

# FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis

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*Prepared for*  
The Maryland State Arts Council

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## 1.0 Executive Summary

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

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

Each year, MSAC distributes an annual report for each district to complete. The report highlights the activities undertaken within these districts for the past fiscal year (FY). MSAC then provides these annual reports to Towson University’s Regional Economic Studies Institute (RESI), who tabulates the annual report data into a survey report. This report details a variety of activities that have occurred within the state’s A&E Districts. RESI then utilizes some of this data to conduct an economic and tax revenue impact and footprint analysis that examines business growth within district borders as well as visitor impact from events and festivals. This year’s analysis covers the findings from the FY 2020 district reports.

FY 2020 refers to the period beginning July 2019 and ending June 2020. In March of 2020, the COVID-19 virus began spreading in the U.S. Its highly contagious and serious nature led to periods of mandatory business closures, stay-at-home orders, and social distancing mandates. The pandemic has caused severe health and economic consequences that are not exclusive to the state of Maryland, but rather have been experienced on a global scale. The FY 2020 district reports reflect the impact of the pandemic as many events and festivals were cancelled or made virtual and many establishments could not stay in-business. For these reasons, the economic impact analysis results detailed in this report are not representative of an average fiscal year.

### 1.1 Economic Footprint

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<sup>1</sup> “Strategic Plan,” Maryland State Arts Council, accessed September 22, 2021, <https://msac.org/about/strategic-plan>.

<sup>2</sup> “About—Authority,” Maryland State Arts Council, accessed September 22, 2021, <https://msac.org/about>.

<sup>3</sup> “Programs,” Maryland State Arts Council, accessed September 22, 2021, <https://msac.org/programs>.

<sup>4</sup> “Arts & Entertainment Districts—Program Goals and Strategies,” Maryland State Arts Council, accessed September 22, 2021, <https://msac.org/programs/arts-entertainment-districts>.

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

In FY 2020, the 28 A&E Districts had a total economic footprint of:

- Approximately 1,454 jobs, comprised of 978 jobs supported by attendee spending and 477 supported by net business growth;
- Over \$148.6 million in state GDP, with \$84.2 million from attendee spending and \$64.4 million supported by net business growth; and
- \$46.9 million in employee compensation, comprised of \$28.2 million from attendee spending and \$18.7 million from net business growth.

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

**Figure 1: Economic Footprint of Maryland's A&E Districts, FY 2020**

Activity Type	Direct	Indirect	Induced	Total
<i>Overall Attendee Footprint</i>				
Employment	769	96	112	978
State GDP	\$48,232,223	\$17,974,101	\$17,967,136	\$84,173,461
Employee Compensation	\$17,566,677	\$5,397,816	\$5,289,914	\$28,254,407
<i>Net Business Growth</i>				
Employment	319	81	77	477
State GDP	\$36,267,439	\$15,043,014	\$13,143,050	\$64,453,502
Employee Compensation	\$10,947,551	\$4,076,314	\$3,645,553	\$18,669,418
<b>Total</b>				
Employment	1,087	177	190	1,454
State GDP	\$84,499,662	\$33,017,115	\$31,110,186	\$148,626,963
Employee Compensation	\$28,514,228	\$9,474,130	\$8,935,467	\$46,923,826

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

## 1.2 Tax Footprint

The economic footprints presented above produce over \$10 million in taxes for state and county governments. As seen in Figure 2, sales and property taxes form the majority of these revenues.

**Figure 2: Total State and County Tax Footprints of Maryland's A&E Districts, FY 2020**

Activity Type	Property	Income	Sales	Payroll	Other	Total
Out-of-State Visitor Impact	\$568,754	\$257,030	\$681,318	\$3,612	\$150,047	\$1,660,760

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In-State Attendee Footprint	\$1,763,547	\$796,978	\$2,112,579	\$11,198	\$465,253	\$5,149,556
Business Net Growth Impact	\$987,476	\$725,454	\$1,182,911	\$10,090	\$330,106	\$3,236,038
<b>Total</b>	<b>\$3,319,777</b>	<b>\$1,779,462</b>	<b>\$3,976,809</b>	<b>\$24,900</b>	<b>\$945,406</b>	<b>\$10,046,353</b>

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

Maryland’s 28 A&E Districts contribute to the cultural fabric of the state as well as the economy. This economic activity is shared throughout the state, ranging from dense, urban districts in Baltimore City and the suburbs of Washington, D.C., to sprawling districts that cover entire downtown areas on the Eastern Shore. As the A&E District program continues to grow, and local residents continue to establish districts in their communities, the arts and creative energy in the state will continue to flourish—and benefit the economy.

## 2.0 Introduction

The Maryland State Arts Council (MSAC) is a State agency whose mission is “to advance the arts in our state by providing leadership that champions creative expression, diverse programming, equitable access, lifelong learning, and the arts as a celebrated contributor to the quality of life for all the people of Maryland.”<sup>5</sup> To achieve this mission, MSAC works to increase participation in the arts for all Maryland residents, provide support to all MSAC constituents, further build its organizational and governance capacity, leverage current partnerships and create new beneficial collaborations, and lastly, showcase Maryland’s diverse and vibrant arts community and the contributions they make to the state.<sup>6</sup> MSAC operates under the authority of the Maryland Department of Commerce, underscoring the State’s endorsement that the arts are an integral component of both creative and economic ecosystems within Maryland.<sup>7</sup>

MSAC manages a variety of programs statewide that supports the arts at the individual, organization, and community levels.<sup>8</sup> One of these programs is the Arts & Entertainment Districts (A&E Districts) program, designed 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.”<sup>9</sup> Each A&E District has unique economic development goals and priorities, which can include producing or facilitating events, attracting new businesses or developers, encouraging artists to locate and/or sell artworks in the district’s boundaries, or a combination of strategies. On July 1, 2019, Maryland Secretary of Commerce Kelly M. Schultz announced the designation

<sup>5</sup> “Strategic Plan,” Maryland State Arts Council.

<sup>6</sup> Ibid.

<sup>7</sup> “About—Authority,” Maryland State Arts Council.

<sup>8</sup> “Programs,” Maryland State Arts Council.

<sup>9</sup> “Arts & Entertainment Districts—Program Goals and Strategies,” Maryland State Arts Council.

of two new A&E Districts in Maryland, the Eastern shore town of Easton and the area along Pennsylvania Avenue in Baltimore City.<sup>10</sup>

Each year, MSAC distributes an annual report for each district to complete. The report highlights the activities undertaken within these districts for the past fiscal year (FY). MSAC tasked Towson University's Regional Economic Studies Institute (RESI) with analyzing the data collected from the annual report. To achieve the project objective, RESI collated and analyzed the survey results in a comprehensive report of all 28 districts for FY 2020.

Once this preliminary analysis was completed, RESI utilized the results to conduct an economic and tax analysis of the state's A&E Districts. To quantify the role of A&E Districts within Maryland's economy, RESI considered the role of net new business growth within district borders in FY 2020 (July 2019-June 2020) as well as spending associated with attendees at events and festivals within district boundaries in FY 2020. This analysis continues the 11-year relationship between MSAC and RESI but updates the economic and tax analysis to reflect changes in the underlying model data as well as refinements to the modeling process; these changes will be discussed in Section 3.0 Technical Approach. Because of these changes, the results presented in this report cannot be directly compared to previous economic and tax analyses of A&E Districts.

The report continues as follows:

- Section 3.0 Technical Approach presents the technical approach utilized for the analysis;
- Section 4.0 The Arts and their Role in the Economy provides background information about the role of cultural and arts districts in the economy;
- Section 5.0 Economic Footprint and Impacts presents the economic analysis;
- Section 6.0 Tax Revenue Footprints and Impacts presents the tax revenue analysis; and
- Section 7.0 Conclusion concludes the report.

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

### **3.0 Technical Approach**

Maryland's A&E Districts support creativity, and in turn, spur economic activity in their localities. This activity supports additional businesses throughout Maryland's economy. Thus, the total influence of Maryland's A&E Districts extends beyond district borders. This total

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<sup>10</sup> "Maryland Designates Two New Arts and Entertainment Districts," Maryland Department of Commerce, July 1, 2019, accessed September 23, 2021, <https://commerce.maryland.gov/media/maryland-designates-two-new-arts-and-entertainment-districts>.

activity can be quantified using economic impact models. This section will provide more context on the economic model used in the analysis as well as RESI's modeling process.

### 3.1 Model Background

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

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

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

For the FY 2020 economic and tax analysis of Maryland's A&E Districts, RESI used the IMPLAN model for the state of Maryland for 2019 and represented the results in 2021 dollars. The 2019 model year is based on a 546-sector scheme for the state's economy.<sup>11</sup>

This year, RESI used the same 546-sector scheme in the FY 2019 analysis of Maryland's A&E Districts, as it remains the most up to date. As noted in the last report, this scheme was not used in any of the analyses conducted prior to FY 2019. Due to this variation, as well as significant changes to the underlying data in the model, the results of the IMPLAN analysis in this report cannot be directly compared to reports prior to FY 2019.<sup>12</sup> Beyond the sector scheme transition, IMPLAN introduced an updated tax results section this year that no longer includes the "state and local tax impact" category used in all prior RESI reports.<sup>13</sup> In this report, RESI will combine the state and county tax impact results to best replicate the former analysis category. For this reason, tax impact analysis results in this report cannot be directly compared

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<sup>11</sup> Candi Clouse, "IMPLAN Sectoring & NAICS Correspondences," IMPLAN, updated July 2021, accessed September 22, 2021, <https://support.implan.com/hc/en-us/articles/115009674428-IMPLAN-Sectoring-NAICS-Correspondences>.

<sup>12</sup> Candi Clouse, "BEA Benchmark and the New 546 Industry Scheme—Comparing Data Across Time," IMPLAN, updated July 2021, accessed September 22, 2021, <https://implanhelp.zendesk.com/hc/en-us/articles/360034895094-BEA-Benchmark-The-New-546-Industry-Scheme>.

<sup>13</sup> Candi Clouse, "Version 6 Release Notes—6.0.25 RELEASE," IMPLAN, updated July 2021, accessed September 22, 2021, <https://support.implan.com/hc/en-us/articles/1260802300950-Version-6-Release-Notes>.



to any prior reports. Additionally, IMPLAN notes that some economic effects may appear smaller in this up-to-date version of the model due to methodological and underlying data changes, even if the economy is not shrinking.<sup>14</sup>

### 3.2 Modeling Approach

To capture the economic activity associated with Maryland's A&E districts, RESI considered two different activities: spending associated with attendees at events in festivals within A&E Districts during FY 2020, and activity associated with net new businesses that opened within A&E Districts in FY 2020. Please note that some of these processes have been updated from prior analyses to re-benchmark spending patterns. Thus, these results cannot be directly compared with prior reports.

