

Maryland Arts and Entertainment Districts Impact Analysis FY 2016

Prepared for
Maryland State Arts Council

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1.0 Executive Summary

1.1 Overview

The Maryland State Arts Council (MSAC) sought a report detailing the economic and tax impacts of the 24 Maryland Arts and Entertainment Districts (A&E districts) in existence during the study period, fiscal year (FY) 2016, on Maryland's economy. As one of the first states to develop this designation, Maryland's A&E districts have served as an example for other states developing similar programs.¹

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

This analysis answers the following questions for FY 2016:

1. How many direct, indirect, and induced jobs have the districts created?
2. How much direct, indirect, and induced economic activity (state GDP) have the districts generated?
3. What are the direct, indirect, and induced wage impacts of the districts?
4. How much in tax revenues have the districts generated for the state of Maryland?
5. How do economic and tax impacts for Maryland's A&E districts in FY 2016 compare to the impacts in FY 2014?

1.2 Summary of Findings

Below are RESI's key findings concerning the economic and tax impacts of the A&E districts for FY 2016.² Economic and tax impacts presented in this report are based upon two factors: economic activity from new businesses within districts and spending associated with events and festivals held within districts in FY 2016.

1.2.1 Economic Impacts

- The A&E districts supported an estimated 6,256 direct, 997 indirect, and 1,341 induced jobs, to total 8,594 jobs, during FY 2016.
 - Approximately 800 of these jobs (564 direct, 107 indirect, and 128 induced) were generated by new businesses formed within A&E districts' boundaries.
 - The other 7,795 jobs (5,692 direct, 889 indirect, and 1,213 induced) were supported by visitor spending at events and festivals supported by the A&E districts.

¹ National Assembly of State Arts Agencies, "State Cultural District Programs: Key Issues, Strategies and Management Policies," 12, accessed August 1, 2017, <https://nasaa-arts.org/wp-content/uploads/2017/03/CulturalDistrictsStrategySampler.pdf>.

² While this analysis takes into account as many variables as possible, it is important to note that a number of assumptions and exclusions were made as a result of missing data and other factors.

- The A&E districts supported over \$855.8 million in total state GDP (\$494.2 million in direct state GDP, \$165.5 million in indirect state GDP, and \$196.1 million in induced state GDP) during FY 2016.
 - Approximately \$94.5 million (\$56.7 million in direct state GDP, \$18.9 million in indirect state GDP, and \$18.8 million in induced state GDP) was generated by new businesses formed within A&E districts' boundaries.
 - The other \$761.4 million (\$437.5 million in direct state GDP, \$146.5 million in indirect state GDP, and \$177.3 million in induced state GDP) was supported by visitor spending at events and festivals supported by the A&E districts.
- Nearly \$267.0 million in total wages, comprised of \$162.4 million in direct wages, \$46.6 million in indirect wages, and \$57.9 million in induced wages, was supported by the A&E districts during FY 2016.
 - Approximately \$26.7 million in wages, the sum of \$15.5 million in direct wages, \$5.5 million in indirect wages, and \$5.8 million in induced wages, was generated by new businesses formed within A&E districts' boundaries.
 - The remaining \$240.3 million in wages, comprised of \$146.9 million in direct wages, \$41.2 million in indirect wages, and \$52.2 million in induced wages, was supported by visitor spending at events and festivals supported by the A&E districts.
- When compared to FY 2014, Maryland's A&E districts in FY 2016 supported an additional 2,617 jobs, \$261.6 million in state GDP, and \$60.5 million in wages.

1.2.2 Tax Impacts

- New businesses formed within A&E districts' boundaries during FY 2016 generated nearly \$5.7 million in tax revenues.³
- Visitor spending at events and festivals supported by the A&E districts supported nearly \$57.9 million in tax revenues during FY 2016.
- The total tax revenue impact of the A&E districts came to approximately \$63.5 million during FY 2016.
- When compared to FY 2014, Maryland's A&E districts in FY 2016 contributed an additional \$23.5 million in state and local tax revenues.

³ Total tax revenues refer to property, income, sales, payroll, and other tax revenues supported on the state and local levels.

2.0 Introduction

The Maryland State Arts Council (MSAC) sought a report detailing the economic and tax impacts of the 24 Maryland Arts and Entertainment Districts (A&E districts) in existence during the study period, fiscal year (FY) 2016, on Maryland's economy. As one of the first states to develop this designation, Maryland's A&E districts serve as a case study and leading example for other states.⁴

To achieve the project objective, the Regional Economic Studies Institute (RESI) of Towson University estimated job creation, economic activity (also referred to as output or state GDP), and wages attributable to the A&E districts in FY 2016.⁵ These results were broken down by type of impact (direct, indirect, and induced). RESI also estimated the tax impacts associated with the program.

This analysis answers the following questions:

1. How many direct, indirect, and induced jobs have the districts created?
2. How much direct, indirect, and induced economic activity has the project generated?
3. What are the direct, indirect, and induced wage impacts of the districts?
4. What amount of tax revenues have the districts generated for the State of Maryland?
5. How do economic and tax impacts for Maryland's A&E districts in FY 2016 compare to the impacts in FY 2014?

The report will continue as follows:

- Section 3.0 provides a review of relevant literature to contextualize the analysis.
- Section 4.0 presents the economic and tax impact findings from RESI's analysis. This section also includes a comparative analysis of impacts from FY 2016 and impacts from FY 2014.

To quantify the economic and tax impacts, RESI used the IMPLAN input/output model. For more information regarding IMPLAN, please refer to Appendix B.

3.0 Literature Review

To provide context to the impact analysis, RESI analyzed findings from similar studies of comparable programs and/or designations. Across the nation, the adoption of statewide arts and cultural district programs and the designation of local cultural districts has continued to increase. As of 2015, a total of 13 states (Maryland, Colorado, Indiana, Iowa, Kentucky, Louisiana, Massachusetts, New Mexico, Oklahoma, Rhode Island, South Carolina, Texas, and West Virginia) had functioning statewide cultural district programs.⁶ These 13 states have

⁴ National Assembly of State Arts Agencies, "State Cultural District Programs: Key Issues, Strategies and Management Policies," 12, accessed August 1, 2017, <https://nasaa-arts.org/wp-content/uploads/2017/03/CulturalDistrictsStrategySampler.pdf>.

⁵ For definitions of terms, please refer to Appendix C.

⁶ National Assembly of State Art Agencies, "State Policy Briefs: Tools for Arts Decision Making," 14, 2015, accessed June 29, 2017, https://nasaa-arts.org/nasaa_research/stateculturaldistrictspolicybrief/.

successfully created a total of more than 250 cultural districts across the United States.⁷ California recently designated 14 cultural districts throughout the state and plans to fully implement their program in 2019.⁸ Additionally, Arkansas has created cultural districts legislatively but has not yet implemented their program.⁹

In June 2017, Americans for the Arts released *Arts & Economic Prosperity V*, an update to the organization’s series of publications on the economic impacts of the nonprofit arts and culture industry at the local and national levels.¹⁰ The report’s findings indicate that in 2015, the nonprofit arts and culture industry generated \$166.3 billion in total direct expenditures, supported 4.6 million full-time equivalent jobs, and produced \$96.07 billion in resident household income.¹¹ Furthermore, as detailed in the report, the nonprofit arts and culture industry generated \$25.7 billion in local, state, and federal government tax revenue.¹²

The *Arts & Economic Prosperity V* report also details statewide economic impacts of nonprofit arts and cultural industries.¹³ While these results are not directly comparable with RESI’s analysis, they provide insight to the role of arts and culture industries in various state economies. Figure 1 below summarizes the findings of the *Arts & Economic Prosperity V* report for selected states in the Mid-Atlantic region.¹⁴

Figure 1: Statewide Economic Impact of the Nonprofit Arts and Culture Industry

State	Direct Expenditures	Full-Time Equivalent Jobs	Resident Household Income	State and Local Tax Revenue
Delaware	\$149,903,883	4,062	\$111,640,000	\$10,452,000
District of Columbia	\$2,906,271,526	39,720	\$1,234,017,000	\$193,041,000 ¹⁵
Maryland	\$961,572,264	25,248	\$643,499,000	\$87,366,000
New Jersey	\$519,814,484	14,342	\$340,048,000	\$40,964,000
Pennsylvania	\$3,388,145,326	100,114	\$2,205,857,000	\$402,116,000

Source: Americans for the Arts

⁷ National Assembly of State Art Agencies, “State Policy Briefs: Tools for Arts Decision Making,” 1.

