



MSAC
Arts and Entertainment Districts
Economic Impact Analysis

FY 2025

May 2026

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

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 (OPRGA) staff for tabulation and analysis. This report uses survey responses, secondary data sources, and the IMPLAN model to estimate the economic impacts in FY 25 (July 1, 2024 to June 30, 2025).

Economic impacts were estimated for two types of activity:

- Net employment growth of businesses
- Event/festival-goer spending

Some key takeaways from the economic impact analysis include:

Net New Business

- Net new business activity was directly responsible for an estimated 818 jobs, \$104.2 million in economic output, and \$30.8 million in employee compensation.
- When upstream supply chain activity (indirect) and household spending (induced) effects are included, the estimated impacts total 1,158 jobs, nearly \$174.9 million in economic output, and \$50.7 million in employee compensation.

Figure ES-1: Statewide Impacts of Net New Business in Maryland's A&E Districts in FY 25

| | Direct | Indirect | Induced | Total |
|-----------------------|---------------|--------------|--------------|---------------|
| Employment | 818 | 175 | 166 | 1,158 |
| Output | \$104,212,850 | \$38,358,129 | \$32,363,094 | \$174,934,073 |
| Employee Compensation | \$30,821,292 | \$10,580,538 | \$9,373,245 | \$50,775,076 |

Source: A&E Districts, IMPLAN

¹ <https://msac.org/about>

² <https://www.msac.org/programs/arts-entertainment-districts>

Event and Festival Attendee Spending

- An estimated 2.2 million people attended A&E District events and festivals in FY25.³
- Attendee spending directly supported an estimated 519 jobs, \$65.1 million in economic output, and \$20.8 million in employee compensation.
- After adding indirect and induced impacts, total employment grows to 804, economic output approaches \$109.2 million, and employee compensation exceeds \$33.6 million.

Figure ES-2: Statewide Economic Impacts of Attendee Spending at A&E District Events and Festivals in FY25

| | Direct | Indirect | Induced | Total |
|-----------------------|--------------|--------------|--------------|---------------|
| Employment | 592 | 103 | 109 | 804 |
| Output | \$65,093,983 | \$22,818,847 | \$21,324,779 | \$109,237,608 |
| Employee Compensation | \$20,833,298 | \$6,553,687 | \$6,167,420 | \$33,554,404 |

Source: A&E Districts, IMPLAN

Combined (Net New Business and Spending at Events/Festivals) Impacts

- Figure ES-3 sums the impacts presented in Figures ES-1 and ES-2 to present the combined economic impacts of net new business activity and spending at A&E District events/festivals.
- In total (direct + indirect + induced), net new business activity and spending at events/festivals within A&E Districts is associated with more than 1,900 jobs, nearly \$284 million in economic output, and over \$84 million in employee compensation.

Figure ES-3: Combined (Net New Business and Spending at Events/Festivals) Economic Impacts in FY25

| | Direct | Indirect | Induced | Total |
|-----------------------|---------------|--------------|--------------|---------------|
| Employment | 1410 | 277 | 275 | 1,962 |
| Output | \$169,306,832 | \$61,176,976 | \$53,687,872 | \$284,171,681 |
| Employee Compensation | \$51,654,590 | \$17,134,225 | \$15,540,665 | \$84,329,480 |

Source: A&E Districts, IMPLAN

³ The decrease in total visitors from FY24 is partially attributable to a change in methodology which excluded events/attendance at the Bel Air Library (1,187 events, 144,876 attendees) as reported numbers included virtual attendance. Virtual attendees are generally not spending money with the A&E District which may have exaggerated spending estimates in past years. Should in-person and virtual attendance be distinguished in future reports, Bel Air Library events may be included in future economic impact reports.

Events at the Wheaton Recreation Center were also excluded as they totaled approximately 900 events but did not include attendance figures. Those 900 events would have represented ~13% of total reported events, which would skew attendance estimates (~140,000 attendees). Using our previous methodology would likely overstate the spending estimates for Wheaton while driving down the estimated attendance across other districts, as the estimated attendance is based on the average attendance across all “event” classified activities. Should attendance figures be included in future reporting, Wheaton Recreation Center events may be included in future economic impact reports.

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.

As part of its mission, MSAC runs 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. Each district is required to submit an annual report to MSAC which describes their activity over the prior year. MSAC has shared these reports with Commerce's Office of Research, Policy, and Government Affairs (ORPGA) for tabulation and analysis.

This document contains an economic impact analysis of net employment growth and spending at events and festivals. Impacts describe activity within the 27 A&E Districts that completed their FY 25 annual report. Inputs for the economic impact analysis were developed based on information provided by the districts as well as secondary data sources.

Please note that ORPGA did not generally 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 25), 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 25 (Please also see footnote #3)

Economic Impacts of Net New Business

To estimate the impacts of net new businesses, ORPGA used information provided in the A&E Districts' annual reports. In these reports, districts were asked to provide information on businesses, including the type of business and the number of employees, that opened or closed during FY 25. ORPGA used this information to develop inputs for the IMPLAN model. To estimate net new business, the number of employees at businesses that closed was subtracted from the number of employees at businesses that opened. As such, it is possible for a district to have negative net employment impacts if employment at businesses that closed exceeded employment at businesses that opened in the fiscal year.