#### 3.2.1 Modeling Attendee Spending

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

To calculate the traditional economic impacts and the economic footprint of events and festivals in Maryland's A&E Districts in FY 2020, RESI utilized information provided in the annual reports. Generally, A&E Districts provided a list of events and festivals as well as approximate attendance. For districts where attendance figures were unavailable, RESI estimated attendance based on other A&E Districts' data. Please note that this may result in under-counting or over-counting of attendee counts in some districts.

RESI used these attendance figures and research published by Americans for the Arts to estimate attendee spending at A&E District events and festivals. These calculations take into consideration both the proportion of attendees that are Maryland residents versus out-of-state visitors, as well as the different spending patterns for these two groups.<sup>15</sup>

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

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<sup>14</sup> Clouse, "BEA Benchmark and the New 546 Industry Scheme—Comparing Data Across Time."

<sup>15</sup> Americans for the Arts, "The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland," 2017, 1, accessed September 8, 2021, [https://www.americansforthearts.org/sites/default/files/pdf/2017/by\\_program/reports\\_and\\_data/aep5/map/MD\\_StateOfMaryland\\_AEP5\\_OnePageSummary.pdf](https://www.americansforthearts.org/sites/default/files/pdf/2017/by_program/reports_and_data/aep5/map/MD_StateOfMaryland_AEP5_OnePageSummary.pdf).

### 3.2.2 Modeling Net New Business Activity

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

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

## 4.0 The Arts and their Role in the Economy

According to the most current edition of Americans for the Arts report, *Arts & Economic Prosperity V*, the nonprofit arts and culture industry in the U.S. generated \$166.3 billion in total direct expenditures and \$96.1 billion in resident household incomes in 2015. This activity supported 4.6 million full-time equivalent jobs. Jobs within the arts and culture industry account for 0.8 percent of the U.S. workforce, which exceeds the proportion of the workforce who are Police Officers (0.5 percent) and Computer Programmers (0.2 percent).<sup>16</sup> Taxes associated with the industry and paid to local, state, and federal governments amounted to \$27.5 billion.<sup>17</sup>

The arts and culture industry is also important to the Mid-Atlantic region. Figure 3 provides key economic statistics at the state level. These metrics provide useful context to Maryland’s comparative standing as well as the role of the industry in the region. As shown in Figure 3, the District of Columbia tops the charts in value added per capita. This is most likely partially due to its population being smaller than the other five.

**Figure 3: Statewide Economic Metrics for the Nonprofit Arts and Culture Industry, 2019**

State	Value Added per Capita	Compensation per Employee
District of Columbia	\$17,905	\$141,994
New Jersey	\$2,646	\$88,026

<sup>16</sup> Americans for the Arts, “Arts & Economic Prosperity V: The Economic Impact of Nonprofit Arts & Cultural Organizations and Their Audiences,” 5, accessed September 8, 2021, [https://www.americansforthearts.org/sites/default/files/aep5/PDF\\_Files/NationalFindings\\_StatisticalReport.pdf](https://www.americansforthearts.org/sites/default/files/aep5/PDF_Files/NationalFindings_StatisticalReport.pdf).

<sup>17</sup> Americans for the Arts, “Arts & Economic Prosperity V,” 4.

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Pennsylvania	\$2,118	\$72,950
<i>Maryland</i>	<i>\$1,939</i>	<i>\$79,340</i>
Delaware	\$1,106	\$59,269

Source: National Assembly of State Arts Agencies (NASAA), U.S. Census Bureau, RESI

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

As of 2019, the most recent data available from the ACPSA, the industry’s economic activity accounted for 4.3 percent of GDP, or \$919.7 billion, nationwide. In the same report, employment data shows that the industry provided 5.2 million jobs nationwide and the percent change in these jobs increased in 35 states and the District of Columbia from the year prior.<sup>18</sup> The ACPSA also produces state-level data; information on the Mid-Atlantic Region is presented in Figure 4 below.

**Figure 4: Statewide Economic Comparison of Arts and Cultural Production Industries across Mid-Atlantic States, 2019**

State	Employment	Employment Location Quotient	Compensation (in Thousands)	Compensation Location Quotient
Pennsylvania	180,849	0.86	13,192,939	0.76
New Jersey	136,092	0.96	11,979,655	0.88
<i>Maryland</i>	<i>79,866</i>	<i>0.83</i>	<i>6,336,581</i>	<i>0.70</i>
District of Columbia	57,122	2.13	8,110,985	2.10
Delaware	8,854	0.56	524,772	0.39
<b>United States</b>	<b>5,208,492</b>	<b>1.00</b>	<b>446,655,018</b>	<b>1.00</b>

Source: BEA ACPSA

The table above includes sections on employment and compensation location quotients. The ACPSA defines location quotients (LQs) as a measurement of “an industry’s regional concentration of value added, employment, or compensation relative to the U.S. industry’s share.”<sup>19</sup> LQs are based on a number system where a score of one is equal to the industry’s national proportion. For example, in Figure 4 above, Maryland has an employment LQ of 0.83 and a compensation LQ of 0.70. This indicates that Maryland’s employment in the industry is 17 percent below the industry’s national employment share and that Maryland’s compensation in

<sup>18</sup> “Arts and Cultural Production Satellite Account, U.S. and States,” Bureau of Economic Analysis, last modified March 30, 2021, accessed August 25, 2021, <https://www.bea.gov/news/2021/arts-and-cultural-production-satellite-account-us-and-states>.

<sup>19</sup> Bureau of Economic Analysis, “Definitions,” accessed August 25, 2021, <https://apps.bea.gov/regional/pdf/acpsa/definitions.pdf>.

the industry is 30 percent below the industry’s national compensation share. Compared to the LQs of other states shown in Figure 4, Maryland is not an outlier, with Delaware at the lower end and District of Columbia at the upper end.

In addition to the role of the arts and culture industry in a state’s economy, individuals who attend related events or visit arts establishments also contribute to the economy. Figure 5 below shows average event-related spending per person by residential status provided by Americans for the Arts.<sup>20,21</sup> Resident attendees are defined as members of the audience who also live in the area of question, while nonresident attendees are members of the audience who travel to the locality to attend the event or visit the establishment.

**Figure 5: Nonprofit Arts and Cultural Event Attendees Average Spending per Person (2021 dollars)**

Expenditure Category	Resident Attendee	Nonresident Attendee
Meals and Refreshments	\$16.33	\$24.35
Souvenirs and Gifts	\$3.14	\$5.30
Ground Transportation	\$2.76	\$5.17
Overnight Lodging (one night)	\$0.56	\$8.58
Other/Miscellaneous	\$2.83	\$3.05
<b>Total</b>	<b>\$25.61</b>	<b>\$46.45</b>

Sources: Americans for the Arts, RESI

Figure 5 above shows that nonresident attendees, on average, spend almost double what resident attendees spend. The main cost difference is driven by the overnight lodging category, where nonresident attendees spend 15 times more than their resident counterparts. This variation in spending patterns is not the only difference between the two groups: nonresident attendees are referred to as “economic visitors” and the dollars they spend are “new dollars” entering the economy in question. On the other hand, resident attendees would be expected to spend locally even if they did not attend that specific event.

## 5.0 Economic Footprint and Impacts

This section contains the results of the economic analysis for Maryland’s A&E Districts. Calculations are based on the 2019 IMPLAN Model for the state of Maryland. Economic activity is considered in terms of employment, state GDP, and employee compensation based on attendee spending at district events and festivals held in FY 2020 and net new businesses that opened in the districts in FY 2020. For more detailed results, please see Appendix C—Detailed Economic and Tax Impacts and Footprints. Throughout this section, please note that totals may not sum due to rounding.

<sup>20</sup> Americans for the Arts, “Arts & Economic Prosperity V,” 1.

<sup>21</sup> RESI then adjusted these spending estimates for inflation, from 2015 to 2021 dollars.

### 5.1 Overall Economic Footprint of Maryland's A&E Districts

This section provides a summary of the overall economic footprint of Maryland's A&E Districts for FY 2020, including the:

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

Figure 6 below displays the total economic footprint of economic activity of Maryland's A&E Districts in FY 2020. In general, older, more established districts tend to have larger economic impacts.

Please note that these figures are not directly comparable to past analyses due to changes in the underlying data in the economic model, as well as recalibrations of spending patterns to better reflect current trends. Despite not being able to directly compare this analysis to past ones, the current analysis does point towards a significant departure in trend in terms of both visitor and resident spending at events and festivals and net business growth. This variation is most likely attributable to circumstances caused by the COVID-19 pandemic. The COVID-19 virus began spreading in the U.S. in March of 2020 and its highly contagious and serious nature led to periods of mandatory business closures, stay-at-home orders, and social distancing mandates. The pandemic has caused severe health and economic consequences that are not exclusive to the state of Maryland, but rather have been experienced on a global scale.

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**Figure 6: Total Economic Footprint of Maryland's A&E Districts, FY 2020<sup>22</sup>**

District	Designation Year	Employment	State GDP	Employee Compensation
Annapolis	2008	46	\$4,063,754	\$1,302,567
Bel Air	2010	73	\$7,815,178	\$2,913,742
Berlin	2005	16	\$2,578,948	\$803,479
Bethesda	2002	84	\$11,937,820	\$3,140,369
Bromo	2013	33	\$4,865,283	\$1,181,645
Cambridge	2003	27	\$2,460,572	\$768,573
Chestertown	2015	49	\$5,438,353	\$1,651,274
Crisfield	2018	10	\$1,007,462	\$285,185
Cumberland	2002	80	\$12,653,019	\$3,351,929
Denton	2005	7	\$709,461	\$234,795
Easton	2019	54	\$5,037,754	\$1,679,317
Elkton	2006	4	\$387,439	\$118,214
Frederick	2003	98	\$9,891,631	\$3,264,051
Frostburg	2009	16	\$1,487,894	\$425,570
Gateway	2002	103	\$10,322,716	\$3,260,929
Grantsville	2015	3	\$280,280	\$89,071
Hagerstown	2002	137	\$13,899,493	\$4,453,032
Havre de Grace	2008	62	\$5,771,129	\$1,662,502
Highlandtown	2003	8	\$683,845	\$121,496
Leonardtwn	2014	110	\$11,737,177	\$4,143,741
Oakland	2017	48	\$4,460,863	\$1,380,390
Pennsylvania Ave.	2019	0	\$2,264	\$719
Salisbury	2007	61	-\$1,184,477	\$362,397
Silver Spring	2002	135	\$14,962,194	\$4,607,906
Snow Hill	2006	4	\$433,495	\$147,104
Station North	2002	155	\$14,757,870	\$4,707,360
Stevensville	2014	14	\$1,147,701	\$460,198
Wheaton	2006	15	\$1,017,847	\$406,272
<b>Total</b>	--	<b>1,454</b>	<b>\$148,626,963</b>	<b>\$46,923,826</b>

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

<sup>22</sup> Districts with negative impacts do not negatively affect the Maryland economy. Rather, they are the result of more businesses leaving the district than opening in a district within the study period, or if less resource-intensive employment replaces more resource-intensive employment. For example, if one physician job with a salary of \$150,000 is lost but two server jobs with wages of \$40,000 each are gained, there would still be a "loss" of \$70,000 even though the number of jobs increases by one.

