevensville	2	0.9%	3,000
Wheaton	6	2.8%	20,400
Total	**216**	**100.0%**	**578,636**

Sources: A&E Districts

Maryland's A&E Districts reported that 216 festivals were held within their borders in FY 23. Silver Spring reported the largest number of festivals and the highest attendance, with 41 festivals hosting a total of 186,364 attendees. With 26 festivals, Cambridge reported hosting the second-highest number of festivals.

District Assets and Incentives

Districts provided information regarding the number and types of enterprises located within their districts. This information is presented in Figure 6.

Figure 6: Arts Enterprises by Type and District, FY 23

District	Galleries/ Co-ops	Performance venues	Museums	Arts Orgs.	Arts Ed. Orgs.	Public Art	Arts suppliers/ services	Other	Total
Annapolis	3	3	1	17	0	21	3	5	53
Bel Air	1	6	2	1	3	0	0	0	13
Berlin	2	1	0	1	0	0	2	8	14
Bethesda	8	5	0	0	9	0	6	2	30
Bromo Tower	9	3	3	11	0	0	6	2	34
Cambridge	1	2	2	2	1	10	2	2	22
Catonsville	1	7	0	3	6	8	19	0	44
Chestertown	6	3	0	1	3	4	2	0	19
Crisfield	3	0	1	0	0	0	0	0	4
Cumberland	7	5	6	0	0	3	0	0	21
Denton Artsway	2	7	1	0	0	1	0	2	13
Easton	5	2	1	0	0	0	0	0	8
Elkton	4	3	1	1	4	11	2	0	26
Frederick	11	4	1	4	3	24	3	0	50
Frostburg	5	5	0	1	4	5	7	0	27
Grantsville	4	2	2	3	2	1	1	0	15
Hagerstown	5	4	5	3	3	0	5	7	32
Havre de Grace	7	3	0	0	0	0	0	0	10
Highlandtown	11	2	1	2	0	0	0	1	17
Leonardtown	5	5	0	1	2	10	2	0	25
Oakland	2	6	3	1	0	7	5	1	25
Salisbury	4	7	0	2	3	14	4	0	34
Silver Spring	11	29	2	15	6	83	15	35	196
Snow Hill	5	4	0	0	0	0	0	0	9
Station North	21	17	0	8	10	5	7	0	68
Stevensville	3	5	0	4	0	1	2	0	15
Wheaton	3	12	0	4	4	21	2	25	71
Total	**149**	**152**	**32**	**85**	**63**	**229**	**95**	**90**	**895**

Sources: A&E Districts

Districts reported that there were 895 arts enterprises within their districts in FY 23. Public Art was the most common type of enterprise, with 229 works throughout the state. Performance venues were the next-most-frequent type of enterprise, with 152 venues. Silver Spring and Wheaton reported the largest numbers of enterprises, at 196 and 71 respectively. Both districts included a large number of "other" enterprises, which were often listed as foodways, historic sites, and breweries.

Districts provided information on housing opportunities for artists within their boundaries, presented below.

Figure 7: Artist Housing Availability in Maryland's A&E Districts, FY 23

District	Housing?	Buildings/Complexes	Units
Annapolis	n/a		
Bel Air	n/a		
Berlin	n/a		
Bethesda	Yes	1	
Bromo Tower	Yes	5	330
Cambridge	n/a		
Catonsville	n/a		
Chestertown	n/a		
Crisfield	Yes	1	2
Cumberland	n/a		
Denton Artsway	n/a		
Easton	n/a		
Elkton	n/a		
Frederick	n/a		
Frostburg	n/a		
Grantsville	Yes	1	2
Hagerstown	Yes	9	69
Havre de Grace	n/a		
Highlandtown	Yes	1	9
Leonardtown	Yes	11	75
Oakland	n/a		
Salisbury	Yes	1	90
Silver Spring	n/a		
Snow Hill	n/a		
Station North	Yes	4	214
Stevensville	Yes	2	60
Wheaton	Yes	5	341
Total	**11**	**41**	**1,192**

Sources: A&E Districts, ORPGA

As seen above, 11 of Maryland's A&E Districts reported that artist housing (and/or moderate-income housing) was available within their district's boundaries in FY 23. Overall, 41 buildings or

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complexes contained a total of 1,192 housing units. Please note that many districts reported that artist/moderate-income housing was available just outside of district boundaries. While these units are not captured in Figure 7, they would likely provide similar benefits to artists as units within districts.