In cases where a district did not provide employment counts, ORPGA used the median number of employees at businesses for which employment was provided, which was 3 employees. The impacts associated with net new employment at Maryland's A&E Districts are presented below. For additional information on the methodology, please see the methodology appendix. For district-level impacts, please see the data appendix. Please note that totals may not sum due to rounding.

Figure 1: Statewide Impacts of Net New Business in Maryland's A&E Districts in FY 25

| | Direct | Indirect | Induced | Total |
|------------------------------|---------------|--------------|--------------|---------------|
| Employment | 819 | 174 | 165 | 1,158 |
| Output | \$104,226,013 | \$38,409,521 | \$32,279,289 | \$174,914,822 |
| Employee Compensation | \$30,776,926 | \$10,578,704 | \$9,348,991 | \$50,704,621 |

Source: A&E Districts, IMPLAN

After accounting for closures, A&E District businesses added 819 employees in FY 25 (direct effects). This activity supported 174 additional jobs through upstream supply-chain purchases (indirect effects). Both direct and indirect employees spend a portion of their income on a variety of goods and services; this activity supported employment for an additional 165 workers (induced effects). In total, net new business activity in A&E Districts was associated with 1,158 jobs.

Direct output was over \$104.2 million, while direct employee compensation was nearly \$30.8 million. When secondary effects are considered, total output was nearly \$175 million, while total employee compensation exceeded \$50.7 million.

Economic Impacts of Spending at Events and Festivals

Impacts of visitor spending is based on attendance at district events and festivals. All districts were asked to provide information on events and festivals held within their boundaries in FY 25, and many districts included estimated attendance for these events and festivals. In cases where no attendance figures were provided, average attendance from available events/festivals were used as inputs (177 attendees at events; 2,615 attendees at festivals). Across all districts, there were an estimated 1.2 million attendees at events and 939,000 attendees at festivals, for a total of 2.2 million attendees.

To develop inputs for the IMPLAN model, spending estimates from the *Arts and Economic Prosperity 6* report from Americans for the Arts were utilized.⁴ This report includes a survey of attendees at arts and culture events. It presents spending estimates for attendees of arts and culture events based on attendee type: local, non-local, and non-local visitor specifically to the arts event. These per-attendee spending figures were used to develop spending estimates for the IMPLAN model based on attendance figures provided by A&E Districts.

These impacts are presented in two different ways:

- Impacts of spending by all attendees at A&E District events and festivals
- Impacts of spending by non-local visitors who traveled specifically for the event or festival

As seen in Figure 2, spending associated with all 2.2 million attendees at A&E District events and festivals in FY 25 supported 804 jobs, \$109.2 million in output, and \$33.5 million in employee compensation. Most of the impact stems from direct activity (i.e. spending that these attendees engaged in outside of the event or festival, for example, hotel rooms or meals).

⁴ https://aep6.americansforthearts.org/resources/media/user/1696872054-AEP6_National_Findings_Full_Report-Proof_final-web.pdf (pages 17-19)

Figure 2: Economic Impact of Attendee Spending at A&E District Events and Festivals in FY 25

| | Direct | Indirect | Induced | Total |
|-----------------------|--------------|--------------|--------------|---------------|
| Employment | 592 | 103 | 109 | 804 |
| Output | \$65,093,983 | \$22,818,847 | \$21,324,779 | \$109,237,608 |
| Employee Compensation | \$20,833,298 | \$6,553,687 | \$6,167,420 | \$33,554,404 |

Source: A&E Districts, IMPLAN

While the overall impacts are useful information, it is also important to recognize impacts associated with attendees who traveled to the region for the specific purpose of attending the event or festival. In the *Americans for the Arts* survey, approximately 23.1 percent of respondents were non-local visitors who traveled explicitly to attend events/festivals. These non-local visitors typically spend more while attending events and festivals; this includes elevated expenditures on lodging, food, and local transportation. Consequently, non-local visitors account for roughly 25.4 percent of spending.

Figure 3 shows that economic activity associated with visitor spending at A&E District events and festivals in FY 25 has a total impact of 204 jobs, \$27.7 million in output, and \$8.5 million in employee compensation. Most of the total impact comes from direct impacts, which stem from the visitor spending itself (e.g., visitor hotel rooms or meals).

Figure 3: Economic Impact of Non-local Visitor Spending at A&E District Events and Festivals in FY 25

| | Direct | Indirect | Induced | Total |
|-----------------------|--------------|-------------|-------------|--------------|
| Employment | 150 | 26 | 28 | 204 |
| Output | \$16,516,968 | \$5,790,061 | \$5,410,956 | \$27,717,985 |
| Employee Compensation | \$5,286,248 | \$1,662,934 | \$1,564,923 | \$8,514,105 |