In FY 2020, Maryland's A&E Districts supported a total of 1,454 jobs, over \$148.6 million in state GDP, and over \$46.9 million in employee compensation in FY 2020. As shown in Figure 6 above, economic activity was distributed throughout the state, rather than being concentrated within a single region. Data reported by Silver Spring, a suburban area in Montgomery County, had the largest effect on Maryland's economy, totaling 135 jobs, \$14.9 million in state GDP, and \$4.6 million in employee compensation. The Station North A&E District in Baltimore City saw the second-largest footprint, at 155 jobs, \$14.8 million in state GDP, and \$4.7 million in employee compensation.

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

## **5.2 Event and Festival Attendee Footprint and Impact**

Maryland's 28 A&E Districts were home to 965 events and festivals in FY 2020, with reported attendance of nearly 1.6 million.<sup>23</sup> Based on data reported by Americans for the Arts, RESI estimated that approximately 84.9 percent of attendees were Maryland residents, while the other 15.1 percent were visitors from out of state.<sup>24</sup> However, since out-of-state visitors tend to have higher spending levels than their in-state counterparts, they account for approximately 24.4 percent of attendee spending—on average in 2021 dollars, each out-of-state visitor spent approximately \$46.45, while each Maryland resident attendee spent approximately \$25.61.<sup>25</sup>

Please note that these figures are not directly comparable to past analyses due to changes in the underlying data in the economic model as well as recalibrations of spending patterns to better reflect current trends. It is also important to note that FY 2020 was not a standard year because of the COVID-19 pandemic. Because of the pandemic, RESI expects FY 2020 figures to show an uncharacteristically low number of events and festivals, as well as low attendance numbers.<sup>26</sup>

Below, Figure 7 contains the statewide economic effects associated with attendee spending, presented by the residency of the visitor. Impacts associated with out-of-state visitors represent new dollars flowing into the Maryland economy, spurring additional activity. Footprint figures associated with Maryland residents represent spending that is directed to

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<sup>23</sup> Daraius Irani, et al., "Maryland Arts and Entertainment District Survey Analysis FY 2020," Regional Economic Studies Institute (August 24, 2021), 4.

<sup>24</sup> Americans for the Arts, "The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland," 1.

<sup>25</sup> RESI analysis of Americans for the Arts data: Americans for the Arts, "The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland," 1.

<sup>26</sup> Although direct comparisons should be made with caution, the estimated number of visitors did decrease from approximately 1.9 million to 1.6 million and the estimated number of events and festivals also decreased from approximately 1,499 to 965.

local economies where A&E districts are located. For impacts at the district level, please see Appendix C.

**Figure 7: Statewide Economic Footprints of A&E District Event/Festival Attendee Spending, FY 2020**

<b>Activity Type</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
<i>Out-of-State Visitor Impact</i>				
Employment	188	24	27	238
State GDP	\$11,761,885	\$4,383,155	\$4,381,456	\$20,526,496
Employee Compensation	\$4,283,801	\$1,316,309	\$1,289,996	\$6,890,105
<i>In-state Attendee Footprint</i>				
Employment	581	73	85	739
State GDP	\$36,470,338	\$13,590,946	\$13,585,680	\$63,646,964
Employee Compensation	\$13,282,876	\$4,081,507	\$3,999,919	\$21,364,302
<i>Overall Attendee Footprint</i>				
Employment	769	96	112	978
State GDP	\$48,232,223	\$17,974,101	\$17,967,136	\$84,173,461
Employee Compensation	\$17,566,677	\$5,397,816	\$5,289,914	\$28,254,407

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

Overall spending by attendees at events and festivals in Maryland’s A&E Districts in FY 2020 directly supported 769 jobs, over \$48.2 million in state GDP, and nearly \$17.6 million in employee compensation. When economic activity associated with suppliers to these direct activities as well as additional spending by employees carrying out these activities, the total footprint grew to 978 jobs, nearly \$84.2 million in state GDP, and over \$28.2 million in employee compensation.

Of particular importance are the out-of-state visitor impacts, as they are the result of new dollars flowing into Maryland’s economy. Their expenditures supported a total of 238 jobs, over \$20.5 million in state GDP, and nearly \$6.9 million in employee compensation.

### 5.3 Net Business Growth Economic Impact

Businesses within Maryland’s A&E Districts contribute to the cultural offerings in their districts and bolster the Maryland economy. Statewide, there was a net growth of 14 retailers, 40 businesses, 9 restaurants, and 24 organizations with a combined estimated employment of 319 workers.<sup>27,28</sup> These net new businesses supported additional economic activity in Maryland’s economy, as presented in Figure 8.

<sup>27</sup> Irani, et al., “Maryland Arts and Entertainment District Survey Analysis FY 2020,” 4.

<sup>28</sup> In their annual reports, some districts reported employee counts for establishments that opened or closed; for districts that did not provide this information, RESI estimated employee counts based on data from other districts.



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While comparisons to previous analyses should be made with caution due to changes in the underlying data in the economic model, average employment per establishment appears lower in FY 2020 than in previous years. While this does lower the overall impact, it could indicate that businesses contributing to the cultural landscape in their districts are small businesses.<sup>29</sup>

**Figure 8: Economic Impacts of Net Business Growth in Maryland's A&E Districts, FY 2020**

	Direct	Indirect	Induced	Total
Employment	319	81	77	477
State GDP	\$36,267,439	\$15,043,014	\$13,143,050	\$64,453,502
Employee Compensation	\$10,947,551	\$4,076,314	\$3,645,553	\$18,669,418

Sources: IMPLAN, MSAC, RESI

In FY 2020, the estimated 319 direct jobs in Maryland’s A&E Districts supported an additional 158 indirect and induced jobs in Maryland’s economy, for a total of 477 jobs. These 477 jobs paid total employee compensation of nearly \$18.7 million and were associated with approximately \$64.5 million in state GDP.

## 6.0 Tax Revenue Footprints and Impacts

The economic footprints presented in the previous section produced corresponding tax impacts for the State of Maryland. In the cases of net new businesses and spending by out-of-state visitors, taxes paid represent new dollars paid to state coffers. For any taxes paid by Maryland residents, these are not necessarily new tax revenues for the State, but rather represent the footprint or reach of spending associated with A&E Districts. Please note that in previous analyses, RESI has provided combined estimations for state and local government tax revenue. In their newest system update, IMPLAN ceased its support of state and local tax revenue combined impact estimations. To accommodate for this change, RESI calculated and summed the state and county tax revenues to estimate the total tax revenue.

Taxes paid to the State and County as a result of economic activity tied to Maryland’s A&E Districts are presented in Figure 9. For impacts at the district level, please see Appendix C—Detailed Economic and Tax Impacts and Footprints.

**Figure 9: Total Tax Revenue Footprint of Maryland's A&E Districts, FY 2020**

Activity Type	Property	Income	Sales	Payroll	Other	Total
Out-of-State Visitor Impact	\$568,754	\$257,030	\$681,318	\$3,612	\$150,047	\$1,660,760
In-State Attendee Footprint	\$1,763,547	\$796,978	\$2,112,579	\$11,198	\$465,253	\$5,149,556

<sup>29</sup> Across all districts, the average retailer, business, restaurant, and/or organization that either opened or closed in FY 2020 was reported to have approximately three employees.

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Business Net Growth Impact	\$987,476	\$725,454	\$1,182,911	\$10,090	\$330,106	\$3,236,038
<b>Total Footprint</b>	<b>\$3,319,777</b>	<b>\$1,779,462</b>	<b>\$3,976,809</b>	<b>\$24,900</b>	<b>\$945,406</b>	<b>\$10,046,353</b>

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

As seen above, state and county governments received over \$10.0 million in revenues associated with Maryland's A&E Districts. Sales and property tax revenues formed the majority of the tax revenue footprint at a combined \$7.3 million. Additionally, tax impacts associated with out-of-state visitors were especially valuable to Maryland and local governments as they are associated with new dollars being injected into the state's economy.

## 7.0 Conclusion

Maryland's 28 A&E Districts contribute to the cultural fabric of the state as well as the economy. In FY 2020, activity associated with Maryland's A&E Districts supported 1,454 jobs, \$148.6 million in state GDP, \$46.9 million in employee compensation, and \$10.0 million in state and county tax revenues. This economic activity is shared throughout the state, ranging from dense, urban districts in Baltimore City and the suburbs of Washington, D.C., to sprawling districts that cover entire downtown areas on the Eastern Shore. As the A&E District program continues to grow, and local residents continue to establish districts in their communities, the arts and creative energy in the state will continue to enhance lives and benefit the economy.

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## Appendix A—Methodology

### A.1 IMPLAN Model Overview

To quantify the economic and tax impacts of the A&E districts on Maryland, RESI utilized the IMPLAN input/output model. This model enumerates the economic and tax impact of each dollar earned and spent by the following: employees in the district, other supporting vendors (business services, retail, etc.), each dollar spent by these vendors on other firms, and each dollar spent by the households' employees, other vendors' employees, and other businesses' employees.

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

Consider the following example. A new firm opens in a region and directly employs 100 workers. The firm purchases supplies, both from outside the region as well as from local suppliers, which leads to increased business for local firms, thereby hypothetically creating jobs for another 100 workers. This is called the indirect effect. The workers at the firm and at suppliers spend their income mostly in the local area, hypothetically creating jobs for another 50 workers. This is the induced effect. The direct, indirect and induced effects add up to 250 jobs created from the original 100 jobs. Thus, in terms of employment, the total economic impact of the firm in our example is 250.<sup>30</sup>

This analysis was conducted using the 2019 IMPLAN Model for the state of Maryland, the most recent data year available. The 2019 IMPLAN Model contains significant changes in the underlying data as well as to the industry sector structure, therefore, results generated using this model cannot be directly compared to results from prior models.

### A.2 IMPLAN Modeling Process

Impacts were determined based on two main factors: net business growth and spending by attendees at events and festivals. When data were not available from the districts, RESI estimated attendance and/or employment data based on all of the other district's data.

1. Net business growth within the districts' borders; that is, the increase in employment at firms that opened during FY 2020 less the employment at firms that closed in FY 2020; and

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<sup>30</sup> Total economic impact is defined as the sum of direct, indirect, and induced effects.