Districts reported occupancy rates for several types of spaces. These rates are presented below.

Figure 8: Occupancy Rate by Real Estate Type in Maryland's A&E Districts in FY 23

District	Storefront/ Commercial	Residential	Industrial/ Manufacturing	Mixed Use
Annapolis	90%	100%	100%	95%
Bel Air	90%	99%	0%	90%
Berlin	90%	100%	0%	90%
Bethesda	80%	90%	0%	85%
Bromo Tower	96%	88%	0%	96%
Cambridge	80%	90%	0%	100%
Catonsville	98%	97%	100%	95%
Chestertown	98%	99%	100%	95%
Crisfield	50%	80%	80%	50%
Cumberland	90%	85%	80%	80%
Denton Artsway	80%	99%	70%	75%
Easton	0%	0%	0%	0%
Elkton	93%	90%	0%	95%
Frederick	90%	97%	97%	83%
Frostburg	80%	95%	0%	85%
Grantsville	25%	70%	0%	5%
Hagerstown	75%	90%	95%	70%
Havre de Grace	90%	95%	95%	90%
Highlandtown	92%	98%	83%	91%
Leonardtown	98%	98%	2%	98%
Oakland	65%	30%	0%	5%
Salisbury	90%	95%	0%	85%
Silver Spring	93%	90%	0%	83%
Snow Hill	75%	95%	0%	100%
Station North	68%	89%	61%	88%
Stevensville	80%	95%	0%	80%
Wheaton	97%	90%	0%	91%

Sources: A&E Districts

Districts reported a wide variety of occupancy rates throughout the state. Of districts that provided non-zero occupancy rates, storefront/commercial space ranged from 25 percent to 98 percent occupied; residential space ranged from 30 percent to 100 percent occupied; mixed use ranged from 5 percent to 100 percent occupied; industrial/manufacturing space ranged from 2

percent to 100 percent occupied. Of note, industrial/manufacturing space was the least common real estate type reported, with only 12 districts reporting a non-zero value for this type of space.

Figure 9: A&E District Artist Registry Information, FY 23

District	Registry?	Registered in FY 23?	Total Registered Artists	Estimated Artists
Annapolis	No			350
Bel Air	No			150
Berlin	Yes	0	17	17
Bethesda	No			1,000
Bromo Tower	Yes	31	31	350
Cambridge	No			20
Catonsville	No			75
Chestertown	No			19
Crisfield	Yes	2	129	129
Cumberland	No			60
Denton Artsway	No			20
Easton	No			250
Elkton	Yes	12	12	115
Frederick	Yes	16	366	850
Frostburg	Yes	26	65	120
Grantsville	Yes	0	6	22
Hagerstown	No			1,250
Havre de Grace	Yes	3	46	60
Highlandtown	Yes	5	81	100
Leonardtown	Yes	22	116	190
Oakland	Yes	0	3	52
Salisbury	No			160
Silver Spring	Yes	2	85	100
Snow Hill	No			50
Station North	Yes	33	33	1,000
Stevensville	Yes	20	150	130
Wheaton	No			100
Total	**14**	**172**	**1,140**	**6,739**

Sources: A&E Districts

As seen above, 14 of Maryland's A&E Districts reported that they maintained an artist registry in FY 23. Within those districts, 172 artists registered during FY 23. Station North reported the largest number of registrations in FY 23, with 33 artists. Overall, these 14 districts report that 1,140 artists are registered within their districts. Frederick, with 366 artists, reported the largest number of registered artists among districts that maintain a registry. Across all of Maryland's

A&E Districts, there are an estimated 6,739 artists working within district boundaries. Hagerstown reported the highest number of estimated artists (1,250).