⁸ California Cultural Districts, “14 California Cultural Districts Announced in New Creative Statewide Program,” July 13, 2017, accessed September 11, 2017, <https://www.caculturaldistricts.org/announcement>.

⁹ Ibid.

¹⁰ Americans for the Arts, “Arts & Economic Prosperity V: The Economic Impact of Nonprofit Arts & Cultural Organizations and Their Audiences,” 1, June 2017, accessed June 20, 2017, http://www.americansforthearts.org/sites/default/files/aep5/PDF_Files/NationalFindings_StatisticalReport.pdf.

¹¹ Ibid., 4.

¹² Ibid.

¹³ Ibid., B-53.

¹⁴ Ibid., B-48, B-53.

¹⁵ Government revenue for the District of Columbia reflects only local government revenue due to the absence of state government.

Similarly, to emphasize the role of nonprofit arts and cultural organizations in the national economy, Americans for the Arts compared the percentage of the workforce employed in arts organizations to other selected professions. Employment attributed to nonprofit arts and cultural organizations accounts for 0.83 percent of the United States workforce, a share that is almost twice as large as lawyers, who represent 0.44 percent, and well over double the proportion of farming, fishing, and forestry workers at 0.33 percent.¹⁶ Combined, all arts and cultural sectors accounted for a larger share of national GDP than transportation, construction, or agriculture.¹⁷

At present, initial reported figures for impacts or comparisons associated with arts, culture, and entertainment industries may not be as specific and in-depth as needed to compare directly to RESI's analysis. For example, *Arts and Economic Prosperity V* considered only the direct industry expenditures to determine the economic impacts, whereas RESI considers event-related spending and business openings and closings when determining the economic impacts. Additionally, the results reported in *Arts and Economic Prosperity V* reflect only the impacts of nonprofit organizations, excluding commercial arts and entertainment sectors and individual artist spending in the focus area.¹⁸

The Bureau of Economic Analysis (BEA) has also reported substantial economic growth in the arts and culture industry. In 2014, the arts and culture industry accounted for a total of \$729.6 billion, representing 4.2 percent of GDP.¹⁹ National economic activity due to the arts and culture industry has increased for three consecutive years and grew at a rate of 1.9 percent in 2014.²⁰ The BEA uses the Arts and Cultural Production Satellite Account (ACPSA) to collect and publish data on a broad range of arts and culture industries on national and state economies.²¹ Figure 2 below summarizes the data released by the BEA comparing all arts and cultural production industries for selected states in the Mid-Atlantic region.^{22, 23, 24, 25, 26, 27}

¹⁶ Americans for the Arts, "Arts & Economic Prosperity V," 5.

¹⁷ *Ibid.*, 8.

¹⁸ *Ibid.*, A-2.

¹⁹ Bureau of Economic Analysis, "Arts and Culture Grow for Third Straight Year," 1, 2017, accessed June 20, 2017, https://www.bea.gov/newsreleases/general/acpsa/2017/_pdf/acpsa0417.pdf.

²⁰ *Ibid.*

²¹ Bureau of Economic Analysis, "Arts and Cultural Production Satellite Account," 2017, accessed June 20, 2017, <https://www.bea.gov/regional/arts-and-culture/index.cfm>.

²² *Ibid.*

²³ Bureau of Economic Analysis, "Delaware-2014: Arts and Cultural Production Satellite Account," 2017, accessed August 3, 2017, <https://www.bea.gov/regional/pdf/acpsa/Arts%20-%20Delaware.pdf>.

²⁴ Bureau of Economic Analysis, "District of Columbia-2014: Arts and Cultural Production Satellite Account," 2017, accessed August 3, 2017, <https://www.bea.gov/regional/pdf/acpsa/Arts%20-%20District%20of%20Columbia.pdf>.

²⁵ Bureau of Economic Analysis, "Maryland-2014: Arts and Cultural Production Satellite Account," 2017, accessed August 3, 2017, <https://www.bea.gov/regional/pdf/acpsa/Arts%20-%20Maryland.pdf>.

²⁶ Bureau of Economic Analysis, "New Jersey-2014: Arts and Cultural Production Satellite Account," 2017, accessed August 3, 2017, <https://www.bea.gov/regional/pdf/acpsa/Arts%20-%20New%20Jersey.pdf>.

²⁷ Bureau of Economic Analysis, "Pennsylvania-2014: Arts and Cultural Production Satellite Account," 2017, accessed August 3, 2017, <https://www.bea.gov/regional/pdf/acpsa/Arts%20-%20Pennsylvania.pdf>.

Figure 2: Statewide Economic Comparison of Arts and Cultural Production Industries across Mid-Atlantic States, 2014

State	Employment	Employment Location Quotient	Compensation (in thousands)	Compensation Location Quotient
Delaware	8,996	0.65	\$489,165	0.45
District of Columbia	51,603	2.51	\$6,879,389	2.92
Maryland	80,498	0.95	\$5,696,923	0.87
New Jersey	130,603	0.88	\$10,867,194	0.81
Pennsylvania	169,761	0.85	\$10,676,812	0.74
United States	4,802,813	1.00	\$355,213,442	1.00

Source: BEA ACPSA

As seen in Figure 2, employment and compensation vary widely across the Mid-Atlantic region. To further contextualize the comparison, employment and compensation location quotients are also included. Location quotients indicate a specific industry’s level of concentration, with respect to employment or compensation levels in a region, relative to its concentration in the United States.²⁸ The national location quotient is set to 1.0, and regional location quotients are compared to this benchmark.²⁹ Total national employment and compensation data are also provided for context.

The location quotients in Figure 2 show that the level of employment in Maryland for arts and cultural production industries is 5 percentage points below the national employment concentration of these industries. Compensation in the arts and cultural production industries in Maryland is 13 percentage points below the concentration of national compensation. However, with the exception of Washington, D.C., Maryland’s arts industry as defined by employment and compensation location quotients is stronger than in other regional states.

ACPSA data for state employment and compensation recorded by the BEA include both core and supporting industries. The BEA defines core ACPSA industries as “originators of ideas and content associated with the creation of arts and culture.”³⁰ Supporting ACPSA industries are defined by the BEA as industries that “produce and disseminate arts and cultural commodities.”³¹ As a result, the data summarized above includes a very broad range of industries related to arts and cultural production. The BEA’s findings include impacts far beyond the scope of the *Arts & Economic Prosperity V* report, which only refers to the nonprofit arts and culture industry. However, the BEA’s information helps to paint a picture of the total impact that all arts and cultural production-related industries have on state economies.

²⁸ Bureau of Economic Analysis, “ACPSA Definitions,” 2017, accessed August 3, 2017, <https://www.bea.gov/regional/pdf/acpsa/definitions.pdf>.

²⁹ Ibid.

³⁰ Ibid.

³¹ Ibid.

In contrast, RESI’s analysis estimates the economic impact from Maryland’s state-designated A&E districts. When making these comparisons, it is important to note that definitions of the industry may vary—whether referred to as the “arts industry,” “cultural industry,” or “creative industry.” While there are limitations associated with comparing other research to RESI’s findings, this comparison can help to frame the industry analysis. As these designations become more widespread, further research regarding their impacts will become available.

4.0 Findings

4.1 Economic Impacts

To determine the economic impacts of Maryland’s A&E districts in FY 2016, RESI used data from annual reports that A&E districts submitted to MSAC, which MSAC then provided to RESI. For information regarding the data provided in the annual report, please refer to Appendix D. A summary of the total economic impacts—generated by new businesses as well as visitor spending at events and festivals—in the A&E districts can be found below in Figure 3. Economic impacts for FY 2016 are presented in 2017 dollars.