2. Estimated spending by attendees at events and festivals, based on attendance counts provided by the districts in their FY 2020 annual report and visitor spending data published by Americans for the Arts.

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

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

**Figure 10: IMPLAN Codes Used in the Analysis**

<b>Code</b>	<b>Description</b>
402	Retail - Motor vehicle and parts dealers
403	Retail - Furniture and home furnishings stores
404	Retail - Electronics and appliance stores
405	Retail - Building material and garden equipment and supplies stores
406	Retail - Food and beverage stores
407	Retail - Health and personal care stores
409	Retail - Clothing and clothing accessories stores
410	Retail - Sporting goods, hobby, musical instrument and book stores
411	Retail - General merchandise stores
412	Retail - Miscellaneous store retailers
413	Retail - Nonstore retailers
418	Transit and ground passenger transportation
425	Book publishers
429	Motion picture and video industries
436	Data processing, hosting, and related services
439	Nondepository credit intermediation and related activities
441	Monetary authorities and depository credit intermediation
442	Other financial investment activities
444	Insurance carriers, except direct life
447	Other real estate
448	Tenant-occupied housing
455	Legal services
457	Architectural, engineering, and related services

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458	Specialized design services
462	Management consulting services
466	Photographic services
473	Business support services
475	Investigation and security services
478	Other support services
481	Junior colleges, colleges, universities, and professional schools
482	Other educational services
483	Offices of physicians
484	Offices of dentists
485	Offices of other health practitioners
486	Outpatient care centers
493	Individual and family services
494	Child day care services
495	Community food, housing, and other relief services, including rehabilitation services
496	Performing arts companies
497	Commercial Sports Except Racing
500	Promoters of performing arts and sports and agents for public figures
501	Museums, historical sites, zoos, and parks
504	Other amusement and recreation industries
505	Fitness and recreational sports centers
507	Hotels and motels, including casino hotels
508	Other accommodations
509	Full-service restaurants
510	Limited-service restaurants
511	All other food and drinking places
512	Automotive repair and maintenance, except car washes
516	Personal and household goods repair and maintenance
517	Personal care services
519	Dry-cleaning and laundry services
520	Other personal services
522	Grantmaking, giving, and social advocacy organizations
523	Business and professional associations
524	Labor and civic organizations
526	Postal service

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

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

aggregated to the state level. Appendix C—Detailed Economic and Tax Impacts and Footprints contains additional detailed impacts.



## Appendix B—Glossary

Figure 11: Glossary of Terms

Term	Definition
Economic Impact	This term refers to the changes in the economy resulting from an economic event and activities that support the event. Economic impacts are generated when the economic event is new or would not otherwise occur in the study region.
Economic footprint	This term refers to the additional economic activity supported by an initial activity. This initial activity would have occurred in the study region anyway.
Employment	This term refers to the number of jobs created or supported as a result of district activity which has been modeled in IMPLAN.
Employee Compensation Impact	This term refers to the change in employee compensation (including all salaries and wages, benefits, etc.) associated with the job and state GDP creation resulting from district activity which has been modeled in IMPLAN.
Fiscal/Tax Impact	This term refers to the change in tax revenues resulting from an event. RESI typically reports state and local tax revenues, which are combined in IMPLAN.
IMPLAN	This term refers to the input/output modeling software used to model changes in the economy in a particular region. The user builds a model based on prepackaged economic data from IMPLAN (typically at the state or county level), then enters input figures—an industry change of employment or sales, a household change of income, and/or several other input types—for the industry sectors expected to be impacted as a “scenario.” IMPLAN runs the scenario created in the model and produces the economic and fiscal/tax outputs.
New Businesses	This term refers to all of the businesses which were newly created within an A&E district during the study period according to data provided in the A&E district annual reports. These businesses may include both for-profit and nonprofit entities. The breakout of for-profit and nonprofit businesses cannot be precisely determined from the data provided.
State GDP	This term refers to the economic activity created as a result of district activity that has been modeled in IMPLAN. In other words, it is the market value of all final goods and services produced by the economy of the region being modeled.

Source: RESI

## Appendix C—Detailed Economic and Tax Impacts and Footprints

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

### C.1 Employment

**Figure 12: Out-of-state Visitor Employment Impacts**

District	Direct	Indirect	Induced	Total
Annapolis	11	1	2	14
Bel Air	11	1	2	15
Berlin	3	0	0	3
Bethesda	8	1	1	10
Bromo	2	0	0	2
Cambridge	5	1	1	6
Chestertown	3	0	0	3
Crisfield	1	0	0	2
Cumberland	0	0	0	0
Denton	0	0	0	0
Easton	4	1	1	6
Elkton	1	0	0	2
Frederick	24	3	4	31
Frostburg	2	0	0	2
Gateway	14	2	2	18
Grantsville	1	0	0	1
Hagerstown	19	2	3	25
Havre de Grace	8	1	1	11
Highlandtown	2	0	0	3
Leonardtwn	3	0	0	4
Oakland	7	1	1	9
Pennsylvania Ave.	0	0	0	0
Salisbury	15	2	2	19
Silver Spring	20	3	3	25
Snow Hill	1	0	0	1
Station North	20	2	3	25
Stevensville	0	0	0	1
Wheaton	2	0	0	2
<b>Total</b>	<b>188</b>	<b>24</b>	<b>27</b>	<b>238</b>

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

**Figure 13: In-state Attendee Employment Footprint**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	33	4	5	42
Bel Air	36	4	5	45
Berlin	8	1	1	11
Bethesda	25	3	4	32
Bromo	5	1	1	7
Cambridge	14	2	2	18
Chestertown	8	1	1	10
Crisfield	4	0	1	5
Cumberland	1	0	0	1
Denton	1	0	0	1
Easton	14	2	2	17
Elkton	4	1	1	5
Frederick	76	9	11	96
Frostburg	6	1	1	8
Gateway	44	6	6	56
Grantsville	2	0	0	2
Hagerstown	60	8	9	77
Havre de Grace	26	3	4	33
Highlandtown	7	1	1	8
Leonardtwn	10	1	1	13
Oakland	21	3	3	27
Pennsylvania Ave.	0	0	0	0
Salisbury	46	6	7	58
Silver Spring	62	8	9	79
Snow Hill	2	0	0	2
Station North	60	8	9	77
Stevensville	1	0	0	2
Wheaton	5	1	1	6
<b>Total</b>	<b>581</b>	<b>73</b>	<b>85</b>	<b>739</b>

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

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

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	44	6	6	56
Bel Air	47	6	7	60
Berlin	11	1	2	14
Bethesda	34	4	5	43
Bromo	7	1	1	9
Cambridge	18	2	3	24
Chestertown	11	1	2	14
Crisfield	5	1	1	7
Cumberland	1	0	0	2
Denton	1	0	0	1
Easton	18	2	3	23
Elkton	5	1	1	7
Frederick	100	13	15	127
Frostburg	8	1	1	10
Gateway	59	7	9	74
Grantsville	2	0	0	3
Hagerstown	80	10	12	101
Havre de Grace	35	4	5	44
Highlandtown	9	1	1	11
Leonardtwn	13	2	2	17
Oakland	28	3	4	35
Pennsylvania Ave.	0	0	0	0
Salisbury	60	8	9	77
Silver Spring	82	10	12	104
Snow Hill	2	0	0	3
Station North	80	10	12	102
Stevensville	2	0	0	2
Wheaton	6	1	1	8
<b>Total</b>	<b>769</b>	<b>96</b>	<b>112</b>	<b>978</b>

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

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**Figure 15: Net Business Growth Employment Impacts<sup>31</sup>**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	-8	-1	-1	-10
Bel Air	7	2	5	13
Berlin	-2	3	2	2
Bethesda	21	12	8	41
Bromo	18	2	4	24
Cambridge	3	0	0	4
Chestertown	26	5	5	35
Crisfield	2	1	0	3
Cumberland	49	16	14	79
Denton	4	1	1	5
Easton	25	3	4	31
Elkton	-2	0	0	-2
Frederick	-24	-3	-2	-29
Frostburg	5	1	1	6
Gateway	20	4	4	28
Grantsville	0	0	0	0
Hagerstown	24	5	6	35
Havre de Grace	15	2	1	18
Highlandtown	-2	0	0	-3
Leonardtwn	67	12	15	93
Oakland	10	1	2	13
Pennsylvania Ave.	0	0	0	0
Salisbury	-10	1	-7	-16
Silver Spring	15	9	7	31
Snow Hill	1	0	0	1
Station North	41	5	7	53
Stevensville	9	1	2	12
Wheaton	6	0	1	7
<b>Total</b>	<b>319</b>	<b>81</b>	<b>77</b>	<b>477</b>

Sources: IMPLAN, MSAC, RESI

<sup>31</sup> Neither Grantsville nor Pennsylvania Avenue provided information on their net business closures for FY 2020.

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 16: Full Employment Footprint for Maryland's A&E Districts, FY 2020**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	36	4	5	46
Bel Air	53	7	12	73
Berlin	9	4	3	16
Bethesda	55	16	13	84
Bromo	25	3	5	33
Cambridge	21	3	3	27
Chestertown	36	6	6	49
Crisfield	7	1	1	10
Cumberland	50	16	14	80
Denton	5	1	1	7
Easton	42	5	7	54
Elkton	3	0	1	4
Frederick	76	10	13	98
Frostburg	13	2	2	16
Gateway	79	11	13	103
Grantsville	2	0	0	3
Hagerstown	104	15	18	137
Havre de Grace	49	7	6	62
Highlandtown	7	1	1	8
Leonardtwn	80	13	16	110
Oakland	38	5	6	48
Pennsylvania Ave.	0	0	0	0
Salisbury	51	8	2	61
Silver Spring	97	20	19	135
Snow Hill	3	0	0	4
Station North	121	15	18	155
Stevensville	11	2	2	14
Wheaton	12	1	2	15
<b>Total</b>	<b>1,087</b>	<b>177</b>	<b>190</b>	<b>1,454</b>