Source: A&E Districts, IMPLAN

Appendix A: Data Appendix

Appendix A.1: Input Data

Figure 4: Estimated Total Attendance and Non-Local Visitor Counts at Events and Festivals in Maryland's A&E Districts in FY 25

| District | Total Attendees | Non-local |
|-----------------------|------------------|-------------------------|
| | | Visitors to Arts Events |
| Annapolis | 42,920 | 9,915 |
| Bel Air | 164,877 | 38,087 |
| Berlin | 66,677 | 15,402 |
| Bethesda | 82,100 | 18,965 |
| Bromo | 217,490 | 50,240 |
| Cambridge | 36,416 | 8,412 |
| Catonsville | 93,128 | 21,513 |
| Chestertown | 49,563 | 11,449 |
| Crisfield | 23,228 | 5,366 |
| Cumberland | 40,216 | 9,290 |
| Denton | 15,690 | 3,624 |
| Easton | 67,900 | 15,685 |
| Elkton | 19,710 | 4,553 |
| Frederick | 287,522 | 66,418 |
| Frostburg | 29,765 | 6,876 |
| Grantsville | 13,700 | 3,165 |
| Hagerstown | 25,346 | 5,855 |
| Havre de Grace | 136,298 | 31,485 |
| Highlandtown | 111,842 | 25,836 |
| Leonardtown | 65,910 | 15,225 |
| Oakland | 28,277 | 6,532 |
| Penn Ave (Black Arts) | 2,770 | 640 |
| Salisbury | 40,170 | 9,279 |
| Stevensville | 3,755 | 867 |
| Silver Spring | 200,000 | 46,200 |
| Snow Hill | 16,657 | 3,848 |
| Station North | 199,294 | 46,037 |
| Wheaton | 120,651 | 27,870 |
| Total | 2,201,872 | 508,632 |

Source: A&E Districts, ORPGA

Figure 5: Attendee Breakdown by Category from the Arts and Economic Prosperity 6 Report

| Category | Percentage |
|--|---------------|
| Local Attendee | 70.0% |
| Non-local Visitor | 6.9% |
| Non-local Visitor who Traveled Specifically for the Arts Event | 23.1% |
| Total | 100.0% |

Source: Americans for the Arts, ORPGA

Figure 6: Weighted Average Spending Estimates for Attendees at A&E District Events and Festivals in FY 25

| Category | Weighted Average |
|---------------------|------------------|
| Offsite Food/Drink | \$14.72 |
| Retail | \$6.56 |
| Overnight Lodging | \$5.20 |
| Local transport | \$4.16 |
| Clothes/Accessories | \$3.18 |
| Supplies/Groceries | \$3.04 |
| Childcare | \$0.64 |
| Other | \$1.51 |
| Total | \$39.01 |

Source: Americans for the Arts, ORPGA

Appendix A.2: Net New Business Impacts

Figures 7, 8, and 9 examine the economic impacts of net new business within each A&E District. Specifically, net-change in employment was used as the input to IMPLAN. Note that the totals in each district-level table match the summary table (Figure 1).

Figure 7: District-level Employment Impacts of Net New Business in Maryland's A&E Districts in FY 25

| District | Direct | Indirect | Induced | Total |
|-----------------------|------------|------------|------------|--------------|
| Annapolis | 20 | 3 | 3 | 26 |
| Bel Air | 32 | 6 | 6 | 44 |
| Berlin | 33 | 5 | 6 | 44 |
| Bethesda | 174 | 38 | 33 | 245 |
| Penn Ave (Black Arts) | 0 | 0 | 0 | 0 |
| Bromo Tower | 6 | 1 | 1 | 8 |
| Cambridge | 9 | 2 | 2 | 13 |
| Catonsville | 46 | 12 | 15 | 73 |
| Chestertown | 8 | 4 | 2 | 13 |
| Crisfield | 36 | 6 | 8 | 50 |
| Cumberland | 23 | 7 | 5 | 36 |
| Denton Artsway | 9 | 2 | 1 | 12 |
| Easton | 61 | 11 | 10 | 82 |
| Elkton | 26 | 4 | 5 | 35 |
| Frederick | 51 | 15 | 13 | 79 |
| Frostburg | 21 | 5 | 4 | 29 |
| Grantsville | 7 | 1 | 2 | 10 |
| Hagerstown | 36 | 9 | 7 | 53 |
| Havre de Grace | 21 | 4 | 3 | 28 |
| Highlandtown | 72 | 13 | 12 | 97 |
| Leonardtwn | 34 | 7 | 7 | 48 |
| Oakland | -5 | -1 | -1 | -7 |
| Salisbury | 45 | 10 | 11 | 66 |
| Silver Spring | 21 | 5 | 3 | 29 |
| Snow Hill | 13 | 3 | 2 | 18 |
| Station North | 12 | 2 | 2 | 17 |
| Stevensville | 9 | 2 | 2 | 13 |
| Wheaton | 18 | 3 | 3 | 23 |
| Total | 818 | 175 | 166 | 1,158 |

Source: A&E Districts, IMPLAN, ORPGA

Figure 8: District-Level Output Impacts of Net New Business in Maryland's A&E Districts in FY 25