Figure 10: A&E District Tax Incentive Utilization, FY 23

District	Admission and Amusement Tax abatement		Property Tax Credit applications	
	#	%	#	%
Annapolis	2	11%	0	0%
Bel Air	0	0%	0	0%
Berlin	1	5%	0	0%
Bethesda	2	11%	1	33%
Bromo Tower	1	5%	0	0%
Cambridge	0	0%	0	0%
Catonsville	0	0%	0	0%
Chestertown	2	11%	1	33%
Crisfield	0	0%	0	0%
Cumberland	0	0%	0	0%
Denton Artsway	0	0%	0	0%
Easton	0	0%	0	0%
Elkton	0	0%	0	0%
Frederick	0	0%	0	0%
Frostburg	0	0%	0	0%
Grantsville	0	0%	0	0%
Hagerstown	3	16%	0	0%
Havre de Grace	0	0%	0	0%
Highlandtown	0	0%	0	0%
Leonardtown	1	5%	0	0%
Oakland	1	5%	0	0%
Salisbury	2	11%	0	0%
Silver Spring	2	11%	0	0%
Snow Hill	0	0%	0	0%
Station North	1	5%	0	0%
Stevensville	0	0%	1	33%
Wheaton	1	5%	0	0%
Total	**19**	**100%**	**3**	**100%**

Sources: A&E Districts

As seen above, districts reported that 19 businesses abated Admission and Amusement Tax and three business applied for property tax credits in FY 23. With three businesses taking advantage of the Admission and Amusement Tax abatement, Hagerstown housed the plurality of businesses abating this tax. Three businesses in A&E Districts submitted applications for property tax credits; one business was located in Bethesda, one in Chestertown, and one in Stevensville.

In addition to tax incentives, districts provided information regarding other incentives available within their borders. Tabulations of these incentives, categorized by type, are presented below.

Figure 11: Other Incentives Available in Maryland's A&E Districts, FY 23

District	Façade	Loan	Other Tax Credit/Abatement	Grant	Other	Nonfinancial
Annapolis	0	1	3	0	0	0
Bel Air	0	0	1	2	2	2
Berlin	1	0	0	0	0	1
Bethesda	0	0	0	1	0	1
Bromo Tower	0	0	0	0	0	0
Cambridge	0	0	4	0	0	0
Catonsville	0	2	3	3	0	2
Chestertown	1	1	2	0	1	1
Crisfield	0	0	9	0	0	0
Cumberland	0	1	5	5	4	0
Denton Artsway	0	0	0	0	1	1
Easton	0	0	0	0	1	1
Elkton	0	0	0	0	0	0
Frederick	1	0	8	3	0	0
Frostburg	0	0	4	1	0	1
Grantsville	1	0	1	3	0	1
Hagerstown	0	1	4	9	1	2
Havre de Grace	0	0	0	0	1	0
Highlandtown	0	0	3	0	0	1
Leonardtown	1	0	0	0	0	1
Oakland	1	0	2	2	0	1
Salisbury	1	1	4	0	1	0
Silver Spring	0	2	2	2	3	6
Snow Hill	0	1	1	2	0	0
Station North	0	0	2	0	0	0
Stevensville	0	0	1	0	0	0
Wheaton	0	2	1	3	2	4
Total Number of Incentives	**7**	**12**	**60**	**36**	**17**	**26**
Total Districts with Incentive Type Available	**7**	**9**	**19**	**12**	**10**	**15**

Sources: A&E Districts

As seen in Figure 11, districts reported that a variety of incentives beyond Admission and Amusement Tax abatement and property tax credits were available in Maryland's A&E Districts in FY 23. The most common type of additional incentive was "other tax credits/abatements", with 19 districts reporting that there were 60 other credits/abatements available. The next-most-common incentive type reported was grants, with 12 districts reporting 36 total grants. Please note that the same incentives may be available in multiple districts and are counted separately—for example, nine districts reported that Enterprise Zone incentives were available in their borders, and these were counted as nine "other tax credit/abatement" incentives. Examples of "other" financial incentives include discounted incubator space, clean energy programs, and local general economic development support. Non-financial incentives include marketing support, parking/public transit benefits, and workshops.