Figure 3: Total Economic Impact Summary, FY 2016³²

District	Designation Year	Employment	State GDP	Wages
Annapolis	2008	716	\$69,407,527	\$21,109,099
Bel Air	2010	689	\$65,531,783	\$20,214,853
Berlin	2005	109	\$10,860,124	\$3,442,101
Bethesda	2002	453	\$53,441,575	\$15,410,995
Bromo Tower	2013	32	\$2,826,185	\$569,305
Cambridge	2003	258	\$25,764,764	\$8,018,421
Chestertown	2015	143	\$13,642,303	\$4,331,191
Cumberland	2002	245	\$25,416,102	\$7,718,071
Denton	2005	55	\$5,559,797	\$5,559,797
Elkton	2006	130	\$13,678,919	\$4,298,122
Frederick	2003	1,550	\$152,847,945	\$47,694,532
Frostburg	2009	46	\$4,619,285	\$1,446,987
Gateway	2002	891	\$88,736,590	\$27,340,332
Grantsville	2015	55	\$5,474,557	\$1,712,717
Hagerstown	2002	476	\$49,565,042	\$15,028,478
Havre de Grace	2008	387	\$41,722,039	\$12,110,551
Highlandtown	2003	34	\$2,544,054	\$799,622
Leonardtwn	2014	176	\$18,640,734	\$5,673,702
Salisbury	2007	128	\$13,153,527	\$4,211,373
Silver Spring	2002	1,375	\$132,195,384	\$41,428,740
Snow Hill	2006	14	\$995,985	\$185,452
Station North	2002	420	\$40,008,936	\$12,394,417
Stevensville	2014	51	\$4,796,017	\$1,463,261
Wheaton	2006	158	\$14,395,965	\$4,823,589
Total		8,594	\$855,825,139	\$266,985,708

Sources: IMPLAN, RESI

According to RESI’s analysis of provided data for FY 2016, the A&E districts collectively supported 8,594 jobs, over \$855.8 million in state GDP, and nearly \$267.0 million in wages. Impacts are presented in 2017 dollars. For a breakdown of statewide impacts, please see Figure 4.

³² Summed figures throughout the report may not add up exactly to totals due to rounding.

Figure 4: Statewide Economic Impacts of Maryland’s A&E Districts by Type of Activity, FY 2016

	Impact			Total
	Direct	Indirect	Induced	
<i>New Businesses</i>				
Employment	564	107	128	800
State GDP	\$56,748,656	\$18,933,527	\$18,780,759	\$94,462,942
Wages	\$15,512,100	\$5,461,518	\$5,761,339	\$26,734,957
<i>Visitor Spending at Events/Festivals</i>				
Employment	5,692	889	1,213	7,795
State GDP	\$437,508,214	\$146,523,705	\$177,330,278	\$761,362,197
Wages	\$146,935,544	\$41,159,832	\$52,155,376	\$240,250,752
<i>New Businesses + Visitor Spending at Events/Festivals</i>				
Employment	6,256	997	1,341	8,594
State GDP	\$494,256,871	\$165,457,231	\$196,111,037	\$855,825,139
Wages	\$162,447,644	\$46,621,350	\$57,916,714	\$266,985,708

Sources: BLS, IMPLAN, RESI

As seen in Figure 4, total impacts are driven largely by direct spending at events and festivals. The direct, indirect, induced, and total economic impacts specified for each district by activity type (new businesses and event/festival spending) can be found in Appendix A. For information regarding RESI’s methodology and assumptions, please refer to Appendix B.

4.2 Tax Impacts

RESI also estimated the total tax impacts associated with all 24 A&E districts, found in Figure 5. Input data were provided by districts through annual reports to MSAC, which MSAC provided to RESI.

Figure 5: Statewide Tax Impacts by Type of Activity in Maryland’s A&E Districts, FY 2016

	Tax Impact (2017 Dollars)					Total
	Property ³³	Income	Sales	Payroll	Other	
New Businesses	\$1,866,259	\$1,001,077	\$1,939,900	\$44,526	\$800,949	\$5,652,711
Event Attendance	\$19,958,809	\$9,475,070	\$20,760,848	\$411,658	\$7,244,631	\$57,851,016
Total	\$21,825,068	\$10,476,147	\$22,700,748	\$456,184	\$8,045,580	\$63,503,727

Sources: IMPLAN, RESI

As seen in Figure 5, Maryland’s 24 A&E districts supported over \$63.5 million in state and local tax revenues in FY 2016. The impacts from visitor spending at events and festivals were larger

³³ Tax impacts—specifically, property tax revenues—would traditionally be compared against estimated tax revenue losses associated with the property tax incentives available to and used by A&E districts. Data from the A&E district annual reports indicated that two properties submitted applications for the tax incentive, but neither the annual reports nor information from the State Department of Assessments and Taxation indicated that this application was approved. As a result, RESI omitted this consideration for the analysis. For more information regarding RESI’s reasoning, please refer to Appendix B.

than the impacts from new businesses in the districts. Sales tax revenues represented the plurality of the impacts, followed by property tax revenues.

RESI also estimated the total tax impacts by district, which are presented in Figure 6 below .

Figure 6: Total Tax Impact by District, FY 2016

District	Tax Impact (2017 Dollars)					Total
	Property	Income	Sales	Payroll	Other	
Annapolis	\$1,648,944	\$862,970	\$1,714,263	\$36,581	\$622,391	\$4,885,149
Bel Air	\$1,827,314	\$806,897	\$1,901,459	\$35,031	\$649,168	\$5,219,869
Berlin	\$281,632	\$137,402	\$292,906	\$5,965	\$102,871	\$820,776
Bethesda	\$1,161,009	\$611,829	\$1,206,949	\$26,706	\$465,266	\$3,471,759
Bromo Tower	\$42,393	\$8,906	\$44,228	\$987	\$19,893	\$116,407
Cambridge	\$637,612	\$321,370	\$663,013	\$13,896	\$237,249	\$1,873,140
Chestertown	\$330,639	\$170,396	\$343,768	\$7,505	\$123,047	\$975,355
Cumberland	\$577,473	\$307,345	\$600,287	\$13,375	\$222,654	\$1,721,134
Denton	\$134,526	\$71,854	\$139,837	\$3,147	\$51,169	\$400,533
Elkton	\$369,229	\$167,647	\$384,157	\$7,448	\$132,918	\$1,061,399
Frederick	\$4,061,797	\$1,905,415	\$4,225,288	\$82,651	\$1,468,342	\$11,743,493
Frostburg	\$124,718	\$57,674	\$129,749	\$2,508	\$44,890	\$359,539
Gateway	\$2,496,477	\$1,071,794	\$2,598,132	\$47,379	\$888,068	\$7,101,850
Grantsville	\$146,423	\$69,097	\$152,312	\$2,967	\$52,797	\$423,596
Hagerstown	\$1,198,648	\$608,581	\$1,246,350	\$26,044	\$454,298	\$3,533,921
Havre de Grace	\$967,396	\$482,863	\$1,005,993	\$20,987	\$382,336	\$2,859,575
Highlandtown	\$53,068	\$30,637	\$55,136	\$1,386	\$20,209	\$160,436
Leonardtwn	\$445,985	\$225,401	\$463,745	\$9,833	\$170,299	\$1,315,263
Salisbury	\$340,929	\$166,191	\$354,578	\$7,298	\$124,461	\$993,457
Silver Spring	\$3,459,506	\$1,644,922	\$3,598,495	\$71,794	\$1,257,252	\$10,031,969
Snow Hill	\$12,927	\$10,867	\$13,391	\$322	\$6,354	\$43,861
Station North	\$1,002,491	\$495,934	\$1,042,540	\$21,479	\$369,371	\$2,931,815
Stevensville	\$122,126	\$62,359	\$126,982	\$2,537	\$45,366	\$359,370
Wheaton	\$381,806	\$177,796	\$397,190	\$8,358	\$134,911	\$1,100,061
Total	\$21,825,068	\$10,476,147	\$22,700,748	\$456,184	\$8,045,580	\$63,503,727

Source: IMPLAN

As seen in Figure 6, reported business growth and visitor spending in Frederick had the largest tax impact across all of Maryland’s A&E districts. In FY 2016, reported activity in Frederick supported more than \$11.7 million dollars in tax revenues, comprised primarily of sales and property tax revenues. Reported activity in Silver Spring generated the second-highest amount of tax impacts. For more information regarding tax impacts by district, please see Appendix A.

4.3 Comparative Impact Analysis: FY 2014 and FY 2016

To better contextualize the impacts of Maryland’s A&E districts in FY 2016, RESI compared the economic and tax impact results of this FY 2016 study to the results of RESI’s FY 2014 economic and tax impact study of A&E districts.

4.3.1 Comparative Economic Impact Analysis

This section presents the comparative economic impact analysis between impacts generated in FY 2014 and FY 2016. To complete the analysis, RESI first adjusted the FY 2014 impacts for inflation, using the Bureau of Labor Statistics (BLS) CPI-Inflation Calculator.^{34,35} Figure 7 presents the FY 2014 impacts in 2015 dollars (prior to adjustment for inflation), while Figure 8 presents the impacts after adjustment for inflation. Please note that Chestertown and Grantsville had not yet received A&E district designation as of FY 2014 and therefore did not generate economic impacts in FY 2014.