| District | Direct | Indirect | Induced | Total |
|------------------------------------|----------------------|---------------------|---------------------|----------------------|
| Annapolis | \$1,960,865 | \$709,546 | \$608,832 | \$3,279,243 |
| Bel Air | \$3,838,797 | \$1,278,299 | \$1,182,170 | \$6,299,266 |
| Berlin | \$3,851,960 | \$1,329,691 | \$1,098,365 | \$6,280,016 |
| Bethesda | \$21,184,475 | \$8,292,784 | \$6,376,672 | \$35,853,931 |
| Penn Ave (Black Arts) ⁵ | \$- | \$- | \$- | \$- |
| Bromo Tower | \$755,402 | \$347,836 | \$188,428 | \$1,291,666 |
| Cambridge | \$844,054 | \$313,518 | \$457,681 | \$1,615,253 |
| Catonsville | \$6,575,700 | \$2,622,170 | \$2,850,542 | \$12,048,411 |
| Chestertown | \$1,404,096 | \$767,893 | \$318,036 | \$2,490,026 |
| Crisfield | \$4,003,138 | \$1,495,706 | \$1,603,148 | \$7,101,992 |
| Cumberland | \$3,049,600 | \$1,460,983 | \$1,061,186 | \$5,571,768 |
| Denton Artsway | \$1,000,014 | \$392,608 | \$286,890 | \$1,679,512 |
| Easton | \$6,433,562 | \$2,647,868 | \$1,897,635 | \$10,979,064 |
| Elkton | \$3,357,552 | \$779,513 | \$1,021,115 | \$5,158,180 |
| Frederick | \$10,100,540 | \$3,233,043 | \$2,581,612 | \$15,915,195 |
| Frostburg | \$2,120,574 | \$983,094 | \$720,549 | \$3,824,216 |
| Grantsville | \$962,958 | \$316,930 | \$338,364 | \$1,618,253 |
| Hagerstown | \$6,750,481 | \$2,267,086 | \$1,440,732 | \$10,458,299 |
| Havre de Grace | \$2,160,169 | \$782,361 | \$632,405 | \$3,574,935 |
| Highlandtown | \$7,382,312 | \$2,579,436 | \$2,358,726 | \$12,320,473 |
| Leonardtwn | \$4,440,378 | \$1,361,361 | \$1,409,952 | \$7,211,691 |
| Oakland | \$(535,905) | \$(182,460) | \$(160,165) | \$(878,530) |
| Salisbury | \$6,679,479 | \$2,221,198 | \$2,226,263 | \$11,126,940 |
| Silver Spring | \$2,266,470 | \$1,082,326 | \$630,105 | \$3,978,901 |
| Snow Hill | \$1,006,579 | \$565,287 | \$396,543 | \$1,968,409 |
| Station North | \$1,539,729 | \$455,067 | \$480,629 | \$2,475,425 |
| Stevensville | \$1,175,278 | \$379,705 | \$405,496 | \$1,960,480 |
| Wheaton | \$1,865,458 | \$584,827 | \$560,015 | \$3,010,300 |
| Total | \$104,212,850 | \$38,358,129 | \$32,363,094 | \$174,934,073 |

Source: A&E Districts, IMPLAN, ORPGA

⁵ Pennsylvania Avenue Black Arts District did not provide any business opening or closing data.

Figure 9: District-Level Employee Compensation Impacts of Net New Businesses in Maryland's A&E Districts in FY 25

| District | Direct | Indirect | Induced | Total |
|-----------------------|---------------------|---------------------|--------------------|---------------------|
| Annapolis | \$606,012 | \$192,977 | \$176,078 | \$975,066 |
| Bel Air | \$1,147,396 | \$355,944 | \$341,905 | \$1,845,244 |
| Berlin | \$1,103,029 | \$354,109 | \$317,651 | \$1,774,789 |
| Bethesda | \$5,856,336 | \$2,312,623 | \$1,844,227 | \$10,013,186 |
| Penn Ave (Black Arts) | \$- | \$- | \$- | \$- |
| Bromo Tower | \$127,639 | \$78,705 | \$53,033 | \$259,377 |
| Cambridge | \$471,428 | \$98,593 | \$132,370 | \$702,391 |
| Catonsville | \$2,826,278 | \$821,169 | \$824,414 | \$4,471,861 |
| Chestertown | \$187,582 | \$191,831 | \$91,989 | \$471,402 |
| Crisfield | \$1,622,892 | \$428,829 | \$463,652 | \$2,515,373 |
| Cumberland | \$877,887 | \$395,095 | \$306,933 | \$1,579,916 |
| Denton Artsway | \$273,609 | \$109,403 | \$82,968 | \$465,981 |
| Easton | \$1,871,622 | \$725,501 | \$563,611 | \$3,160,735 |
| Elkton | \$1,121,187 | \$214,387 | \$295,314 | \$1,630,888 |
| Frederick | \$2,423,325 | \$903,937 | \$746,633 | \$4,073,895 |
| Frostburg | \$612,420 | \$240,014 | \$208,412 | \$1,060,846 |
| Grantsville | \$365,179 | \$92,843 | \$97,853 | \$555,875 |
| Hagerstown | \$1,407,544 | \$607,611 | \$416,635 | \$2,431,790 |
| Havre de Grace | \$584,504 | \$219,141 | \$182,902 | \$986,547 |
| Highlandtown | \$2,098,050 | \$696,060 | \$682,241 | \$3,476,351 |
| Leonardtown | \$1,359,025 | \$365,602 | \$407,804 | \$2,132,431 |
| Oakland | \$(162,797) | \$(49,841) | \$(46,320) | \$(258,958) |
| Salisbury | \$2,429,476 | \$609,954 | \$643,813 | \$3,683,243 |
| Silver Spring | \$509,506 | \$276,440 | \$182,241 | \$968,188 |
| Snow Hill | \$282,712 | \$161,704 | \$114,704 | \$559,120 |
| Station North | \$434,129 | \$112,961 | \$139,024 | \$686,114 |
| Stevensville | \$440,832 | \$107,164 | \$117,267 | \$665,263 |
| Wheaton | \$550,501 | \$150,757 | \$161,969 | \$863,227 |
| Total | \$30,821,292 | \$10,580,538 | \$9,373,245 | \$50,775,076 |

Source: A&E Districts, IMPLAN, ORPGA

Appendix A.3: Impacts of Total Attendance at A&E District Events and Festivals

Figures 10, 11, and 12 examine the economic impacts of spending by all attendees (locals and nonlocals) of A&E District events and festivals. Note that the totals in each district-level table match the summary table (Figure 2).