Districts also provided information about the types of communication tools that they use. Tabulations of communication tools are provided below.

Figure 12: Communication Tools Used by A&E Districts, FY 23

District	Facebook	Twitter	Website	Instagram	Web Events Calendar	Artist Registry	Other
Annapolis	Yes	Yes	Yes	Yes	Yes		Yes
Bel Air	Yes		Yes	Yes	Yes		Yes
Berlin	Yes		Yes	Yes	Yes	Yes	
Bethesda	Yes	Yes	Yes	Yes	Yes		
Bromo Tower	Yes		Yes	Yes		Yes	
Cambridge	Yes		Yes				Yes
Catonsville	Yes		Yes	Yes	Yes		Yes
Chestertown	Yes		Yes	Yes	Yes		
Crisfield	Yes		Yes	Yes	Yes	Yes	Yes
Cumberland	Yes		Yes	Yes	Yes	Yes	
Denton Artsway	Yes		Yes	Yes		Yes	
Easton	Yes		Yes	Yes	Yes		
Elkton	Yes		Yes			Yes	Yes
Frederick	Yes	Yes	Yes	Yes	Yes		
Frostburg	Yes		Yes	Yes	Yes	Yes	Yes
Grantsville	Yes		Yes	Yes	Yes	Yes	
Hagerstown	Yes		Yes	Yes	Yes		
Havre de Grace	Yes		Yes	Yes			Yes
Highlandtown	Yes	Yes	Yes	Yes	Yes	Yes	
Leonardtown	Yes	Yes	Yes		Yes	Yes	Yes
Oakland	Yes		Yes		Yes	Yes	
Salisbury	Yes		Yes	Yes	Yes		
Silver Spring	Yes	Yes	Yes	Yes	Yes	Yes	
Snow Hill	Yes		Yes	Yes	Yes		Yes
Station North	Yes		Yes	Yes		Yes	
Stevensville	Yes		Yes	Yes	Yes	Yes	
Wheaton	Yes	Yes	Yes	Yes	Yes	Yes	
Total	**27**	**7**	**27**	**23**	**21**	**15**	**10**

Sources: A&E Districts

As seen above, all districts that provided annual reports indicated that they maintain a Facebook page and a website. An Instagram account was the next most common communication tool, with 23 districts reporting that they use Instagram. Examples of "other" communication tools include print materials, YouTube, email newsletters, and TikTok.

District Funding

Districts reported information on the types of funding they received in FY 23. A summary of this funding is presented in Figure 13 below. For more detailed funding information, please see the appendix.

Figure 13: A&E District Funding by Source/Type, FY 23

District	Federal	MSAC	Other State	Local	In-kind	Total
Annapolis		$16,571		$35,000		$51,571
Bel Air		$17,089		$9,004	$40,495	$66,588
Berlin		$17,000	$25,000	$6,700	$65,000	$113,700
Bethesda		$17,000				$17,000
Bromo Tower		$40,899		$50,000	$70,000	$160,899
Cambridge		$10,000		$18,900		$28,900
Catonsville		$40,899	$3,600	$195,175		$239,674
Chestertown		$40,828		$16,000		$56,828
Crisfield		$58,597	$12,500	$5,200	$19,800	$96,097
Cumberland	$30,000	$17,100		$50,000	$11,500	$108,600
Denton Artsway		$40,899		$23,281		$64,180
Easton						$0
Elkton		$66,395		$30,000	$54,500	$150,895
Frederick		$38,476	$130,000	$543,274		$711,750
Frostburg		$100,899	$42,500	$35,000		$178,399
Grantsville		$59,377		$4,500	$9,611	$73,489
Hagerstown	$25,000	$51,838		$13,800		$90,638
Havre de Grace		$69,377				$69,377
Highlandtown		$59,377	$38,000	$55,400	$251,200	$403,977
Leonardtown		$90,899	$255,980	$217,302	$15,000	$579,181
Oakland		$59,377		$5,500	$12,611	$77,489
Salisbury		$69,486	$45,000	$713,072	$56,034	$883,592
Silver Spring		$17,000		$435,000		$452,000
Snow Hill		$55,127			$10,000	$65,127
Station North		$202,377	$4,220,000	$150,000	$28,210	$4,600,587
Stevensville		$35,568		$2,000	$25,000	$62,568
Wheaton		$17,000				$17,000
Total	**$55,000**	**$1,309,454**	**$4,772,580**	**$2,614,108**	**$668,962**	**$9,420,103**