Figure 7: Total Economic Impact of Maryland’s A&E Districts, FY 2014 (2015 Dollars)

A&E District	FY 2014 (2015 Dollars)		
	Employment	State GDP	Wages
Annapolis	62	\$ 6,221,185	\$ 2,386,226
Bel Air	522	\$ 51,533,976	\$ 17,317,867
Berlin	199	\$ 18,960,288	\$ 6,349,766
Bethesda	632	\$ 61,385,195	\$ 20,787,939
Bromo Tower	14	\$ 2,410,358	\$ 846,162
Cambridge	98	\$ 9,739,339	\$ 3,582,335
*Chestertown	N/A	N/A	N/A
Cumberland	364	\$ 37,309,615	\$ 12,873,199
Denton	38	\$ 3,399,364	\$ 1,176,631
Elkton	87	\$ 8,092,239	\$ 2,742,363
Frederick	932	\$ 83,212,430	\$ 28,903,939
Frostburg	44	\$ 4,638,991	\$ 1,485,007
Gateway	52	\$ 4,951,084	\$ 1,744,527
*Grantsville	N/A	N/A	N/A
Hagerstown	298	\$ 26,785,925	\$ 9,235,623
Havre de Grace	152	\$ 13,808,946	\$ 4,775,061
Highlandtown	95	\$ 9,114,963	\$ 3,284,303
Leonardtwn	198	\$ 18,734,666	\$ 6,501,109
Salisbury	254	\$ 26,194,148	\$ 9,141,512
Silver Spring	1,395	\$136,562,196	\$ 48,285,894
Snow Hill	18	\$ 1,782,591	\$ 607,955
Station North	341	\$ 29,704,697	\$ 10,321,727
Stevensville	6	\$ 476,566	\$ 164,909
Wheaton	174	\$ 16,338,678	\$ 5,991,571
Total	5,977	\$571,357,436	\$198,505,625

Sources: IMPLAN, RESI

³⁴ Daraius Irani and Jessica Grimm, “Maryland Arts and Entertainment Districts Impact Analysis FY 2014,” Regional Economic Studies Institute of Towson University, April 1, 2015, accessed July 10, 2017, https://issuu.com/marylandarts/docs/msac_2014_resi_impact_analysis_fina_dd10052c89000a.

³⁵ FY 2014 impacts were calculated based on the most recently available data at the time of analysis. FY 2016 impacts were calculated using IMPLAN’s 2015 model for the state of Maryland.

The economic impacts from FY 2014 were adjusted for inflation using the BLS CPI-Inflation Calculator. The FY 2014 impacts are presented in 2017 dollars in Figure 8.

Figure 8: Total Economic Impact of Maryland’s A&E Districts, FY 2014 (2017 Dollars)

A&E District	FY 2014 (2017 Dollars)		
	Employment	State GDP	Wages
Annapolis	62	\$6,470,032	\$2,481,675
Bel Air	522	\$53,595,335	\$18,010,581
Berlin	199	\$19,718,700	\$6,603,757
Bethesda	632	\$63,840,602	\$21,619,456
Bromo Tower	14	\$2,506,772	\$880,008
Cambridge	98	\$10,128,912	\$3,725,629
*Chestertown	N/A	N/A	N/A
Cumberland	364	\$38,801,999	\$13,388,127
Denton	38	\$3,535,339	\$1,223,696
Elkton	87	\$8,415,928	\$2,852,058
Frederick	932	\$86,540,927	\$30,060,097
Frostburg	44	\$4,824,551	\$1,544,407
Gateway	52	\$5,149,127	\$1,814,308
*Grantsville	N/A	N/A	N/A
Hagerstown	298	\$27,857,362	\$9,605,048
Havre de Grace	152	\$14,361,304	\$4,966,063
Highlandtown	95	\$9,479,561	\$3,415,675
Leonardtwn	198	\$19,484,053	\$6,761,154
Salisbury	254	\$27,241,914	\$9,507,173
Silver Spring	1,395	\$142,024,684	\$50,217,330
Snow Hill	18	\$1,853,895	\$632,274
Station North	341	\$30,892,884	\$10,734,596
Stevensville	6	\$495,629	\$171,505
Wheaton	174	\$16,992,225	\$6,231,234
Total	5,977	\$594,211,734	\$206,445,850

Sources: BLS, IMPLAN, RESI

RESI then compared the change in total economic impact (the sum of direct, indirect, and induced impacts for both business growth and visitor spending at events and festivals) from FY 2014 to FY 2016 for each district, as shown in Figure 9. For this calculation, RESI subtracted the impacts generated in FY 2014 (adjusted for inflation to 2017 dollars) from the impacts generated in FY 2016 and reported in 2017 dollars. For detailed impacts, please see Appendix A. Please note that Chestertown and Grantsville had not received A&E district designation in FY 2014, as indicated by an asterisk (*), and are only included in the 24-district total.

Figure 9: Change in Total Economic Impact of Maryland's A&E Districts, FY 2014-FY 2016

District	FY 2014 to FY 2016 Change (2017 Dollars)		
	Employment	State GDP	Wages
Annapolis	654	\$62,937,494	\$18,627,424
Bel Air	167	\$11,936,448	\$2,204,271
Berlin	-89	-\$8,858,575	-\$3,161,656
Bethesda	-179	-\$10,399,027	-\$6,208,461
Bromo Tower	18	\$319,413	-\$310,703
Cambridge	160	\$15,635,851	\$4,292,792
*Chestertown	*143	*\$13,642,303	*\$4,331,191
Cumberland	-119	-\$13,385,897	-\$5,670,056
Denton	17	\$2,024,459	\$4,336,102
Elkton	43	\$5,262,990	\$1,446,064
Frederick	619	\$66,307,018	\$17,634,435
Frostburg	2	-\$205,266	-\$97,420
Gateway	839	\$83,587,463	\$25,526,024
*Grantsville	*55	*\$5,474,557	*\$1,712,717
Hagerstown	178	\$21,707,681	\$5,423,431
Havre de Grace	235	\$27,360,735	\$7,144,488
Highlandtown	-61	-\$6,935,507	-\$2,616,053
Leonardtwn	-23	-\$843,319	-\$1,087,452
Salisbury	-127	-\$14,088,387	-\$5,295,800
Silver Spring	-20	-\$9,829,300	-\$8,788,591
Snow Hill	-4	-\$857,910	-\$446,821
Station North	80	\$9,116,051	\$1,659,822
Stevensville	45	\$4,300,389	\$1,291,755
Wheaton	-16	-\$2,596,260	-\$1,407,645
Total, 22 Districts	2,418	\$242,496,545	\$54,495,950
*Total, 24 Districts	2,617	\$261,613,406	\$60,539,858

Sources: BLS, IMPLAN, RESI

As shown in Figure 9, in FY 2016, growth in the 22 A&E districts that existed in FY 2014 and FY 2016 supported a total of 2,418 jobs, \$242.5 million in state GDP, and \$54.5 million in wages. When Chestertown and Grantsville are included, the growth in impact increases to 2,617 jobs, \$261.6 million in state GDP, and \$60.5 million in economic impact.

Annapolis, Bel Air, Cambridge, Denton, Elkton, Frederick, Gateway, Hagerstown, Havre de Grace, Station North, and Stevensville had increased economic activity across all categories in FY 2016 as compared to FY 2014. The greatest amount of growth occurred in Gateway, which saw an increase of 839 jobs, \$83.6 million in state GDP, and \$25.5 million in wages, due in large part to greatly increased event attendance.

Bromo Tower and Frostburg both saw higher levels of total employment in FY 2016 as compared to FY 2014. However, both had lower total wage impacts in FY 2016 than in FY 2014. In these cases, the impacts associated with industries where jobs were gained or lost can provide insight as to why there is a positive change in employment but a negative change in state GDP and wages. For example, if a job is lost in an industry with a high multiplier, like Professional and Business Services, but two jobs are gained in an industry with a lower multiplier, such as Accommodation and Food Services, the change in employment would be positive, while the change in state GDP and/or wages could be negative.

For a more detailed analysis at the state level, RESI then considered the change in economic impact resulting from business growth and visitor spending at district events and festivals. Statewide impacts are presented in Figure 10. A summary of the change in total impacts from FY 2014 to FY 2016 is presented in Figure 11. For information at the district level, please see Appendix A.