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

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**C.2 Output or State GDP**

**Figure 17: Out-of-state Visitor Spending State GDP Impacts, FY 2020**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	\$712,562	\$266,719	\$266,996	\$1,246,277
Bel Air	\$757,883	\$283,683	\$283,977	\$1,325,543
Berlin	\$177,790	\$66,549	\$66,618	\$310,956
Bethesda	\$543,188	\$203,321	\$203,532	\$950,041
Bromo	\$116,949	\$43,775	\$43,820	\$204,544
Cambridge	\$298,409	\$111,697	\$111,813	\$521,920
Chestertown	\$173,722	\$65,026	\$65,093	\$303,841
Crisfield	\$82,653	\$30,938	\$30,970	\$144,561
Cumberland	\$22,618	\$8,466	\$8,475	\$39,559
Denton	\$15,079	\$5,644	\$5,650	\$26,373
Easton	\$288,251	\$107,895	\$108,007	\$504,153
Elkton	\$86,854	\$32,510	\$32,544	\$151,908
Frederick	\$1,614,135	\$604,187	\$604,813	\$2,823,136
Frostburg	\$127,995	\$47,910	\$47,959	\$223,864
Gateway	\$945,274	\$353,825	\$354,192	\$1,653,291
Grantsville	\$39,079	\$14,628	\$14,643	\$68,349
Hagerstown	\$1,285,361	\$481,123	\$481,622	\$2,248,107
Havre de Grace	\$561,984	\$210,356	\$210,574	\$982,915
Highlandtown	\$140,324	\$52,525	\$52,579	\$245,428
Leonardtwn	\$214,891	\$80,436	\$80,519	\$375,846
Oakland	\$440,575	\$168,200	\$164,221	\$772,995
Pennsylvania Ave.	\$316	\$118	\$118	\$552
Salisbury	\$337,037	\$103,432	\$101,450	\$541,919
Silver Spring	\$1,318,626	\$493,575	\$494,086	\$2,306,287
Snow Hill	\$37,872	\$14,176	\$14,191	\$66,239
Station North	\$1,291,133	\$483,284	\$483,785	\$2,258,202
Stevensville	\$29,526	\$11,052	\$11,064	\$51,642
Wheaton	\$101,800	\$38,105	\$38,144	\$178,048
<b>Total</b>	<b>\$11,761,885</b>	<b>\$4,383,155</b>	<b>\$4,381,456</b>	<b>\$20,526,496</b>

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

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 18: In-state Attendee Spending State GDP Footprint, FY 2020**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	\$2,209,457	\$827,022	\$827,879	\$3,864,358
Bel Air	\$2,349,984	\$879,622	\$880,534	\$4,110,141
Berlin	\$551,277	\$206,348	\$206,562	\$964,188
Bethesda	\$1,684,276	\$630,441	\$631,095	\$2,945,812
Bromo	\$362,625	\$135,734	\$135,875	\$634,234
Cambridge	\$925,283	\$346,343	\$346,702	\$1,618,328
Chestertown	\$538,664	\$201,627	\$201,836	\$942,128
Crisfield	\$256,284	\$95,930	\$96,029	\$448,243
Cumberland	\$70,133	\$26,251	\$26,279	\$122,663
Denton	\$46,755	\$17,501	\$17,519	\$81,775
Easton	\$893,786	\$334,553	\$334,900	\$1,563,239
Elkton	\$269,310	\$100,805	\$100,910	\$471,026
Frederick	\$5,004,986	\$1,873,416	\$1,875,358	\$8,753,760
Frostburg	\$396,876	\$148,555	\$148,709	\$694,139
Gateway	\$2,931,031	\$1,097,114	\$1,098,252	\$5,126,397
Grantsville	\$121,172	\$45,356	\$45,403	\$211,931
Hagerstown	\$3,985,548	\$1,491,830	\$1,493,377	\$6,970,755
Havre de Grace	\$1,742,557	\$652,256	\$652,933	\$3,047,746
Highlandtown	\$435,107	\$162,865	\$163,034	\$761,005
Leonardtwn	\$666,317	\$249,409	\$249,668	\$1,165,393
Oakland	\$1,366,100	\$521,541	\$509,202	\$2,396,843
Pennsylvania Ave.	\$979	\$366	\$367	\$1,712
Salisbury	\$1,045,057	\$320,715	\$314,569	\$1,680,341
Silver Spring	\$4,088,692	\$1,530,438	\$1,532,025	\$7,151,155
Snow Hill	\$117,432	\$43,956	\$44,001	\$205,389
Station North	\$4,003,445	\$1,498,529	\$1,500,083	\$7,002,057
Stevensville	\$91,553	\$34,269	\$34,305	\$160,127
Wheaton	\$315,652	\$118,152	\$118,274	\$552,078
<b>Total</b>	<b>\$36,470,338</b>	<b>\$13,590,946</b>	<b>\$13,585,680</b>	<b>\$63,646,964</b>

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



**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 19: Overall Attendee State GDP Footprint, FY 2020**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	\$2,922,019	\$1,093,741	\$1,094,875	\$5,110,635
Bel Air	\$3,107,867	\$1,163,305	\$1,164,512	\$5,435,684
Berlin	\$729,067	\$272,897	\$273,180	\$1,275,144
Bethesda	\$2,227,464	\$833,762	\$834,627	\$3,895,853
Bromo	\$479,574	\$179,509	\$179,695	\$838,778
Cambridge	\$1,223,692	\$458,040	\$458,515	\$2,140,247
Chestertown	\$712,386	\$266,653	\$266,930	\$1,245,969
Crisfield	\$338,937	\$126,867	\$126,999	\$592,803
Cumberland	\$92,751	\$34,718	\$34,754	\$162,222
Denton	\$61,834	\$23,145	\$23,169	\$108,148
Easton	\$1,182,037	\$442,448	\$442,907	\$2,067,393
Elkton	\$356,164	\$133,316	\$133,454	\$622,934
Frederick	\$6,619,121	\$2,477,603	\$2,480,172	\$11,576,896
Frostburg	\$524,871	\$196,464	\$196,668	\$918,003
Gateway	\$3,876,305	\$1,450,940	\$1,452,444	\$6,779,688
Grantsville	\$160,251	\$59,984	\$60,046	\$280,280
Hagerstown	\$5,270,909	\$1,972,954	\$1,974,999	\$9,218,861
Havre de Grace	\$2,304,541	\$862,613	\$863,507	\$4,030,661
Highlandtown	\$575,431	\$215,389	\$215,613	\$1,006,433
Leonardtwn	\$881,207	\$329,845	\$330,187	\$1,541,239
Oakland	\$1,806,675	\$689,740	\$673,423	\$3,169,838
Pennsylvania Ave.	\$1,294	\$484	\$485	\$2,264
Salisbury	\$1,382,094	\$424,148	\$416,019	\$2,222,260
Silver Spring	\$5,407,317	\$2,024,013	\$2,026,111	\$9,457,442
Snow Hill	\$155,304	\$58,132	\$58,192	\$271,628
Station North	\$5,294,578	\$1,981,813	\$1,983,868	\$9,260,260
Stevensville	\$121,080	\$45,321	\$45,368	\$211,769
Wheaton	\$417,452	\$156,256	\$156,418	\$730,127
<b>Total</b>	<b>\$48,232,223</b>	<b>\$17,974,101</b>	<b>\$17,967,136</b>	<b>\$84,173,461</b>

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

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 20: Net Business Growth State GDP Impacts, FY 2020**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	-\$607,961	-\$227,921	-\$210,999	-\$1,046,881
Bel Air	\$1,262,284	\$285,003	\$832,208	\$2,379,494
Berlin	\$579,430	\$451,753	\$272,621	\$1,303,804
Bethesda	\$4,260,836	\$2,341,906	\$1,439,225	\$8,041,967
Bromo	\$2,912,048	\$486,905	\$627,551	\$4,026,505
Cambridge	\$167,689	\$83,439	\$69,197	\$320,325
Chestertown	\$2,456,413	\$902,976	\$832,995	\$4,192,384
Crisfield	\$216,018	\$128,486	\$70,155	\$414,659
Cumberland	\$7,145,172	\$2,968,660	\$2,376,965	\$12,490,796
Denton	\$330,705	\$140,493	\$130,115	\$601,313
Easton	\$1,725,139	\$573,698	\$671,524	\$2,970,361
Elkton	-\$141,533	-\$50,592	-\$43,371	-\$235,495
Frederick	-\$705,380	-\$673,182	-\$306,704	-\$1,685,266
Frostburg	\$310,314	\$152,905	\$106,672	\$569,891
Gateway	\$2,038,763	\$742,834	\$761,430	\$3,543,027
Grantsville	\$0	\$0	\$0	\$0
Hagerstown	\$2,633,792	\$1,034,173	\$1,012,666	\$4,680,632
Havre de Grace	\$1,008,006	\$499,583	\$232,879	\$1,740,468
Highlandtown	-\$182,408	-\$56,991	-\$83,189	-\$322,588
Leonardtwn	\$5,493,803	\$2,238,690	\$2,463,445	\$10,195,938
Oakland	\$727,307	\$302,078	\$261,640	\$1,291,025
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	-\$2,027,189	-\$256,515	-\$1,123,034	-\$3,406,737
Silver Spring	\$2,770,853	\$1,566,028	\$1,167,872	\$5,504,753
Snow Hill	\$112,876	\$26,025	\$22,966	\$161,867
Station North	\$3,254,956	\$1,091,700	\$1,150,954	\$5,497,610
Stevensville	\$396,323	\$281,541	\$258,067	\$935,932
Wheaton	\$129,182	\$9,339	\$149,199	\$287,720
<b>Total</b>	<b>\$36,267,439</b>	<b>\$15,043,014</b>	<b>\$13,143,050</b>	<b>\$64,453,502</b>

Sources: IMPLAN, MSAC, RESI

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 21: Full State GDP Footprint for Maryland's A&E Districts, FY 2020**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	\$2,314,058	\$865,820	\$883,876	\$4,063,754
Bel Air	\$4,370,150	\$1,448,308	\$1,996,719	\$7,815,178
Berlin	\$1,308,497	\$724,650	\$545,801	\$2,578,948
Bethesda	\$6,488,300	\$3,175,668	\$2,273,851	\$11,937,820
Bromo	\$3,391,622	\$666,414	\$807,247	\$4,865,283
Cambridge	\$1,391,381	\$541,479	\$527,712	\$2,460,572
Chestertown	\$3,168,799	\$1,169,629	\$1,099,924	\$5,438,353
Crisfield	\$554,955	\$255,354	\$197,154	\$1,007,462
Cumberland	\$7,237,923	\$3,003,377	\$2,411,719	\$12,653,019
Denton	\$392,539	\$163,638	\$153,284	\$709,461
Easton	\$2,907,176	\$1,016,146	\$1,114,431	\$5,037,754
Elkton	\$214,632	\$82,724	\$90,083	\$387,439
Frederick	\$5,913,742	\$1,804,421	\$2,173,468	\$9,891,631
Frostburg	\$835,185	\$349,369	\$303,340	\$1,487,894
Gateway	\$5,915,067	\$2,193,774	\$2,213,874	\$10,322,716
Grantsville	\$160,251	\$59,984	\$60,046	\$280,280
Hagerstown	\$7,904,701	\$3,007,127	\$2,987,665	\$13,899,493
Havre de Grace	\$3,312,548	\$1,362,196	\$1,096,386	\$5,771,129
Highlandtown	\$393,023	\$158,398	\$132,424	\$683,845
Leonardtwn	\$6,375,010	\$2,568,535	\$2,793,632	\$11,737,177
Oakland	\$2,533,983	\$991,818	\$935,063	\$4,460,863
Pennsylvania Ave.	\$1,294	\$484	\$485	\$2,264
Salisbury	-\$645,094	\$167,633	-\$707,015	-\$1,184,477
Silver Spring	\$8,178,170	\$3,590,040	\$3,193,984	\$14,962,194
Snow Hill	\$268,181	\$84,157	\$81,158	\$433,495
Station North	\$8,549,534	\$3,073,513	\$3,134,822	\$14,757,870
Stevensville	\$517,403	\$326,863	\$303,436	\$1,147,701
Wheaton	\$546,634	\$165,595	\$305,617	\$1,017,847
<b>Total</b>	<b>\$84,499,662</b>	<b>\$33,017,115</b>	<b>\$31,110,186</b>	<b>\$148,626,963</b>