Sources: A&E Districts

Districts reported receiving over $9.4 million in funding and in-kind support in FY 23. The plurality of funding reported came from state sources other than MSAC, driven by $4.2 million awarded to Station North from the Department of General Services and the Department of Housing and Community Development. Funding from MSAC was the most common type of funding received;, all districts except Easton reported that they received MSAC funding. Examples of in-kind funding include marketing support, event security/police services, venue rentals, and administrative/staffing support.

Challenges and Technical Assistance

Districts provided narratives about the challenges facing their districts as well as the types of technical assistance (other than funding) that they feel would be beneficial. While each district is unique in its needs, several themes emerged regarding both challenges and technical assistance.

The Centers for Disease Control and Prevention (CDC) announced the end of the COVID-19 public health emergency in May 2023.[3] Not surprisingly, many districts noted challenges regarding the COVID-19 pandemic, particularly as they related to event attendance. Other challenges included finding and engaging with volunteers for the districts. Staffing and leadership changes were commonly mentioned, as were administrative or internal organizational challenges within districts. Several districts noted challenges with real estate, in terms of both available/affordable spaces and/or vacant properties depending on the district. Several districts indicated that tax incentives are difficult to navigate. A few districts mentioned weather and climate change as an increasing threat.

Requests for technical assistance often align with the challenges that districts indicated. For example, several districts requested resources to help clarify tax incentive processes, especially resources that they can share with artists/entities to help guide them through the application. Many districts requested that networking events for district leadership and site visits to districts throughout the state resume when possible. Districts also noted that assistance with marketing and community engagement could be helpful.

"Low hanging fruit" technical assistance requested includes receiving a copy of the district's annual report for the district's reference, one-pagers or other easy reference materials that outline MSAC's programming and benefits, and making an effort to schedule professional development sessions during the work week and not on Fridays to give district staff time to prepare for weekend district events.

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[3] https://www.cdc.gov/coronavirus/2019-ncov/your-health/end-of-phe.html

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Appendix: Detailed Funding Information

Figure 14: Federal Funding

District	Agency/Funder	Type of Funding	Award/Grant Amount
Cumberland	Levitt Foundation	Project Support	$30,000
Hagerstown	ARPA	Project Support	$25,000

Sources: A&E Districts

Figure 15: MSAC Funding

District	MSAC Program	Type of Funding	Award/Grant Amount
Annapolis	A&E Grant	Operating Support	$16,571
Bel Air	MSAC	Operating Support	$17,089.29
Berlin	Operating Grant	Operating Support	$17,000
Bethesda	Arts & Entertainment District Support	Operating Support	$17,000
Bromo Tower	A&E District Operating Support	Operating Support	$17,089.23
	Arts Relief Funding	Operating Support	$23,809.52
Cambridge	Network Organizational Grant	Other	$10,000
Catonsville	Arts and Entertainment Off Year	Operating Support	$17,089.28
	Arts Relief Funding	Operating Support	$23,809.52
Chestertown	A&E Operating Grant	Operating Support	$17,089.29
	A&E ARGOS Round 1	Other	$23,739
Crisfield	A&E Operating Grant	Operating Support	$17,029.29
	Arts Relief Funding	Operating Support	$23,089.53
	Arts Relief Funding	Operating Support	$18,478.26
Cumberland	A&E General Operating Support	Operating Support	$17,100
Denton Artsway	MSAC A&E	Operating Support	$17,089.29
	MSAC GFO	Operating Support	$23,809.52
Elkton	Operating Assistance Grant	Operating Support	$16,571
	Network Organizational Grant	Project Support	$7,535.88
	Arts Relief Grant	Other	$23,809.52
	Arts Relief Grant	Other	$18,478.26
Frederick	A&E District	Operating Support	$16,571
	Public Art Across America	Project Support	$10,000
	Arts Relief General Operating Support	Project Support	$11,905
Frostburg	Operating Assistance Grant	Operating Support	$17,089.29
	ARGOS FY2	Operating Support	$23,809.52
	PAAM Implementation	Project Support	$50,000
	Network Organizational Development	Project Support	$10,000
Grantsville	A&E District Funding	Operating Support	$17,089.29
	ARGOS (1)	Operating Support	$23,809.52
	ARGOS (2)	Operating Support	$18,478.26