Figure 10: Employment Impacts of Total Attendance at A&E District Events and Festivals in FY 25

| District | Direct | Indirect | Induced | Total |
|-----------------------|------------|------------|------------|------------|
| Annapolis | 11.53 | 2.00 | 2.13 | 15.66 |
| Bel Air | 44.31 | 7.68 | 8.18 | 60.17 |
| Berlin | 17.92 | 3.10 | 3.31 | 24.33 |
| Bethesda | 22.06 | 3.82 | 4.07 | 29.96 |
| Penn Ave (Black Arts) | 0.74 | 0.13 | 0.14 | 1.01 |
| Bromo Tower | 58.45 | 10.13 | 10.79 | 79.37 |
| Cambridge | 9.79 | 1.70 | 1.81 | 13.29 |
| Catonsville | 25.03 | 4.34 | 4.62 | 33.99 |
| Chestertown | 13.32 | 2.31 | 2.46 | 18.09 |
| Crisfield | 6.24 | 1.08 | 1.15 | 8.48 |
| Cumberland | 10.81 | 1.87 | 2.00 | 14.68 |
| Denton Artsway | 4.22 | 0.73 | 0.78 | 5.73 |
| Easton | 18.25 | 3.16 | 3.37 | 24.78 |
| Elkton | 5.30 | 0.92 | 0.98 | 7.19 |
| Frederick | 77.27 | 13.39 | 14.26 | 104.93 |
| Frostburg | 8.00 | 1.39 | 1.48 | 10.86 |
| Grantsville | 3.68 | 0.64 | 0.68 | 5.00 |
| Hagerstown | 6.81 | 1.18 | 1.26 | 9.25 |
| Havre de Grace | 36.63 | 6.35 | 6.76 | 49.74 |
| Highlandtown | 30.06 | 5.21 | 5.55 | 40.81 |
| Leonardtwn | 17.71 | 3.07 | 3.27 | 24.05 |
| Oakland | 7.60 | 1.32 | 1.40 | 10.32 |
| Salisbury | 10.80 | 1.87 | 1.99 | 14.66 |
| Silver Spring | 53.75 | 9.31 | 9.92 | 72.99 |
| Snow Hill | 4.48 | 0.78 | 0.83 | 6.08 |
| Station North | 53.56 | 9.28 | 9.89 | 72.73 |
| Stevensville | 1.01 | 0.17 | 0.19 | 1.37 |
| Wheaton | 32.43 | 5.62 | 5.99 | 44.03 |
| Total | 592 | 103 | 109 | 804 |

Source: A&E Districts, IMPLAN, ORPGA

Figure 11: Output Impacts of Total Attendance at A&E District Events and Festivals in FY 25

| District | Direct | Indirect | Induced | Total |
|-----------------------|---------------------|---------------------|---------------------|----------------------|
| Annapolis | \$1,268,845 | \$444,796 | \$415,673 | \$2,129,315 |
| Bel Air | \$4,874,262 | \$1,708,684 | \$1,596,807 | \$8,179,753 |
| Berlin | \$1,971,173 | \$690,999 | \$645,756 | \$3,307,929 |
| Bethesda | \$2,427,124 | \$850,834 | \$795,125 | \$4,073,083 |
| Penn Ave (Black Arts) | \$81,890 | \$28,707 | \$26,827 | \$137,423 |
| Bromo Tower | \$6,429,661 | \$2,253,933 | \$2,106,356 | \$10,789,949 |
| Cambridge | \$1,076,567 | \$377,393 | \$352,683 | \$1,806,643 |
| Catonsville | \$2,753,145 | \$965,121 | \$901,930 | \$4,620,196 |
| Chestertown | \$1,465,232 | \$513,640 | \$480,010 | \$2,458,882 |
| Crisfield | \$686,690 | \$240,721 | \$224,959 | \$1,152,370 |
| Cumberland | \$1,188,906 | \$416,774 | \$389,486 | \$1,995,166 |
| Denton Artsway | \$463,844 | \$162,602 | \$151,955 | \$778,400 |
| Easton | \$2,007,329 | \$703,674 | \$657,601 | \$3,368,603 |
| Elkton | \$582,687 | \$204,262 | \$190,888 | \$977,838 |
| Frederick | \$8,500,018 | \$2,979,701 | \$2,784,605 | \$14,264,324 |
| Frostburg | \$879,943 | \$308,466 | \$288,269 | \$1,476,679 |
| Grantsville | \$405,013 | \$141,978 | \$132,682 | \$679,674 |
| Hagerstown | \$749,304 | \$262,670 | \$245,472 | \$1,257,447 |
| Havre de Grace | \$4,029,380 | \$1,412,509 | \$1,320,024 | \$6,761,913 |
| Highlandtown | \$3,306,387 | \$1,159,062 | \$1,083,172 | \$5,548,621 |
| Leonardtown | \$1,948,499 | \$683,051 | \$638,328 | \$3,269,877 |
| Oakland | \$835,953 | \$293,045 | \$273,858 | \$1,402,857 |
| Salisbury | \$1,187,546 | \$416,297 | \$389,040 | \$1,992,884 |
| Silver Spring | \$5,912,604 | \$2,072,677 | \$1,936,968 | \$9,922,249 |
| Snow Hill | \$492,431 | \$172,623 | \$161,320 | \$826,374 |
| Station North | \$5,891,732 | \$2,065,360 | \$1,930,131 | \$9,887,223 |
| Stevensville | \$111,009 | \$38,915 | \$36,367 | \$186,290 |
| Wheaton | \$3,566,808 | \$1,250,353 | \$1,168,486 | \$5,985,646 |
| Total | \$65,093,983 | \$22,818,847 | \$21,324,779 | \$109,237,608 |