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

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**C.3 Employee Compensation**

**Figure 22: Out-of-state Visitor Spending Employee Compensation Impacts, FY 2020**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	\$246,320	\$75,593	\$74,144	\$396,057
Bel Air	\$261,987	\$80,400	\$78,860	\$421,247
Berlin	\$61,459	\$18,861	\$18,499	\$98,819
Bethesda	\$187,771	\$57,624	\$56,520	\$301,915
Bromo	\$40,427	\$12,407	\$12,169	\$65,002
Cambridge	\$103,155	\$31,657	\$31,050	\$165,862
Chestertown	\$60,053	\$18,429	\$18,076	\$96,558
Crisfield	\$28,572	\$8,768	\$8,600	\$45,940
Cumberland	\$7,819	\$2,399	\$2,353	\$12,572
Denton	\$5,212	\$1,600	\$1,569	\$8,381
Easton	\$99,643	\$30,579	\$29,993	\$160,216
Elkton	\$30,024	\$9,214	\$9,037	\$48,275
Frederick	\$557,978	\$171,237	\$167,955	\$897,170
Frostburg	\$44,246	\$13,578	\$13,318	\$71,142
Gateway	\$326,764	\$100,280	\$98,358	\$525,402
Grantsville	\$13,509	\$4,146	\$4,066	\$21,721
Hagerstown	\$444,327	\$136,358	\$133,745	\$714,430
Havre de Grace	\$194,268	\$59,618	\$58,476	\$312,362
Highlandtown	\$48,508	\$14,886	\$14,601	\$77,995
Leonardtwn	\$74,284	\$22,797	\$22,360	\$119,441
Oakland	\$149,694	\$47,603	\$45,605	\$242,902
Pennsylvania Ave.	\$109	\$33	\$33	\$175
Salisbury	\$337,037	\$103,432	\$101,450	\$541,919
Silver Spring	\$455,826	\$139,887	\$137,206	\$732,919
Snow Hill	\$13,092	\$4,018	\$3,941	\$21,050
Station North	\$446,322	\$136,971	\$134,346	\$717,638
Stevensville	\$10,207	\$3,132	\$3,072	\$16,411
Wheaton	\$35,190	\$10,799	\$10,592	\$56,582
<b>Total</b>	<b>\$4,283,801</b>	<b>\$1,316,309</b>	<b>\$1,289,996</b>	<b>\$6,890,105</b>

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

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 23: In-state Attendee Spending Employee Compensation Footprint, FY 2020**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	\$763,770	\$234,392	\$229,899	\$1,228,062
Bel Air	\$812,348	\$249,300	\$244,522	\$1,306,169
Berlin	\$190,567	\$58,483	\$57,362	\$306,411
Bethesda	\$582,225	\$178,677	\$175,253	\$936,155
Bromo	\$125,353	\$38,469	\$37,732	\$201,554
Cambridge	\$319,854	\$98,159	\$96,278	\$514,291
Chestertown	\$186,207	\$57,145	\$56,049	\$299,400
Crisfield	\$88,593	\$27,188	\$26,667	\$142,448
Cumberland	\$24,244	\$7,440	\$7,297	\$38,981
Denton	\$16,162	\$4,960	\$4,865	\$25,988
Easton	\$308,966	\$94,818	\$93,001	\$496,785
Elkton	\$93,096	\$28,570	\$28,022	\$149,688
Frederick	\$1,730,136	\$530,957	\$520,781	\$2,781,874
Frostburg	\$137,193	\$42,103	\$41,296	\$220,592
Gateway	\$1,013,206	\$310,940	\$304,981	\$1,629,127
Grantsville	\$41,887	\$12,855	\$12,608	\$67,350
Hagerstown	\$1,377,734	\$422,809	\$414,706	\$2,215,249
Havre de Grace	\$602,371	\$184,860	\$181,317	\$968,549
Highlandtown	\$150,409	\$46,159	\$45,274	\$241,841
Leonardtwn	\$230,334	\$70,687	\$69,332	\$370,352
Oakland	\$464,159	\$147,603	\$141,408	\$753,171
Pennsylvania Ave.	\$338	\$104	\$102	\$544
Salisbury	\$1,045,057	\$320,715	\$314,569	\$1,680,341
Silver Spring	\$1,413,389	\$433,751	\$425,438	\$2,272,579
Snow Hill	\$40,594	\$12,458	\$12,219	\$65,271
Station North	\$1,383,920	\$424,708	\$416,568	\$2,225,197
Stevensville	\$31,648	\$9,712	\$9,526	\$50,887
Wheaton	\$109,115	\$33,486	\$32,844	\$175,446
<b>Total</b>	<b>\$13,282,876</b>	<b>\$4,081,507</b>	<b>\$3,999,919</b>	<b>\$21,364,302</b>

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

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 24: Overall Attendee Spending Employee Compensation Footprint, FY 2020**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	\$1,010,091	\$309,984	\$304,043	\$1,624,118
Bel Air	\$1,074,335	\$329,700	\$323,381	\$1,727,416
Berlin	\$252,026	\$77,344	\$75,861	\$405,230
Bethesda	\$769,995	\$236,302	\$231,773	\$1,238,070
Bromo	\$165,780	\$50,876	\$49,901	\$266,557
Cambridge	\$423,009	\$129,816	\$127,328	\$680,153
Chestertown	\$246,259	\$75,574	\$74,126	\$395,959
Crisfield	\$117,165	\$35,956	\$35,267	\$188,388
Cumberland	\$32,062	\$9,840	\$9,651	\$51,553
Denton	\$21,375	\$6,560	\$6,434	\$34,369
Easton	\$408,610	\$125,397	\$122,994	\$657,001
Elkton	\$123,120	\$37,784	\$37,060	\$197,963
Frederick	\$2,288,114	\$702,194	\$688,736	\$3,679,043
Frostburg	\$181,439	\$55,681	\$54,614	\$291,734
Gateway	\$1,339,970	\$411,220	\$403,339	\$2,154,530
Grantsville	\$55,396	\$17,000	\$16,675	\$89,071
Hagerstown	\$1,822,060	\$559,168	\$548,451	\$2,929,679
Havre de Grace	\$796,639	\$244,479	\$239,793	\$1,280,911
Highlandtown	\$198,916	\$61,045	\$59,875	\$319,836
Leonardtwn	\$304,618	\$93,483	\$91,692	\$489,793
Oakland	\$613,853	\$195,206	\$187,013	\$996,072
Pennsylvania Ave.	\$447	\$137	\$135	\$719
Salisbury	\$1,382,094	\$424,148	\$416,019	\$2,222,260
Silver Spring	\$1,869,214	\$573,639	\$562,645	\$3,005,498
Snow Hill	\$53,686	\$16,476	\$16,160	\$86,321
Station North	\$1,830,242	\$561,679	\$550,914	\$2,942,835
Stevensville	\$41,855	\$12,845	\$12,599	\$67,299
Wheaton	\$144,306	\$44,286	\$43,437	\$232,028
<b>Total</b>	<b>\$17,566,677</b>	<b>\$5,397,816</b>	<b>\$5,289,914</b>	<b>\$28,254,407</b>

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

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 25: Net Business Growth Employee Compensation Impacts, FY 2020**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	-\$202,232	-\$60,738	-\$58,581	-\$321,551
Bel Air	\$854,383	\$100,804	\$231,139	\$1,186,326
Berlin	\$191,719	\$130,819	\$75,710	\$398,249
Bethesda	\$906,501	\$595,739	\$400,058	\$1,902,299
Bromo	\$591,744	\$149,042	\$174,302	\$915,088
Cambridge	\$52,128	\$17,051	\$19,241	\$88,420
Chestertown	\$769,536	\$254,495	\$231,284	\$1,255,316
Crisfield	\$46,688	\$30,615	\$19,493	\$96,797
Cumberland	\$1,872,881	\$767,050	\$660,445	\$3,300,376
Denton	\$126,650	\$37,658	\$36,118	\$200,426
Easton	\$681,356	\$154,524	\$186,437	\$1,022,316
Elkton	-\$53,643	-\$14,088	-\$12,018	-\$79,749
Frederick	-\$189,118	-\$140,632	-\$85,243	-\$414,993
Frostburg	\$71,775	\$32,397	\$29,665	\$133,837
Gateway	\$701,672	\$193,248	\$211,479	\$1,106,399
Grantsville	\$0	\$0	\$0	\$0
Hagerstown	\$958,862	\$283,320	\$281,170	\$1,523,353
Havre de Grace	\$197,037	\$119,944	\$64,611	\$381,591
Highlandtown	-\$138,314	-\$37,069	-\$22,958	-\$198,341
Leonardtwn	\$2,325,575	\$644,293	\$684,080	\$3,653,948
Oakland	\$234,781	\$76,873	\$72,664	\$384,317
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	-\$1,482,565	-\$65,827	-\$311,472	-\$1,859,864
Silver Spring	\$849,039	\$428,838	\$324,530	\$1,602,408
Snow Hill	\$41,470	\$12,980	\$6,332	\$60,783
Station North	\$1,140,662	\$304,339	\$319,524	\$1,764,525
Stevensville	\$263,091	\$58,171	\$71,639	\$392,900
Wheaton	\$135,872	\$2,466	\$35,906	\$174,243
<b>Total</b>	<b>\$10,947,551</b>	<b>\$4,076,314</b>	<b>\$3,645,553</b>	<b>\$18,669,418</b>

Sources: IMPLAN, MSAC, RESI

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 26: Full Employee Compensation Footprint of Maryland's A&E Districts, FY 2020**