Figure 10: Change in Statewide Economic Impact by Type of Activity of Maryland’s A&E Districts, FY 2014-FY 2016

	Change in Impact (Jobs or 2017 Dollars)			Total
	Direct	Indirect	Induced	
<i>New Businesses</i>				
Employment	-268	-42	-102	-412
State GDP	-\$28,602,024	-\$5,304,163	-\$14,023,528	-\$47,929,714
Wages	-\$17,784,017	-\$2,732,261	-\$4,877,965	-\$25,394,243
<i>Visitor Spending at Events/Festivals</i>				
Employment	2,135	370	524	3,029
State GDP	\$165,002,375	\$65,318,154	\$79,222,590	\$309,543,120
Wages	\$50,858,996	\$14,739,991	\$20,335,114	\$85,934,101
Total, New Businesses + Visitor Spending at Events/Festivals				
Employment	1,867	328	422	2,617
State GDP	\$136,400,351	\$60,013,992	\$65,199,062	\$261,613,406
Wages	\$33,074,979	\$12,007,730	\$15,457,149	\$60,539,858

Sources: BLS, IMPLAN, RESI

Figure 11: Summary of Change in Statewide Economic Impact of Maryland’s A&E Districts, FY2014-2016 (2017 Dollars)

	FY 2014 (22 Districts)	FY 2016 (24 Districts)	Total Change
Employment	5,977	8,594	2,617
State GDP	\$594,211,734	\$855,825,139	\$261,613,406
Wages	\$206,445,850	\$266,985,708	\$60,539,858

Sources: BLS, IMPLAN, RESI

As seen in Figure 10, decreased activity from new businesses was more than offset by increased activity from visitor spending at events and festivals in FY 2016 as compared to FY 2014. Please note that these impacts consider the economic impact at the state level and thus include 22 districts in FY 2014 and 24 districts in FY 2016, a summary of which is presented in Figure 11.

4.3.2 Comparative Tax Impact Analysis

To compare the tax impacts from FY 2014 to FY 2016, impacts for FY 2014 were adjusted for inflation from 2015 dollars to 2017 dollars using the BLS CPI-Inflation Calculator.³⁶ The tax impacts prior to adjustment for inflation are presented in Figure 12; the tax impacts that have been adjusted for inflation are presented in Figure 13.

Figure 12: Total Tax Impact of Maryland’s A&E Districts, FY 2014 (2015 Dollars)

District	Tax Revenue Type, FY 2014 (2015 Dollars)					Total
	Property	Income	Sales	Payroll	Other	
Annapolis	\$131,388	\$83,554	\$112,691	\$3,727	\$47,496	\$378,856
Bel Air	\$1,368,523	\$614,981	\$1,176,649	\$27,048	\$441,115	\$3,628,316
Berlin	\$505,350	\$225,511	\$434,514	\$9,918	\$160,714	\$1,336,007
Bethesda	\$1,507,066	\$757,012	\$1,294,869	\$32,467	\$518,316	\$4,109,730
Bromo Tower	-\$25,218	\$33,733	-\$22,189	\$1,321	\$7,226	-\$5,127
Cambridge	\$225,555	\$128,297	\$193,626	\$5,596	\$78,112	\$631,186
*Chestertown	N/A	N/A	N/A	N/A	N/A	N/A
Cumberland	\$615,266	\$457,192	\$526,967	\$20,106	\$252,582	\$1,872,113
Denton	\$87,911	\$41,935	\$75,558	\$1,838	\$28,349	\$235,591
Elkton	\$228,421	\$97,018	\$196,459	\$4,283	\$70,947	\$597,128
Frederick	\$2,197,170	\$1,031,480	\$1,888,616	\$45,144	\$701,764	\$5,864,174
Frostburg	\$109,006	\$53,855	\$93,669	\$2,319	\$36,878	\$295,727
Gateway	\$104,296	\$62,187	\$89,500	\$2,725	\$38,326	\$297,034
*Grantsville	N/A	N/A	N/A	N/A	N/A	N/A
Hagerstown	\$694,372	\$329,056	\$596,826	\$14,425	\$223,417	\$1,858,096
Havre de Grace	\$383,649	\$168,851	\$329,900	\$7,459	\$120,562	\$1,010,421
Highlandtown	\$257,046	\$167,430	\$236,066	\$109,555	\$152,934	\$495,587
Leonardtwn	\$475,448	\$235,448	\$408,541	\$10,154	\$155,659	\$1,285,250
Salisbury	\$589,427	\$326,331	\$506,093	\$14,278	\$207,963	\$1,644,092
Silver Spring	\$3,517,627	\$1,716,664	\$3,022,905	\$75,416	\$1,153,981	\$9,486,593
Snow Hill	\$48,501	\$22,095	\$41,697	\$951	\$15,738	\$128,982
Station North	\$761,658	\$369,014	\$654,567	\$16,120	\$246,689	\$2,048,048
Stevensville	\$13,504	\$6,168	\$11,610	\$258	\$4,373	\$35,913
Wheaton	\$473,555	\$214,757	\$407,138	\$9,358	\$146,394	\$1,251,202
Total	\$14,269,521	\$7,142,569	\$12,276,272	\$414,466	\$4,809,535	\$38,484,919

Sources: IMPLAN, RESI

The tax impacts presented in Figure 12 were adjusted for inflation by using the BLS CPI-Inflation Calculator and are presented below in Figure 13.

³⁶ FY 2014 impacts were calculated based on the most recently available data at the time of analysis. FY 2016 impacts were calculated using IMPLAN’s 2015 model for the state of Maryland.

Figure 13: Total Tax Impact of Maryland’s A&E Districts, FY 2014 (2017 Dollars)

District	FY 2014 Impacts Adjusted to 2017 Dollars					Total
	Property	Income	Sales	Payroll	Other	
Annapolis	\$136,644	\$86,896	\$117,199	\$3,876	\$49,396	\$394,010
Bel Air	\$1,423,264	\$639,580	\$1,223,715	\$28,130	\$458,760	\$3,773,449
Berlin	\$525,564	\$234,531	\$451,895	\$10,315	\$167,143	\$1,389,447
Bethesda	\$1,567,349	\$787,292	\$1,346,664	\$33,766	\$539,049	\$4,274,119
Bromo Tower	-\$26,227	\$35,082	-\$23,077	\$1,374	\$7,515	-\$5,332
Cambridge	\$234,577	\$133,429	\$201,371	\$5,820	\$81,236	\$656,433
Chestertown	N/A	N/A	N/A	N/A	N/A	N/A
*Cumberland	\$639,877	\$475,480	\$548,046	\$20,910	\$262,685	\$1,946,998
Denton	\$91,427	\$43,612	\$78,580	\$1,912	\$29,483	\$245,015
Elkton	\$237,558	\$100,899	\$204,317	\$4,454	\$73,785	\$621,013
Frederick	\$2,285,057	\$1,072,739	\$1,964,161	\$46,950	\$729,835	\$6,098,741
Frostburg	\$113,366	\$56,009	\$97,416	\$2,412	\$38,353	\$307,556
Gateway	\$108,468	\$64,674	\$93,080	\$2,834	\$39,859	\$308,915
*Grantsville	N/A	N/A	N/A	N/A	N/A	N/A
Hagerstown	\$722,147	\$342,218	\$620,699	\$15,002	\$232,354	\$1,932,420
Havre de Grace	\$398,995	\$175,605	\$343,096	\$7,757	\$125,384	\$1,050,838
Highlandtown	\$267,328	\$174,127	\$245,509	\$113,937	\$159,051	\$515,410
Leonardtwn	\$494,466	\$244,866	\$424,883	\$10,560	\$161,885	\$1,336,660
Salisbury	\$613,004	\$339,384	\$526,337	\$14,849	\$216,282	\$1,709,856
Silver Spring	\$3,658,332	\$1,785,331	\$3,143,821	\$78,433	\$1,200,140	\$9,866,057
Snow Hill	\$50,441	\$22,979	\$43,365	\$989	\$16,368	\$134,141
Station North	\$792,124	\$383,775	\$680,750	\$16,765	\$256,557	\$2,129,970
Stevensville	\$14,044	\$6,415	\$12,074	\$268	\$4,548	\$37,350
Wheaton	\$492,497	\$223,347	\$423,424	\$9,732	\$152,250	\$1,301,250
Total	\$14,840,302	\$7,428,272	\$12,767,323	\$431,045	\$5,001,916	\$40,024,316

Sources: BLS, IMPLAN, RESI

As seen in Figure 13, the total tax impact of Maryland’s 22 A&E districts in FY 2014 (when reported in 2017 dollars) was \$40.0 million. This total includes direct, indirect, and induced impacts for property, income, sales, payroll, and other state and local taxes in Maryland, for both new businesses and visitor spending at events and festivals. Silver Spring supported the plurality of these impacts.