Source: A&E Districts, IMPLAN, ORPGA

Figure 12: Employee Compensation Impacts of Total Attendance at A&E District Events and Festivals in FY 25

| District | Direct | Indirect | Induced | Total |
|-----------------------|---------------------|--------------------|--------------------|---------------------|
| Annapolis | \$406,093 | \$127,748 | \$120,218 | \$654,059 |
| Bel Air | \$1,560,005 | \$490,743 | \$461,819 | \$2,512,566 |
| Berlin | \$630,873 | \$198,458 | \$186,762 | \$1,016,093 |
| Bethesda | \$776,800 | \$244,364 | \$229,961 | \$1,251,125 |
| Penn Ave (Black Arts) | \$26,209 | \$8,245 | \$7,759 | \$42,212 |
| Bromo Tower | \$2,057,810 | \$647,341 | \$609,187 | \$3,314,338 |
| Cambridge | \$344,555 | \$108,389 | \$102,001 | \$554,945 |
| Catonsville | \$881,143 | \$277,188 | \$260,851 | \$1,419,181 |
| Chestertown | \$468,947 | \$147,520 | \$138,825 | \$755,292 |
| Crisfield | \$219,775 | \$69,136 | \$65,061 | \$353,972 |
| Cumberland | \$380,509 | \$119,700 | \$112,645 | \$612,853 |
| Denton Artsway | \$148,453 | \$46,700 | \$43,948 | \$239,100 |
| Easton | \$642,445 | \$202,099 | \$190,187 | \$1,034,730 |
| Elkton | \$186,489 | \$58,665 | \$55,207 | \$300,361 |
| Frederick | \$2,720,427 | \$855,785 | \$805,346 | \$4,381,558 |
| Frostburg | \$281,625 | \$88,593 | \$83,371 | \$453,590 |
| Grantsville | \$129,624 | \$40,777 | \$38,374 | \$208,775 |
| Hagerstown | \$239,814 | \$75,440 | \$70,994 | \$386,249 |
| Havre de Grace | \$1,289,601 | \$405,680 | \$381,769 | \$2,077,050 |
| Highlandtown | \$1,058,208 | \$332,888 | \$313,268 | \$1,704,364 |
| Leonardtwn | \$623,616 | \$196,176 | \$184,613 | \$1,004,405 |
| Oakland | \$267,547 | \$84,164 | \$79,204 | \$430,914 |
| Salisbury | \$380,074 | \$119,563 | \$112,516 | \$612,152 |
| Silver Spring | \$1,892,326 | \$595,283 | \$560,198 | \$3,047,807 |
| Snow Hill | \$157,602 | \$49,578 | \$46,656 | \$253,837 |
| Station North | \$1,885,646 | \$593,182 | \$558,220 | \$3,037,048 |
| Stevensville | \$35,528 | \$11,176 | \$10,518 | \$57,223 |
| Wheaton | \$1,141,555 | \$359,108 | \$337,942 | \$1,838,605 |
| Total | \$20,833,298 | \$6,553,687 | \$6,167,420 | \$33,554,404 |

Source: A&E Districts, IMPLAN, ORPGA

Appendix A.4: Non-Local Visitor Spending Impacts

Figures 13, 14, and 15 examine the economic impacts of spending by non-local visitors who travel explicitly for arts events. Note that the totals in each district-level table match the summary table (Figure 3).

Figure 13: Employment Impacts of Non-Local Visitor Spending at A&E District Events and Festivals in FY 25

| District | Direct | Indirect | Induced | Total |
|---------------------|------------|-----------|-----------|------------|
| Annapolis | 3 | 1 | 1 | 4 |
| Bel Air | 11 | 2 | 2 | 15 |
| Berlin | 5 | 1 | 1 | 6 |
| Bethesda | 6 | 1 | 1 | 8 |
| Black Arts District | 0 | 0 | 0 | 0 |
| Bromo Tower | 15 | 3 | 3 | 20 |
| Cambridge | 2 | 0 | 0 | 3 |
| Catonsville | 6 | 1 | 1 | 9 |
| Chestertown | 3 | 1 | 1 | 5 |
| Crisfield | 2 | 0 | 0 | 2 |
| Cumberland | 3 | 0 | 1 | 4 |
| Denton Artsway | 1 | 0 | 0 | 1 |
| Easton | 5 | 1 | 1 | 6 |
| Elkton | 1 | 0 | 0 | 2 |
| Frederick | 20 | 3 | 4 | 27 |
| Frostburg | 2 | 0 | 0 | 3 |
| Grantsville | 1 | 0 | 0 | 1 |
| Hagerstown | 2 | 0 | 0 | 2 |
| Havre de Grace | 9 | 2 | 2 | 13 |
| Highlandtown | 8 | 1 | 1 | 10 |
| Leonardtown | 4 | 1 | 1 | 6 |
| Oakland | 2 | 0 | 0 | 3 |
| Salisbury | 3 | 0 | 1 | 4 |
| Silver Spring | 14 | 2 | 3 | 19 |
| Snow Hill | 1 | 0 | 0 | 2 |
| Station North | 14 | 2 | 3 | 18 |
| Stevensville | 0 | 0 | 0 | 0 |
| Wheaton | 8 | 1 | 2 | 11 |
| Total | 150 | 26 | 28 | 204 |