<b>District</b>	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Annapolis	\$807,858	\$249,246	\$245,463	\$1,302,567
Bel Air	\$1,928,718	\$430,504	\$554,520	\$2,913,742
Berlin	\$443,745	\$208,163	\$151,571	\$803,479
Bethesda	\$1,676,497	\$832,041	\$631,832	\$3,140,369
Bromo	\$757,524	\$199,918	\$224,202	\$1,181,645
Cambridge	\$475,136	\$146,867	\$146,569	\$768,573
Chestertown	\$1,015,796	\$330,069	\$305,409	\$1,651,274
Crisfield	\$163,853	\$66,572	\$54,760	\$285,185
Cumberland	\$1,904,944	\$776,889	\$670,096	\$3,351,929
Denton	\$148,025	\$44,218	\$42,552	\$234,795
Easton	\$1,089,965	\$279,921	\$309,431	\$1,679,317
Elkton	\$69,476	\$23,696	\$25,042	\$118,214
Frederick	\$2,098,996	\$561,562	\$603,492	\$3,264,051
Frostburg	\$253,213	\$88,078	\$84,279	\$425,570
Gateway	\$2,041,643	\$604,468	\$614,818	\$3,260,929
Grantsville	\$55,396	\$17,000	\$16,675	\$89,071
Hagerstown	\$2,780,923	\$842,488	\$829,621	\$4,453,032
Havre de Grace	\$993,676	\$364,423	\$304,404	\$1,662,502
Highlandtown	\$60,603	\$23,976	\$36,917	\$121,496
Leonardtwn	\$2,630,193	\$737,777	\$775,772	\$4,143,741
Oakland	\$848,634	\$272,079	\$259,677	\$1,380,390
Pennsylvania Ave.	\$447	\$137	\$135	\$719
Salisbury	-\$100,471	\$358,320	\$104,547	\$362,397
Silver Spring	\$2,718,254	\$1,002,477	\$887,175	\$4,607,906
Snow Hill	\$95,156	\$29,456	\$22,492	\$147,104
Station North	\$2,970,904	\$866,018	\$870,438	\$4,707,360
Stevensville	\$304,946	\$71,015	\$84,237	\$460,198
Wheaton	\$280,178	\$46,751	\$79,343	\$406,272
<b>Total</b>	<b>\$28,514,228</b>	<b>\$9,474,130</b>	<b>\$8,935,467</b>	<b>\$46,923,826</b>

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



**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**C.4 State and County Tax Revenue Footprint**

**Figure 27: Total State and County Tax Impacts of Out-of-State Visitor Spending, FY 2020**

<b>A&amp;E District</b>	<b>Property</b>	<b>Income</b>	<b>Sales</b>	<b>Payroll</b>	<b>Other</b>	<b>Total</b>
Annapolis	\$32,669	\$14,773	\$39,135	\$208	\$8,621	\$95,406
Bel Air	\$34,747	\$15,713	\$41,624	\$221	\$9,169	\$101,474
Berlin	\$8,151	\$3,686	\$9,765	\$52	\$2,151	\$23,805
Bethesda	\$24,904	\$11,262	\$29,833	\$158	\$6,572	\$72,728
Bromo	\$5,362	\$2,425	\$6,423	\$34	\$1,415	\$15,658
Cambridge	\$13,681	\$6,187	\$16,389	\$87	\$3,610	\$39,954
Chestertown	\$7,965	\$3,602	\$9,541	\$51	\$2,102	\$23,260
Crisfield	\$3,789	\$1,714	\$4,539	\$24	\$1,000	\$11,067
Cumberland	\$1,037	\$469	\$1,242	\$7	\$274	\$3,028
Denton	\$691	\$313	\$828	\$4	\$182	\$2,019
Easton	\$13,216	\$5,976	\$15,831	\$84	\$3,487	\$38,594
Elkton	\$3,982	\$1,801	\$4,770	\$25	\$1,051	\$11,629
Frederick	\$74,005	\$33,465	\$88,651	\$470	\$19,528	\$216,119
Frostburg	\$5,868	\$2,654	\$7,030	\$37	\$1,548	\$17,137
Gateway	\$43,339	\$19,598	\$51,916	\$275	\$11,436	\$126,564
Grantsville	\$1,792	\$810	\$2,146	\$11	\$473	\$5,232
Hagerstown	\$58,931	\$26,649	\$70,594	\$374	\$15,550	\$172,099
Havre de Grace	\$25,766	\$11,651	\$30,865	\$164	\$6,799	\$75,245
Highlandtown	\$6,434	\$2,909	\$7,707	\$41	\$1,698	\$18,788
Leonardtown	\$9,852	\$4,455	\$11,802	\$63	\$2,600	\$28,772
Oakland	\$20,446	\$9,086	\$24,493	\$128	\$5,363	\$59,516
Pennsylvania Ave.	\$14	\$7	\$17	\$0	\$4	\$42
Salisbury	\$44,701	\$20,214	\$53,548	\$284	\$11,795	\$130,543
Silver Spring	\$60,456	\$27,338	\$72,421	\$384	\$15,953	\$176,553
Snow Hill	\$1,736	\$785	\$2,080	\$11	\$458	\$5,071
Station North	\$59,196	\$26,768	\$70,911	\$376	\$15,620	\$172,872
Stevensville	\$1,354	\$612	\$1,622	\$9	\$357	\$3,953
Wheaton	\$4,667	\$2,111	\$5,591	\$30	\$1,232	\$13,630
<b>Total</b>	<b>\$568,754</b>	<b>\$257,030</b>	<b>\$681,318</b>	<b>\$3,612</b>	<b>\$150,047</b>	<b>\$1,660,760</b>

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

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 28: Total State and County Tax Footprint of In-state Visitor Spending, FY 2020**

<b>A&amp;E District</b>	<b>Property</b>	<b>Income</b>	<b>Sales</b>	<b>Payroll</b>	<b>Other</b>	<b>Total</b>
Annapolis	\$101,299	\$45,807	\$121,348	\$644	\$26,730	\$295,828
Bel Air	\$107,742	\$48,721	\$129,066	\$685	\$28,430	\$314,643
Berlin	\$25,275	\$11,429	\$30,277	\$161	\$6,669	\$73,811
Bethesda	\$77,221	\$34,919	\$92,504	\$491	\$20,376	\$225,510
Bromo	\$16,626	\$7,518	\$19,916	\$106	\$4,387	\$48,552
Cambridge	\$42,422	\$19,183	\$50,818	\$270	\$11,194	\$123,888
Chestertown	\$24,697	\$11,168	\$29,584	\$157	\$6,517	\$72,123
Crisfield	\$11,750	\$5,313	\$14,076	\$75	\$3,101	\$34,314
Cumberland	\$3,215	\$1,454	\$3,852	\$20	\$848	\$9,390
Denton	\$2,144	\$969	\$2,568	\$14	\$566	\$6,260
Easton	\$40,978	\$18,530	\$49,088	\$260	\$10,813	\$119,670
Elkton	\$12,347	\$5,583	\$14,791	\$78	\$3,258	\$36,058
Frederick	\$229,468	\$103,765	\$274,883	\$1,458	\$60,550	\$670,125
Frostburg	\$18,196	\$8,228	\$21,797	\$116	\$4,801	\$53,138
Gateway	\$134,382	\$60,767	\$160,978	\$854	\$35,460	\$392,440
Grantsville	\$5,555	\$2,512	\$6,655	\$35	\$1,466	\$16,224
Hagerstown	\$182,729	\$82,630	\$218,894	\$1,161	\$48,217	\$533,631
Havre de Grace	\$79,893	\$36,127	\$95,705	\$508	\$21,082	\$233,314
Highlandtown	\$19,949	\$9,021	\$23,897	\$127	\$5,264	\$58,257
Leonardtwn	\$30,549	\$13,814	\$36,595	\$194	\$8,061	\$89,214
Oakland	\$63,398	\$28,174	\$75,946	\$395	\$16,630	\$184,543
Pennsylvania Ave.	\$45	\$20	\$54	\$0	\$12	\$131
Salisbury	\$138,606	\$62,677	\$166,038	\$881	\$36,574	\$404,777
Silver Spring	\$187,458	\$84,768	\$224,559	\$1,191	\$49,465	\$547,441
Snow Hill	\$5,384	\$2,435	\$6,450	\$34	\$1,421	\$15,723
Station North	\$183,550	\$83,001	\$219,877	\$1,166	\$48,434	\$536,027
Stevensville	\$4,198	\$1,898	\$5,028	\$27	\$1,108	\$12,258
Wheaton	\$14,472	\$6,544	\$17,336	\$92	\$3,819	\$42,263
<b>Total</b>	<b>\$1,763,547</b>	<b>\$796,978</b>	<b>\$2,112,579</b>	<b>\$11,198</b>	<b>\$465,253</b>	<b>\$5,149,556</b>

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

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 29: Total State and County Tax Footprint of All Attendee Spending, FY 2020**

<b>A&amp;E District</b>	<b>Property</b>	<b>Income</b>	<b>Sales</b>	<b>Payroll</b>	<b>Other</b>	<b>Total</b>
Annapolis	\$133,969	\$60,580	\$160,483	\$851	\$35,351	\$391,234
Bel Air	\$142,489	\$64,433	\$170,690	\$905	\$37,599	\$416,117
Berlin	\$33,426	\$15,115	\$40,042	\$212	\$8,820	\$97,616
Bethesda	\$102,125	\$46,181	\$122,337	\$649	\$26,948	\$298,239
Bromo	\$21,987	\$9,943	\$26,339	\$140	\$5,802	\$64,211
Cambridge	\$56,104	\$25,370	\$67,207	\$356	\$14,804	\$163,842
Chestertown	\$32,661	\$14,769	\$39,126	\$208	\$8,618	\$95,382
Crisfield	\$15,540	\$7,027	\$18,615	\$99	\$4,100	\$45,381
Cumberland	\$4,252	\$1,923	\$5,094	\$27	\$1,122	\$12,419
Denton	\$2,835	\$1,282	\$3,396	\$18	\$748	\$8,279
Easton	\$54,194	\$24,506	\$64,920	\$344	\$14,300	\$158,265
Elkton	\$16,329	\$7,384	\$19,561	\$104	\$4,309	\$47,687
Frederick	\$303,473	\$137,230	\$363,535	\$1,928	\$80,078	\$886,244
Frostburg	\$24,064	\$10,882	\$28,827	\$153	\$6,350	\$70,276
Gateway	\$177,721	\$80,365	\$212,894	\$1,129	\$46,896	\$519,004
Grantsville	\$7,347	\$3,322	\$8,801	\$47	\$1,939	\$21,456
Hagerstown	\$241,660	\$109,278	\$289,488	\$1,536	\$63,768	\$705,730
Havre de Grace	\$105,658	\$47,779	\$126,570	\$671	\$27,880	\$308,559
Highlandtown	\$26,382	\$11,930	\$31,604	\$168	\$6,962	\$77,045
Leonardtwn	\$40,402	\$18,270	\$48,398	\$257	\$10,661	\$117,986
Oakland	\$83,845	\$37,260	\$100,439	\$523	\$21,993	\$244,059
Pennsylvania Ave.	\$59	\$27	\$71	\$0	\$16	\$173
Salisbury	\$183,307	\$82,891	\$219,587	\$1,165	\$48,370	\$535,320
Silver Spring	\$247,914	\$112,106	\$296,980	\$1,575	\$65,418	\$723,994
Snow Hill	\$7,120	\$3,220	\$8,530	\$45	\$1,879	\$20,794
Station North	\$242,745	\$109,769	\$290,788	\$1,542	\$64,054	\$708,899
Stevensville	\$5,551	\$2,510	\$6,650	\$35	\$1,465	\$16,212
Wheaton	\$19,139	\$8,655	\$22,927	\$122	\$5,050	\$55,893
<b>Total</b>	<b>\$2,332,301</b>	<b>\$1,054,008</b>	<b>\$2,793,897</b>	<b>\$14,810</b>	<b>\$615,300</b>	<b>\$6,810,316</b>