For the comparative tax impact analysis, RESI subtracted the tax impacts reported in FY 2014 (in 2017 dollars) from the tax impacts reported in FY 2016 and presented in 2017 dollars (please see Figure 6). The change in tax impacts from FY 2014 to FY 2016 is presented in Figure 14. For detailed impacts, please see Appendix A. Please note that Chestertown and Grantsville had not received A&E district designation in FY 2014, as indicated by an asterisk (*), and are only included in the 24-district total.

Figure 14: Change in Total Tax Impact of Maryland's A&E Districts, FY 2014-FY 2016

District	FY 2014 to FY 2016 Change (2017 Dollars)					Total
	Property	Income	Sales	Payroll	Other	
Annapolis	\$1,512,300	\$776,074	\$1,597,064	\$32,705	\$572,995	\$4,491,139
Bel Air	\$404,050	\$167,317	\$677,744	\$6,901	\$190,408	\$1,446,420
Berlin	-\$243,932	-\$97,129	-\$158,989	-\$4,350	-\$64,272	-\$568,671
Bethesda	-\$406,340	-\$175,463	-\$139,715	-\$7,060	-\$73,783	-\$802,360
Bromo Tower	\$68,620	-\$26,176	\$67,305	-\$387	\$12,378	\$121,739
Cambridge	\$403,035	\$187,941	\$461,642	\$8,076	\$156,013	\$1,216,707
*Chestertown	\$330,639	\$170,396	\$343,768	\$7,505	\$123,047	\$975,355
Cumberland	-\$62,404	-\$168,135	\$52,241	-\$7,535	-\$40,031	-\$225,864
Denton	\$43,099	\$28,242	\$61,257	\$1,235	\$21,686	\$155,518
Elkton	\$131,671	\$66,748	\$179,840	\$2,994	\$59,133	\$440,386
Frederick	\$1,776,740	\$832,676	\$2,261,127	\$35,701	\$738,507	\$5,644,752
Frostburg	\$11,352	\$1,665	\$32,333	\$96	\$6,537	\$51,983
Gateway	\$2,388,009	\$1,007,120	\$2,505,052	\$44,545	\$848,209	\$6,792,935
*Grantsville	\$146,423	\$69,097	\$152,312	\$2,967	\$52,797	\$423,596
Hagerstown	\$476,501	\$266,363	\$625,651	\$11,042	\$221,944	\$1,601,501
Havre de Grace	\$568,401	\$307,258	\$662,897	\$13,230	\$256,952	\$1,808,737
Highlandtown	-\$214,260	-\$143,490	-\$190,373	-\$112,551	-\$138,842	-\$354,974
Leonardtwn	-\$48,481	-\$19,465	\$38,862	-\$727	\$8,414	-\$21,397
Salisbury	-\$272,075	-\$173,193	-\$171,759	-\$7,551	-\$91,821	-\$716,399
Silver Spring	-\$198,826	-\$140,409	\$454,674	-\$6,639	\$57,112	\$165,912
Snow Hill	-\$37,514	-\$12,112	-\$29,974	-\$667	-\$10,014	-\$90,280
Station North	\$210,367	\$112,159	\$361,790	\$4,714	\$112,814	\$801,845
Stevensville	\$108,082	\$55,944	\$114,908	\$2,269	\$40,818	\$322,020
Wheaton	-\$110,691	-\$45,551	-\$26,234	-\$1,374	-\$17,339	-\$201,189
Total, 22 Districts	\$6,507,704	\$2,808,382	\$9,437,345	\$14,667	\$2,867,820	\$22,080,460
*Total, 24 Districts	\$6,984,766	\$3,047,875	\$9,933,425	\$25,139	\$3,043,664	\$23,479,411

Sources: BLS, IMPLAN, RESI

As shown in Figure 14, total state and local tax revenues spurred by business growth and visitor spending at events and festivals in 22 A&E districts grew by \$22.1 million in FY 2016 as compared to FY 2014. When all 24 of Maryland's A&E districts are considered in FY 2016, this growth approaches \$23.5 million. The largest amount of reported growth occurred in Gateway, which saw its tax impacts rise by nearly \$6.8 million, due in large part to increased property and sales tax revenues. Gateway also experienced the largest increase in economic impacts, supported by a significant increase in reported event attendance in FY 2016.

For more detail at the state level, total tax impacts are also presented, broken out by event type: new businesses and visitor spending at events and festivals. This information is presented in Figure 15. For information at the district level, please see Appendix A.

Figure 15: Change in Statewide Tax Impact by Type of Activity of Maryland’s A&E Districts, FY 2014-FY 2016

	Change in Impact (2017 Dollars)					Total
	Property	Income	Sales	Payroll	Other	
New Businesses	-\$1,002,734	-\$899,957	-\$536,227	-\$145,500	-\$377,568	-\$2,517,443
Event Attendance	\$7,987,500	\$3,947,832	\$10,469,652	\$170,639	\$3,421,231	\$25,996,854
Total	\$6,984,766	\$3,047,875	\$9,933,425	\$25,139	\$3,043,664	\$23,479,411

Sources: BLS, IMPLAN, RESI

As shown in Figure 15, increased sales tax revenues contributed primarily to the rise in total tax impacts generated by Maryland’s A&E districts in FY 2016.

5.0 Conclusion

The existence of cultural districts has a positive impact on the local economy. In the case of Maryland’s A&E districts, operations supported an estimated total of 8,594 jobs during FY 2016. Approximately 800 of these jobs were generated by new businesses; the remaining 7,795 jobs were supported by visitor spending at events and festivals. In addition, over \$855.8 million in total state GDP was supported by the A&E districts during the period—\$94.5 million by new businesses and \$761.4 million by visitor spending. Moreover, total wages of nearly \$267.0 million were supported by the A&E districts during FY 2016. Approximately \$26.7 million in wages were generated by new businesses and \$240.3 million were supported by visitor spending at events and festivals. Compared to FY 2014, Maryland’s A&E districts in FY 2016 supported an additional 2,617 jobs, \$261.6 million in state GDP, \$60.5 million in wages, and \$23.5 million in state and local tax revenues.

New businesses formed within the A&E districts’ boundaries during the study period generated nearly \$5.7 million in state and local tax revenues.³⁷ Visitor spending at events and festivals within the A&E districts supported nearly \$57.9 million in state and local tax revenues. The total tax revenue impact of the A&E districts came to approximately \$63.5 million during the study period. Statewide, the tax impact of A&E districts increased by \$23.5 million in FY 2016 as compared to FY 2014.

³⁷ Total tax revenues refer to property, income, sales, payroll, and other tax revenues supported on the state and local level.

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Appendix A—Additional Data for Impact Analyses

Appendix A presents additional data that informed the impact analyses analysis in Section 4.0.

Figures 16 through 18 detail the breakdown of economic impacts generated by each of Maryland’s 24 A&E districts. In each figure, the impact of visitor spending at events and festivals is larger than the impact of new businesses, and direct impacts are greater than indirect or induced impacts.

Figure 19 provides detailed information on total tax impacts for each district by activity type. Impacts are presented in 2017 dollars.