Source: A&E Districts, IMPLAN, ORPGA

Figure 14: Output Impacts of Non-Local Visitor Spending at A&E District Events and Festivals in FY 25

| District | Direct | Indirect | Induced | Total |
|---------------------|---------------------|--------------------|--------------------|---------------------|
| Annapolis | \$321,957 | \$112,863 | \$105,473 | \$540,293 |
| Bel Air | \$1,236,797 | \$433,562 | \$405,174 | \$2,075,533 |
| Berlin | \$500,166 | \$175,334 | \$163,854 | \$839,355 |
| Bethesda | \$615,859 | \$215,891 | \$201,755 | \$1,033,505 |
| Black Arts District | \$20,779 | \$7,284 | \$6,807 | \$34,870 |
| Bromo Tower | \$1,631,464 | \$571,914 | \$534,467 | \$2,737,845 |
| Cambridge | \$273,168 | \$95,760 | \$89,490 | \$458,418 |
| Catonsville | \$698,584 | \$244,890 | \$228,856 | \$1,172,330 |
| Chestertown | \$371,788 | \$130,331 | \$121,798 | \$623,918 |
| Crisfield | \$174,241 | \$61,081 | \$57,081 | \$292,403 |
| Cumberland | \$301,673 | \$105,752 | \$98,828 | \$506,254 |
| Denton Artsway | \$117,696 | \$41,259 | \$38,557 | \$197,512 |
| Easton | \$509,340 | \$178,550 | \$166,860 | \$854,750 |
| Elkton | \$147,851 | \$51,830 | \$48,436 | \$248,117 |
| Frederick | \$2,156,797 | \$756,070 | \$706,566 | \$3,619,434 |
| Frostburg | \$223,277 | \$78,270 | \$73,146 | \$374,693 |
| Grantsville | \$102,768 | \$36,026 | \$33,667 | \$172,461 |
| Hagerstown | \$190,129 | \$66,650 | \$62,286 | \$319,065 |
| Havre de Grace | \$1,022,416 | \$358,410 | \$334,943 | \$1,715,770 |
| Highlandtown | \$838,964 | \$294,101 | \$274,844 | \$1,407,909 |
| Leonardtwn | \$494,413 | \$173,317 | \$161,970 | \$829,700 |
| Oakland | \$212,115 | \$74,357 | \$69,489 | \$355,961 |
| Salisbury | \$301,328 | \$105,631 | \$98,715 | \$505,675 |
| Silver Spring | \$1,500,266 | \$525,922 | \$491,487 | \$2,517,675 |
| Snow Hill | \$124,950 | \$43,801 | \$40,933 | \$209,685 |
| Station North | \$1,494,970 | \$524,065 | \$489,752 | \$2,508,787 |
| Stevensville | \$28,167 | \$9,874 | \$9,228 | \$47,269 |
| Wheaton | \$905,043 | \$317,265 | \$296,492 | \$1,518,800 |
| Total | \$16,516,968 | \$5,790,061 | \$5,410,956 | \$27,717,985 |

Source: A&E Districts, IMPLAN, ORPGA

Figure 15: Employee Compensation Impacts of Non-Local Visitor Spending at A&E District Events and Festivals in FY 25

| District | Direct | Indirect | Induced | Total |
|---------------------|--------------------|--------------------|--------------------|--------------------|
| Annapolis | \$103,042 | \$32,415 | \$30,504 | \$165,961 |
| Bel Air | \$395,836 | \$124,521 | \$117,182 | \$637,539 |
| Berlin | \$160,078 | \$50,357 | \$47,389 | \$257,824 |
| Bethesda | \$197,105 | \$62,005 | \$58,350 | \$317,461 |
| Black Arts District | \$6,650 | \$2,092 | \$1,969 | \$10,711 |
| Bromo Tower | \$522,149 | \$164,256 | \$154,575 | \$840,981 |
| Cambridge | \$87,427 | \$27,503 | \$25,882 | \$140,812 |
| Catonsville | \$223,581 | \$70,334 | \$66,188 | \$360,103 |
| Chestertown | \$118,991 | \$37,432 | \$35,226 | \$191,648 |
| Crisfield | \$55,766 | \$17,543 | \$16,509 | \$89,817 |
| Cumberland | \$96,550 | \$30,373 | \$28,582 | \$155,506 |
| Denton Artsway | \$37,669 | \$11,850 | \$11,151 | \$60,669 |
| Easton | \$163,014 | \$51,281 | \$48,258 | \$262,553 |
| Elkton | \$47,320 | \$14,886 | \$14,008 | \$76,214 |
| Frederick | \$690,282 | \$217,147 | \$204,349 | \$1,111,778 |
| Frostburg | \$71,460 | \$22,480 | \$21,155 | \$115,094 |
| Grantsville | \$32,891 | \$10,347 | \$9,737 | \$52,975 |
| Hagerstown | \$60,851 | \$19,142 | \$18,014 | \$98,007 |
| Havre de Grace | \$327,224 | \$102,937 | \$96,870 | \$527,031 |
| Highlandtown | \$268,510 | \$84,467 | \$79,489 | \$432,466 |
| Leonardtwn | \$158,237 | \$49,778 | \$46,844 | \$254,858 |
| Oakland | \$67,887 | \$21,356 | \$20,097 | \$109,340 |
| Salisbury | \$96,440 | \$30,338 | \$28,550 | \$155,328 |
| Silver Spring | \$480,159 | \$151,047 | \$142,145 | \$773,351 |
| Snow Hill | \$39,990 | \$12,580 | \$11,839 | \$64,409 |
| Station North | \$478,464 | \$150,514 | \$141,643 | \$770,622 |
| Stevensville | \$9,015 | \$2,836 | \$2,669 | \$14,520 |
| Wheaton | \$289,659 | \$91,120 | \$85,750 | \$466,528 |
| Total | \$5,286,248 | \$1,662,934 | \$1,564,923 | \$8,514,105 |