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District	MSAC Program	Type of Funding	Award/Grant Amount
Hagerstown	Arts and Entertainment Operating Grant	Operating Support	$17,089.29
	Presenting and Touring Grant	Project Support	$5,000
	Arts Relief Funding	Project Support	$23,809.52
	Grants for Organizations - Off Year	Project Support	$5,938.80
Havre de Grace	MSAC A&E grant	Operating Support	$17,089.29
	MSAC Arts Relief grants 1 & 2	Operating Support	$42,287.79
	MSAC Public Art grant	Project Support	$10,000
Highlandtown	MSAC - A&E Operating FY23	Operating Support	$17,089.00
	MSAC Arts Relief general operating support round 1	Operating Support	$23,810.00
	MSAC Arts Relief general operating support round 2	Operating Support	$18,478.00
Leonardtown	FY23 MSAC Operating Support Grant	Operating Support	$17,089
	FY23 MSAC ARGOS Funding	Operating Support	$23,810
	FY23 Public Art (Archways) Grant	Project Support	$50,000
Oakland	A&E District Funding	Operating Support	$17,089.29
	ARGOS Funding (1)	Operating Support	$23,809.52
	ARGOS Funding (2)	Operating Support	$18,478.26
Salisbury	GFO	Project Support	$51,639.93
	Operating Grant	Operating Support	$17,846
Silver Spring	Gen Operating Grant	Operating Support	$17,000
Snow Hill	OAG	Operating Support	$17,089.00
	PAAM	Project Support	$38,038
Station North	A&E District Operating Grant	Operating Support	$40,089.28
	New Artworks Planning Grant	Project Support	$10,000
	Conservation Planning Grant	Project Support	$10,000
	Conservation Grant	Project Support	$50,000
	Special Request Grant	Project Support	$50,000
	Arts Relief Funding	Operating Support	$42,287.52
Stevensville	Arts Relief Funding	Operating Support	$18,478.26
	Operating Grant Off Year	Operating Support	$17,089.29
Wheaton	Gen Operating Grant	Operating Support	$17,000

Sources: A&E Districts

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Figure 16: Other State Funding

District	Agency/Funder	Type of Funding	Award/Grant Amount
Berlin	DHCD	Operating Support	$25,000
Catonsville	Patapsco Heritage Greenway	Project Support	$3,600
Crisfield	DHCD Circuit Rider Grant	Operating Support	$12,500
Frederick	MD DHCD	Project Support	$100,000
	MD DHCD	Project Support	$5,000
	MD DHCD	Project Support	$25,000
Frostburg	DHCD	Operating Support	$25,000
	Passages of the Western Potomac Area	Project Support	$7,500
	Maryland Humanities	Operating Support	$10,000
Highlandtown	MD DHCD Operating Assistance Grant FY23	Project Support	$8,000.00
	MD DHCD Project Restore	Operating Support	$30,000.00
	MD DHCD BRNI FY24 Patterson Park Academy of Music	Project Support	$0.00
	MD DHCD BRNI FY24 – A&E Restaurant Fit Out	Project Support	$0.00
	MD DHCD CORE FY24 - Crown Industrial Park artist studios	Project Support	$0.00
Leonardtown	FY23 EDA Tourism Grant (trolley operations)	Operating Support	$67,280
	FY23 MD Critical Areas Grant	Operating Support	$1,500
	FY23 MD State Aid for Police Protection Grant	Operating Support	$22,200
	FY23 Heritage Areas Grant - Alley Network Phase II	Project Support	$75,000
	FY23 DCHD Comm Legacy Grant (Façade Improvement)	Project Support	$50,000
	FY23 DHCD Main Street Improvement (MIP)	Operating Support	$20,000
	FY23 DHCD Technical Assistance Grant - Downtown Strategic Plan P. III	Project Support	$20,000
Salisbury	Technical Assistance Grant - DHCD For Folk Festival	Project Support	$20,000
	Main Street Improvement Grant - DHCD	Project Support	$25,000
Station North	DGS Capital Funding	Other	$2,000,000
	DHCD TAG Funding	Operating Support	$20,000
	Community Safety Works	Other	$200,000
	MD DHCD SEED	Other	$2,000,000