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

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 30: Total State and County Tax Impact of Net Business Growth, FY 2020**

<b>A&amp;E District</b>	<b>Property</b>	<b>Income</b>	<b>Sales</b>	<b>Payroll</b>	<b>Other</b>	<b>Total</b>
Annapolis	-\$28,886	-\$11,710	-\$34,603	-\$164	-\$7,485	-\$82,848
Bel Air	-\$10,997	\$45,669	-\$13,173	\$663	\$1,325	\$23,486
Berlin	\$16,443	\$15,212	\$19,698	\$205	\$5,084	\$56,642
Bethesda	\$119,764	\$79,472	\$143,467	\$1,084	\$40,084	\$383,872
Bromo	\$79,070	\$34,500	\$94,719	\$496	\$32,066	\$240,850
Cambridge	\$9,691	\$3,810	\$11,609	\$52	\$2,371	\$27,532
Chestertown	\$88,173	\$46,204	\$105,624	\$646	\$26,294	\$266,941
Crisfield	\$12,886	\$3,915	\$15,437	\$52	\$3,143	\$35,432
Cumberland	\$256,523	\$131,359	\$307,292	\$1,816	\$78,956	\$775,946
Denton	\$15,986	\$7,230	\$19,149	\$101	\$4,158	\$46,625
Easton	\$77,888	\$37,162	\$93,303	\$527	\$20,440	\$229,320
Elkton	-\$8,940	-\$2,441	-\$10,710	-\$34	-\$2,129	-\$24,255
Frederick	-\$74,405	-\$17,234	-\$89,131	-\$217	-\$13,540	-\$194,527
Frostburg	\$20,774	\$5,887	\$24,885	\$79	\$4,775	\$56,401
Gateway	\$82,221	\$42,100	\$98,494	\$590	\$23,363	\$246,768
Grantsville	\$0	\$0	\$0	\$0	\$0	\$0
Hagerstown	\$91,003	\$56,139	\$109,014	\$787	\$27,048	\$283,990
Havre de Grace	\$68,719	\$13,194	\$82,320	\$171	\$16,736	\$181,142
Highlandtown	-\$29,344	-\$4,821	-\$35,152	-\$69	-\$5,957	-\$75,342
Leonardtwn	\$160,960	\$136,006	\$192,817	\$1,932	\$47,540	\$539,256
Oakland	\$37,864	\$14,508	\$45,358	\$201	\$9,506	\$107,437
Pennsylvania Ave.	\$0	\$0	\$0	\$0	\$0	\$0
Salisbury	-\$236,256	-\$61,963	-\$283,014	-\$926	-\$50,037	-\$632,195
Silver Spring	\$63,505	\$64,763	\$76,074	\$877	\$20,777	\$225,996
Snow Hill	-\$738	\$1,334	-\$884	\$20	\$487	\$218
Station North	\$140,815	\$63,766	\$168,685	\$901	\$38,234	\$412,401
Stevensville	\$45,558	\$14,380	\$54,575	\$198	\$8,777	\$123,488
Wheaton	-\$10,804	\$7,013	-\$12,942	\$104	-\$1,907	-\$18,536
<b>Total</b>	<b>\$987,476</b>	<b>\$725,454</b>	<b>\$1,182,911</b>	<b>\$10,090</b>	<b>\$330,106</b>	<b>\$3,236,038</b>

Sources: IMPLAN, MSAC, RESI

**FY 2020 Maryland Arts and Entertainment District Economic and Tax Impact Analysis**  
RESI of Towson University

**Figure 31: Total State Tax Footprint of Maryland's A&E Districts, FY 2020**

<b>A&amp;E District</b>	<b>Property</b>	<b>Income</b>	<b>Sales</b>	<b>Payroll</b>	<b>Other</b>	<b>Total</b>
Annapolis	\$105,082	\$48,870	\$125,880	\$688	\$27,865	\$308,386
Bel Air	\$131,492	\$110,102	\$157,517	\$1,568	\$38,924	\$439,603
Berlin	\$49,869	\$30,328	\$59,739	\$417	\$13,905	\$154,258
Bethesda	\$221,889	\$125,653	\$265,804	\$1,733	\$67,032	\$682,110
Bromo	\$101,057	\$44,442	\$121,058	\$636	\$37,868	\$305,060
Cambridge	\$65,795	\$29,180	\$78,816	\$409	\$17,175	\$191,374
Chestertown	\$120,835	\$60,973	\$144,750	\$853	\$34,912	\$362,323
Crisfield	\$28,426	\$10,942	\$34,052	\$150	\$7,243	\$80,812
Cumberland	\$260,775	\$133,282	\$312,387	\$1,843	\$80,078	\$788,364
Denton	\$18,821	\$8,512	\$22,545	\$119	\$4,906	\$54,904
Easton	\$132,082	\$61,669	\$158,223	\$871	\$34,740	\$387,585
Elkton	\$7,389	\$4,943	\$8,851	\$69	\$2,180	\$23,433
Frederick	\$229,068	\$119,996	\$274,404	\$1,712	\$66,538	\$691,717
Frostburg	\$44,838	\$16,769	\$53,712	\$232	\$11,125	\$126,677
Gateway	\$259,942	\$122,465	\$311,388	\$1,719	\$70,259	\$765,773
Grantsville	\$7,347	\$3,322	\$8,801	\$47	\$1,939	\$21,456
Hagerstown	\$332,663	\$165,417	\$398,502	\$2,322	\$90,815	\$989,720
Havre de Grace	\$174,378	\$60,973	\$208,890	\$843	\$44,617	\$489,700
Highlandtown	-\$2,962	\$7,109	-\$3,548	\$99	\$1,004	\$1,703
Leonardtwn	\$201,362	\$154,276	\$241,214	\$2,189	\$58,201	\$657,242
Oakland	\$121,709	\$51,767	\$145,797	\$724	\$31,499	\$351,495
Pennsylvania Ave.	\$59	\$27	\$71	\$0	\$16	\$173
Salisbury	-\$52,948	\$20,928	-\$63,427	\$239	-\$1,667	-\$96,875
Silver Spring	\$311,420	\$176,870	\$373,054	\$2,452	\$86,194	\$949,990
Snow Hill	\$6,383	\$4,554	\$7,646	\$65	\$2,366	\$21,012
Station North	\$383,561	\$173,535	\$459,473	\$2,443	\$102,288	\$1,121,300
Stevensville	\$51,109	\$16,890	\$61,224	\$233	\$10,242	\$139,699
Wheaton	\$8,335	\$15,668	\$9,985	\$226	\$3,143	\$37,357
<b>Total</b>	<b>\$3,319,777</b>	<b>\$1,779,462</b>	<b>\$3,976,809</b>	<b>\$24,900</b>	<b>\$945,406</b>	<b>\$10,046,353</b>

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

## Appendix D—District Websites

**Figure 32: A&E District Websites**

District	County	Website
Annapolis	Anne Arundel	<a href="http://www.annapolisartsdistrict.org">www.annapolisartsdistrict.org</a>
Bel Air	Harford	<a href="http://www.belairartsandentertainment.org">www.belairartsandentertainment.org</a>
Berlin	Worcester	<a href="http://www.berlinmainstreet.com">www.berlinmainstreet.com</a>
Bethesda	Montgomery	<a href="http://www.bethesda.org">www.bethesda.org</a>
Bromo Tower	Baltimore City	<a href="http://www.bromoartsdistrict.org">www.bromoartsdistrict.org</a>
Cambridge	Dorchester	<a href="http://www.choosecambridge.com">www.choosecambridge.com</a>
Chestertown	Kent	<a href="http://www.TownofChestertown.com">www.TownofChestertown.com</a>
Crisfield	Somerset	<a href="http://www.crisfieldarts.org">www.crisfieldarts.org</a>
Cumberland	Allegany	<a href="http://www.alleganyartscouncil.org">www.alleganyartscouncil.org</a>
Denton	Caroline	<a href="http://www.carolinearts.org">www.carolinearts.org</a>
Easton	Talbot	<a href="http://www.discovereaston.com">www.discovereaston.com</a>
Elkton	Cecil	<a href="http://www.elktonarts.com">www.elktonarts.com</a>
Frederick	Frederick	<a href="http://www.frederickartscouncil.org">www.frederickartscouncil.org</a>
Frostburg	Allegany	<a href="http://www.downtownfrostburg.com">www.downtownfrostburg.com</a>
Gateway	Prince George's	<a href="http://www.mygatewayarts.com">www.mygatewayarts.com</a>
Grantsville	Garrett	<a href="http://www.garrettarts.org">www.garrettarts.org</a>
Hagerstown	Washington	<a href="http://www.hagerstownmd.org">www.hagerstownmd.org</a>
Havre de Grace	Harford	<a href="http://www.hdgartscollective.org">www.hdgartscollective.org</a>
Highlandtown	Baltimore City	<a href="http://www.southeastcdc.org">www.southeastcdc.org</a>
Leonardtwn	St. Mary's	<a href="http://www.leonardtwnmd.gov">www.leonardtwnmd.gov</a>
Oakland	Garrett	<a href="http://www.garrettarts.org">www.garrettarts.org</a>
Pennsylvania Ave.	Baltimore City	<a href="http://www.blackartsdistrict.org">www.blackartsdistrict.org</a>
Salisbury	Wicomico	<a href="http://www.salisburyartsdistrict.com">www.salisburyartsdistrict.com</a>
Silver Spring	Montgomery	<a href="http://www.silverspringdowntown.com">www.silverspringdowntown.com</a>
Snow Hill	Worcester	<a href="http://www.snowhillmd.gov">www.snowhillmd.gov</a>
Station North	Baltimore City	<a href="http://www.centralbaltimore.org">www.centralbaltimore.org</a>
Stevensville	Queen Anne's	<a href="http://www.stevensvilleartsandentertainment.org">www.stevensvilleartsandentertainment.org</a>
Wheaton	Montgomery	<a href="http://www.wheatonmd.org">www.wheatonmd.org</a>

Sources: MSAC, RESI

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