Source: A&E Districts, IMPLAN, ORPGA

Appendix B: Methodology Appendix

Appendix B.1: Detailed Methods

This project consisted of two separate reports for MSAC: a survey analysis, which involved tabulations of data gleaned from A&E District annual reports, and an economic impact analysis, which is presented in this document. The economic impact analysis was based upon methodologies from past impact reports.

The first component of the impact analysis considered net new business activity in A&E Districts in FY 25 using employment growth. Districts were asked to provide information on the businesses by type that opened or closed within their borders in FY 25 and to provide employment totals for these businesses. Please note that ORPGA did not systematically validate the data. In cases where there were noticeable errors (for example, a business listed as both a retailer and a restaurant), line-item corrections were made. For districts that did not provide employment figures (or that provided incomplete employment figures), the median employment number for all businesses in all districts (3 employees) was utilized. To conduct the IMPLAN analysis, net employment growth (that is, employees added at new businesses less employees lost at closed businesses) was entered into the IMPLAN model based on IMPLAN codes assigned by ORPGA.

The second component of the impact analysis considered spending by attendees at events and festivals held within A&E Districts in FY 25. Districts were asked to provide information on the number of events and festivals as well as estimated attendance. Please note that ORPGA did not systematically validate the data. In cases where there were noticeable errors (for example, an event was listed with dates that fell outside of FY 25), line-item corrections were made.⁶ For districts that did not provide estimated attendance information, the average attendance of events or festivals with data (approximately 177 attendees at events and 2,615 attendees at festivals) was utilized.

Survey data from the Americans for the Arts report *Arts and Economic Prosperity 6 (AEP 6)* was used to develop inputs to the IMPLAN model.⁷ *AEP 6* includes a breakdown of attendees to non-profit arts and culture events as roughly 70 percent local attendees, 30 percent non-local attendees (approximately 77 percent of which are non-local attendees traveling specifically for the arts event, which comes to roughly 23.1 percent of total attendance). *AEP 6* also provided spending estimates outside the event itself (e.g., a meal at a restaurant afterwards would be counted, but a ticket to attend the event would not be considered) for attendees by their local or non-local status. ORPGA estimated a weighted average spending amount by category based on local/non-local status and spending category, then multiplied the attendance figures by district to these dollar figures to develop inputs to the IMPLAN model. After each district's IMPLAN run using the weighted average spending was completed, each group's impacts (total attendees, non-local arts-specific visitors) were back-calculated using scaling factors that reflected their group's contribution to the weighted average.

⁶ Additional exceptions see footnote #3

⁷ https://aep6.americansforthearts.org/resources/media/user/1696872054-AEP6_National_Findings_Full_Report-Proof_final-web.pdf pages 17-19

Appendix B.2: IMPLAN Details

The 2024 IMPLAN⁸ model for the state of Maryland was used; this is the most recent data year available. Inputs were run as 2024 dollars; impacts are reported in 2025 dollars.

IMPLAN codes utilized in the net new business analysis varied depending on the type of business opening or closing. IMPLAN codes utilized in the attendee spending analysis were identical across districts and are presented below in Figure 16.

Figure 16: IMPLAN Codes Utilized in Attendee Spending Analysis

| Category | Code | Description |
|----------------------------|------|---|
| Offsite food/drink | 491 | Full-service restaurants |
| | 492 | Limited-service restaurants |
| | 493 | All other food and drinking places |
| Retail | 385 | Retail - Motor vehicle and parts dealers |
| | 386 | Retail - Furniture and home furnishings stores |
| | 387 | Retail - Electronics and appliance stores |
| | 388 | Retail - Building material and garden equipment and supplies stores |
| | 393 | Retail - Sporting goods, hobby, musical instrument and book stores |
| | 394 | Retail - General merchandise stores |
| | 395 | Retail - Miscellaneous store retailers |
| Overnight lodging | 489 | Hotels and motels, including casino hotels |
| | 490 | Other accommodations |
| Local transport | 400 | Transit and ground passenger transportation |
| | 391 | Retail - Gasoline stores |
| Clothes/accessories | 392 | Retail - Clothing and clothing accessories stores |
| Supplies/groceries | 389 | Retail - Food and beverage stores |
| | 390 | Retail - Health and personal care stores |
| Childcare | 476 | Child day care services |
| Other | 486 | Other amusement and recreation industries |

Source: IMPLAN, ORPGA

⁸ More information about IMPLAN can be found at: <https://implan.com/>