Sources: A&E Districts

Figure 17: Local Funding

District	Agency/Funder	Type of Funding	Award/Grant Amount
Annapolis	City of Annapolis	Operating Support	$15,000
	City of Annapolis	Project Support	$2,500
	Arts Council of Anne Arundel County	Operating Support	$7,500
	Arts Council of Anne Arundel County	Project Support	$10,000
Bel Air	Town of Bel Air Cultural Arts Commission Public Art Projects/Sponsorships	Project Support	$3,146.26
	Town of Bel Air Cultural Arts Commission Marketing, Event & Misc Support	Operating Support	$5,090.11
	Town of Bel Air Economic Development Marketing	Operating Support	$502.16
	Town of Bel Air Economic Development Web Hosting and Services	Operating Support	$265
Berlin	Worcester County Arts Council	Project Support	$2,200
	Worcester County Tourism and Economic Development	Other	$4,500
Bromo Tower	City of Baltimore Department of Planning	Operating Support	$50,000
Cambridge	City of Cambridge	Other	$18,900
Catonsville	Baltimore County Arts and Sciences Commission	Operating Support	$80,000
	Baltimore County Department of Planning	Project Support	$17,900
	Baltimore County Community Foundation	Project Support	$43,275
	Catonsville Historical Society	Project Support	$52,000
	Catonsville Women's Giving Circle	Project Support	$2,000
Chestertown	Town of Chestertown	Operating Support	$16,000
Crisfield	Somerset County Arts Council	Project Support	$3,000
	American Legion post #16	Project Support	$1,200
	American Legion post #16	Project Support	$1,000
Cumberland	City of Cumberland	Project Support	$20,000
	Allegany County Government	Project Support	$20,000
	Frostburg State University	Project Support	$10,000
Denton Artsway	Class registration fees	Project Support	$5,413
	Foundry Gallery Sales	Other	$8,540.41
	Artsway Banner Program	Project Support	$525.00

District	Agency/Funder	Type of Funding	Award/Grant Amount
	Vending sales; community festivals in A&E district	Other	$2,303
	Local government contribution	Operating Support	$6,500
Elkton	Town of Elkton	Other	$30,000
Frederick	Frederick County	Project Support	$64,000
	City of Frederick	Operating Support	$96,487
	City of Frederick	Operating Support	$172,287
	City of Frederick	Project Support	$56,000
	Frederick County Office of Economic Development	Operating Support	$5,000
	Frederick County Office of Economic Development	Project Support	$500
	Visit Frederick	Operating Support	$40,000
	Visit Frederick	Project Support	$500
	Ausherman Family Foundation	Operating Support	$40,000
	Community Foundation of Frederick County	Project Support	$5,000
	Dakota James Foundation	Project Support	$25,000
	Delpapline Foundation	Operating Support	$25,000
	Everdy Square & Shab Row	Project Support	$500
	Linton, Shafer, Warfield & Garrett	Project Support	$500
	Plamondon Hospitality Partners	Project Support	$500
	Rotary Club of Carroll Creek	Project Support	$1,000
	William E Cross Foundation	Project Support	$11,000
Frostburg	City of Frostburg	Operating Support	$30,000
	City of Frostburg	Project Support	$5,000
Grantsville	County Commissioners	Operating Support	$3,000
	Heritage Area	Project Support	$1,500
Hagerstown	Washington County Arts Council	Project Support	$5,300
	Corporate Sponsorships for IMAGINE	Project Support	$8,500
Highlandtown	Baltimore City A&E operating support FY23	Operating Support	$50,000.00
	Baltimore National Heritage Area	Project Support	$5,400.00
Leonardtown	FY23 Commissioners of Leonardtown - Trolley	Operating Support	$15,020
	FY23 Commissioners of Leonardtown (salaries, events, PR)	Operating Support	$197,282
	FY23 St. Mary's County Arts Council Dev Grants (2)	Project Support	$5,000
Oakland	County Commissioners	Operating Support	$3,000
	Heritage Area Grant	Operating Support	$2,500