Figure 16: Total Employment Impacts by District, FY 2016

District	Direct	Indirect	Induced	Total
New Businesses				
Annapolis	20	5	4	28
Bel Air	-6	-7	-7	-20
Berlin	-1	0	1	0
Bethesda	81	35	30	146
Bromo Tower	22	-3	-1	18
Cambridge	-36	-5	-7	-48
Chestertown	11	2	2	16
Cumberland	18	8	6	32
Denton	10	2	3	14
Elkton	1	1	1	3
Frederick	56	6	10	72
Frostburg	1	0	0	2
Gateway	28	5	6	39
Grantsville	1	0	0	1
Hagerstown	34	10	12	55
Havre de Grace	38	11	11	60
Highlandtown	4	-1	-1	2
Leonardtown	12	5	5	22
Salisbury	19	4	6	28
Silver Spring	109	14	21	144
Snow Hill	-1	-1	-1	-3
Station North	37	6	8	51
Stevensville	36	4	7	48
Wheaton	72	6	13	90
Subtotal	564	107	128	800
Event/Festival Spending				
Annapolis	498	83	106	688
Bel Air	520	79	110	709
Berlin	80	13	17	109
Bethesda	225	34	48	308
Bromo Tower	10	2	2	14
Cambridge	223	34	48	306
Chestertown	93	15	19	128
Cumberland	155	25	33	213
Denton	30	5	6	41
Elkton	92	14	20	127
Frederick	1,071	173	234	1,478
Frostburg	32	5	7	45
Gateway	630	91	132	852
Grantsville	39	6	9	54
Hagerstown	305	49	66	421
Havre de Grace	239	38	50	327
Highlandtown	24	4	5	33
Leonardtown	112	18	24	154
Salisbury	73	12	15	100
Silver Spring	904	138	190	1,231
Snow Hill	13	2	3	18
Station North	271	43	56	370
Stevensville	2	0	0	3
Wheaton	49	8	10	68
Subtotal	5,692	889	1,213	7,795
Total	6,256	997	1,341	8,594

Sources: IMPLAN, RESI

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Figure 17: Total State GDP Impacts by District, FY 2016

District	Direct	Indirect	Induced	Total
New Businesses				
Annapolis	\$2,456,105	\$687,825	\$548,336	\$3,692,266
Bel Air	-\$2,133,426	-\$1,022,777	-\$1,028,332	-\$4,184,536
Berlin	\$42,977	\$65,688	\$75,692	\$184,356
Bethesda	\$13,291,856	\$5,932,358	\$4,410,785	\$23,634,999
Bromo Tower	\$1,581,794	\$6,462	-\$120,903	\$1,467,353
Cambridge	-\$2,511,083	-\$964,284	-\$988,798	-\$4,464,165
Chestertown	\$760,123	\$364,214	\$365,528	\$1,489,865
Cumberland	\$2,590,307	\$1,348,480	\$931,893	\$4,870,680
Denton	\$930,737	\$263,393	\$431,465	\$1,625,596
Elkton	\$561,852	\$222,274	\$172,381	\$956,508
Frederick	\$3,815,367	\$1,244,223	\$1,406,231	\$6,465,821
Frostburg	\$104,918	\$48,359	\$49,288	\$202,566
Gateway	\$2,235,706	\$857,714	\$858,390	\$3,951,810
Grantsville	\$58,244	\$21,208	\$26,195	\$105,647
Hagerstown	\$5,239,457	\$1,621,179	\$1,688,188	\$8,548,824
Havre de Grace	\$6,564,527	\$1,727,175	\$1,671,194	\$9,962,897
Highlandtown	-\$437,893	-\$96,703	-\$185,509	-\$720,105
Leonardtown	\$2,018,116	\$811,616	\$687,394	\$3,517,126
Salisbury	\$1,961,020	\$655,419	\$848,091	\$3,464,530
Silver Spring	\$7,730,522	\$2,422,924	\$3,093,690	\$13,247,137
Snow Hill	-\$375,427	-\$142,967	-\$208,003	-\$726,397
Station North	\$2,794,906	\$877,858	\$1,122,825	\$4,795,589
Stevensville	\$2,605,195	\$802,805	\$1,089,382	\$4,497,381
Wheaton	\$4,862,755	\$1,179,083	\$1,835,357	\$7,877,195
Subtotal	\$56,748,656	\$18,933,527	\$18,780,759	\$94,462,942
Event/Festival Spending				
Annapolis	\$37,024,867	\$13,127,705	\$15,562,689	\$65,715,261
Bel Air	\$40,386,554	\$13,201,072	\$16,128,693	\$69,716,319
Berlin	\$6,108,390	\$2,071,728	\$2,495,649	\$10,675,768
Bethesda	\$17,049,611	\$5,711,630	\$7,045,335	\$29,806,576
Bromo Tower	\$785,343	\$259,679	\$313,810	\$1,358,832
Cambridge	\$17,482,118	\$5,746,345	\$7,000,466	\$30,228,929
Chestertown	\$6,902,436	\$2,422,012	\$2,827,990	\$12,152,439
Cumberland	\$11,686,915	\$4,037,319	\$4,821,188	\$20,545,422
Denton	\$2,239,961	\$779,801	\$914,440	\$3,934,202
Elkton	\$7,336,571	\$2,413,421	\$2,972,420	\$12,722,411
Frederick	\$83,801,259	\$28,332,048	\$34,248,818	\$146,382,125
Frostburg	\$2,532,746	\$853,782	\$1,030,191	\$4,416,720
Gateway	\$50,082,630	\$15,465,804	\$19,236,345	\$84,784,780
Grantsville	\$3,069,601	\$1,033,801	\$1,265,508	\$5,368,910
Hagerstown	\$23,320,606	\$8,011,270	\$9,684,342	\$41,016,218
Havre de Grace	\$18,201,408	\$6,191,541	\$7,366,194	\$31,759,142
Highlandtown	\$1,874,097	\$628,789	\$761,274	\$3,264,159
Leonardtown	\$8,656,344	\$2,934,452	\$3,532,811	\$15,123,607
Salisbury	\$5,526,198	\$1,897,160	\$2,265,640	\$9,688,997
Silver Spring	\$68,444,981	\$22,797,106	\$27,706,161	\$118,948,247
Snow Hill	\$989,785	\$327,806	\$404,790	\$1,722,381
Station North	\$20,094,306	\$6,963,179	\$8,155,862	\$35,213,347
Stevensville	\$171,023	\$57,868	\$69,745	\$298,636
Wheaton	\$3,740,464	\$1,258,387	\$1,519,919	\$6,518,770
Subtotal	\$437,508,214	\$146,523,705	\$177,330,278	\$761,362,197
Total	\$494,256,871	\$165,457,231	\$196,111,037	\$855,825,139

Sources: IMPLAN, RESI

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Figure 18: Total Wage Impacts by District, FY 2016

District	Direct	Indirect	Induced	Total
New Businesses				
Annapolis	\$330,832	\$183,334	\$159,242	\$673,408
Bel Air	-\$871,426	-\$365,864	-\$298,751	-\$1,536,041
Berlin	\$70,855	\$18,648	\$21,989	\$111,492
Bethesda	\$2,903,599	\$1,863,839	\$1,281,195	\$6,048,633
Bromo Tower	\$156,570	\$23,103	-\$34,989	\$144,684
Cambridge	-\$855,007	-\$272,150	-\$287,239	-\$1,414,396
Chestertown	\$334,263	\$91,180	\$106,187	\$531,630
Cumberland	\$607,298	\$427,417	\$270,697	\$1,305,412
Denton	\$930,737	\$263,393	\$431,465	\$1,625,596
Elkton	\$216,325	\$61,426	\$50,109	\$327,861
Frederick	\$1,298,091	\$316,743	\$408,506	\$2,023,339
Frostburg	\$42,592	\$12,684	\$14,318	\$69,594
Gateway	\$542,310	\$230,916	\$249,271	\$1,022,497
Grantsville	\$22,259	\$5,561	\$7,609	\$35,429
Hagerstown	\$1,294,402	\$443,107	\$490,330	\$2,227,839
Havre de Grace	\$1,225,029	\$475,168	\$485,386	\$2,185,582
Highlandtown	-\$129,942	-\$34,647	-\$53,870	-\$218,459
Leonardtown	\$519,483	\$230,039	\$199,669	\$949,190
Salisbury	\$760,229	\$177,269	\$246,352	\$1,183,850
Silver Spring	\$2,708,813	\$652,313	\$898,627	\$4,259,754
Snow Hill	-\$259,593	-\$34,521	-\$60,447	-\$354,562
Station North	\$814,287	\$229,987	\$326,075	\$1,370,348
Stevensville	\$837,348	\$215,920	\$316,380	\$1,369,648
Wheaton	\$2,012,747	\$246,654	\$533,228	\$2,792,630
Subtotal	\$15,512,100	\$5,461,518	\$5,761,339	\$26,734,957
Event/Festival Spending				
Annapolis	\$12,294,030	\$3,621,563	\$4,520,097	\$20,435,691
Bel Air	\$13,405,400	\$3,660,766	\$4,684,728	\$21,750,894
Berlin	\$2,031,531	\$574,208	\$724,870	\$3,330,609
Bethesda	\$5,739,288	\$1,576,750	\$2,046,325	\$9,362,362
Bromo Tower	\$261,683	\$71,788	\$91,150	\$424,621
Cambridge	\$5,802,805	\$1,596,665	\$2,033,347	\$9,432,817
Chestertown	\$2,310,411	\$667,741	\$821,410	\$3,799,561
Cumberland	\$3,896,010	\$1,116,328	\$1,400,322	\$6,412,660
Denton	\$2,239,961	\$779,801	\$914,440	\$3,934,202
Elkton	\$2,434,204	\$672,706	\$863,351	\$3,970,260
Frederick	\$27,848,407	\$7,875,115	\$9,947,671	\$45,671,193
Frostburg	\$840,742	\$237,428	\$299,224	\$1,377,394
Gateway	\$16,432,682	\$4,297,623	\$5,587,531	\$26,317,835
Grantsville	\$1,022,070	\$287,652	\$367,566	\$1,677,288
Hagerstown	\$7,767,875	\$2,219,966	\$2,812,799	\$12,800,640
Havre de Grace	\$6,071,909	\$1,713,485	\$2,139,575	\$9,924,969
Highlandtown	\$621,827	\$175,139	\$221,115	\$1,018,081
Leonardtown	\$2,883,770	\$814,620	\$1,026,121	\$4,724,511
Salisbury	\$1,844,177	\$525,281	\$658,064	\$3,027,522
Silver Spring	\$22,820,798	\$6,300,758	\$8,047,429	\$37,168,986
Snow Hill	\$331,799	\$90,642	\$117,573	\$540,014
Station North	\$6,734,861	\$1,920,252	\$2,368,956	\$11,024,069
Stevensville	\$57,393	\$15,974	\$20,246	\$93,613
Wheaton	\$1,241,910	\$347,583	\$441,467	\$2,030,960
Subtotal	\$146,935,544	\$41,159,832	\$52,155,376	\$240,250,752
Total	\$162,447,644	\$46,621,350	\$57,916,714	\$266,985,708