District	Agency/Funder	Type of Funding	Award/Grant Amount
Salisbury	City of Salisbury (ABC Department budget)	Other	$486,563
	City of Salisbury (National Folk Festival operations)	Project Support	$226,509
Silver Spring	Montgomery County Government	Operating Support	$435,000
Station North	Baltimore City	Operating Support	$50,000
	BOPA/Mayor's Office Creative Baltimore	Operating Support	$5,000
	Johns Hopkins University	Operating Support	$30,000
	Johns Hopkins University	Project Support	$10,000
	Goldseker Foundation	Operating Support	$25,000
	William G. Baker Memorial Fund	Project Support	$20,000
	JHU Neighborhood Fund	Project Support	$7,000
	First National Bank	Project Support	$3,000
Stevensville	Queen Anne's County Arts Council Inc	Operating Support	$1,500
	Queen Anne's County Arts Council Inc.	Operating Support	$500

Sources: A&E Districts

Figure 18: In-Kind Support

District	Agency/Provider	Type of Support	Estimated Value
Bel Air	Town of Bel Air	Staff Salary	$27,495
	Town of Bel Air	Office Space & Services	$3,000
	Town of Bel Air	Police & DPW for events	$10,000
Berlin	Town of Berlin	Events, Staffing, Advertising Salary	$65,000
Bromo Tower	Downtown Partnership of Baltimore	Salary, office space	$70,000
Crisfield	City of Crisfield	Space	$12,000
	City of Crisfield	Utilities	$6,000
	City of Crisfield	A&E District Insurance	$1,800
Cumberland	City of Cumberland Police	Law enforcement services/security	$2,800
	Canal Place Preservation Development Authority	Venue rental	$6,200
	Allegany County Tourism	Marketing/Photography Services	$2,500
Elkton	Margie Blystone	Volunteer A&E Chair	$4,500
	Town of Elkton	Space, Police and Public Works	$50,000
Grantsville	GCAC	Payroll	$6,611.47
	Town of Grantsville	Town Employees' Time for Event/Festival Setup	$3,000

District	Agency/Provider	Type of Support	Estimated Value
Highlandtown	Creative Alliance	Marketing and community events	$150,000.00
	Southeast CDC	ha! Staffing	$50,000.00
	ha! Communications volunteer	produce newsletter	$1,200.00
	Nuestras raices staff time	community events	$50,000.00
Leonardtown	Leonardtown Business Association	Funding and volunteers for events	$15,000
Oakland	GCAC	Payroll	$6,611.47
	Town of Oakland	Town Employees' Time for Event/Festival Setup	$6,000
Salisbury	WMDT	Media Support	$10,180
	Delmarva Public Radio	Media Support	$1,500
	comcast/EffecTV	Media Support	$10,000
	Independent News Media	Media Support	$34,354
Snow Hill	Town of Snow Hill	Administration and Public Works	$10,000
Station North	Neighborhood Design Center	Design Services	$18,210
	Ziger | Snead	Rehab of 5 E. North Ave	$10,000
Stevensville	Commissioners of Queen Anne's County	Admin/Program Support	$25,000

Sources: A&E Districts