Sources: IMPLAN, RESI

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Figure 19: Total Tax Impacts by District, FY 2016

District	Property	Income	Sales	Payroll	Other	Total
New Businesses						
Annapolis	\$76,265	\$29,574	\$79,408	\$1,167	\$34,560	\$220,974
Bel Air	-\$52,068	-\$54,231	-\$53,812	-\$2,662	-\$27,209	-\$189,982
Berlin	\$5,078	\$3,999	\$5,263	\$193	\$2,108	\$16,641
Bethesda	\$362,623	\$235,045	\$376,454	\$10,482	\$177,983	\$1,162,587
Bromo Tower	\$6,732	-\$7,842	\$7,132	\$251	\$6,960	\$13,233
Cambridge	-\$178,002	-\$52,428	-\$185,533	-\$2,451	-\$56,263	-\$474,677
Chestertown	\$32,219	\$19,342	\$33,466	\$921	\$12,449	\$98,397
Cumberland	\$58,944	\$49,535	\$61,059	\$2,262	\$32,198	\$203,998
Denton	\$36,455	\$23,026	\$37,852	\$1,012	\$15,010	\$113,355
Elkton	\$21,038	\$8,774	\$21,898	\$568	\$8,172	\$60,450
Frederick	\$190,673	\$74,508	\$198,524	\$3,506	\$66,384	\$533,595
Frostburg	\$7,682	\$2,617	\$8,004	\$121	\$2,521	\$20,945
Gateway	\$115,968	\$46,439	\$120,729	\$1,772	\$40,938	\$325,846
Grantsville	\$3,467	\$1,398	\$3,609	\$61	\$1,175	\$9,710
Hagerstown	\$151,277	\$90,354	\$157,138	\$3,861	\$71,159	\$473,789
Havre de Grace	\$146,797	\$89,534	\$152,463	\$3,788	\$83,054	\$475,636
Highlandtown	-\$34,498	-\$10,047	-\$35,959	-\$378	-\$11,375	-\$92,257
Leonardtown	\$49,175	\$36,601	\$50,995	\$1,645	\$26,287	\$164,703
Salisbury	\$92,833	\$45,100	\$96,551	\$2,051	\$33,748	\$270,283
Silver Spring	\$356,165	\$164,781	\$370,529	\$7,382	\$130,070	\$1,028,927
Snow Hill	-\$32,569	-\$10,772	-\$33,933	-\$614	-\$10,083	-\$87,971
Station North	\$121,153	\$60,597	\$125,985	\$2,375	\$44,785	\$354,895
Stevensville	\$114,303	\$58,612	\$118,845	\$2,374	\$42,522	\$336,656
Wheaton	\$214,549	\$96,561	\$223,233	\$4,839	\$73,796	\$612,978
Subtotal	\$1,866,259	\$1,001,077	\$1,939,900	\$44,526	\$800,949	\$5,652,711
Event/Festival Spending						
Annapolis	\$1,572,679	\$833,396	\$1,634,855	\$35,414	\$587,831	\$4,664,175
Bel Air	\$1,879,382	\$861,128	\$1,955,271	\$37,693	\$676,377	\$5,409,851
Berlin	\$276,554	\$133,403	\$287,643	\$5,772	\$100,763	\$804,135
Bethesda	\$798,386	\$376,784	\$830,495	\$16,224	\$287,283	\$2,309,172
Bromo Tower	\$35,661	\$16,748	\$37,096	\$736	\$12,933	\$103,174
Cambridge	\$815,614	\$373,798	\$848,546	\$16,347	\$293,512	\$2,347,817
Chestertown	\$298,420	\$151,054	\$310,302	\$6,584	\$110,598	\$876,958
Cumberland	\$518,529	\$257,810	\$539,228	\$11,113	\$190,456	\$1,517,136
Denton	\$98,071	\$48,828	\$101,985	\$2,135	\$36,159	\$287,178
Elkton	\$348,191	\$158,873	\$362,259	\$6,880	\$124,746	\$1,000,949
Frederick	\$3,871,124	\$1,830,907	\$4,026,764	\$79,145	\$1,401,958	\$11,209,898
Frostburg	\$117,036	\$55,057	\$121,745	\$2,387	\$42,369	\$338,594
Gateway	\$2,380,509	\$1,025,355	\$2,477,403	\$45,607	\$847,130	\$6,776,004
Grantsville	\$142,956	\$67,699	\$148,703	\$2,906	\$51,622	\$413,886
Hagerstown	\$1,047,371	\$518,227	\$1,089,212	\$22,183	\$383,139	\$3,060,132
Havre de Grace	\$820,599	\$393,329	\$853,530	\$17,199	\$299,282	\$2,383,939
Highlandtown	\$87,566	\$40,684	\$91,095	\$1,764	\$31,584	\$252,693
Leonardtown	\$396,810	\$188,800	\$412,750	\$8,188	\$144,012	\$1,150,560
Salisbury	\$248,096	\$121,091	\$258,027	\$5,247	\$90,713	\$723,174
Silver Spring	\$3,103,341	\$1,480,141	\$3,227,966	\$64,412	\$1,127,182	\$9,003,042
Snow Hill	\$45,496	\$21,639	\$47,324	\$936	\$16,437	\$131,832
Station North	\$881,338	\$435,337	\$916,555	\$19,104	\$324,586	\$2,576,920
Stevensville	\$7,823	\$3,747	\$8,137	\$163	\$2,844	\$22,714
Wheaton	\$167,257	\$81,235	\$173,957	\$3,519	\$61,115	\$487,083
Subtotal	\$19,958,809	\$9,475,070	\$20,760,848	\$411,658	\$7,244,631	\$57,851,016
Total	\$21,825,068	\$10,476,147	\$22,700,748	\$456,184	\$8,045,580	\$63,503,727

Sources: IMPLAN, RESI

Figures 20 through 22 contain a breakdown of the change in economic impact by type of activity for each of Maryland's 24 A&E districts; Figure 23 presents a breakdown of the change in tax impacts by district for each of Maryland's 24 A&E districts. All impacts are presented in jobs or 2017 dollars. Please note that since Chestertown and Grantsville did not receive A&E district designation until FY 2016 (as indicated by an asterisk), their impacts are only included in the 24-district total. Please also note that impacts were calculated based on the most recently available data and model at the time of analysis. However, both studies used the same model area—the state of Maryland.

As will be seen in Figure 20, a decline in employment from business growth was more than offset by an increase in employment from visitor spending at events and festivals. On the whole, direct employment grew by 1,867 jobs, indirect employment grew by 328 jobs, and induced employment grew by 422 jobs. In total, Maryland's A&E districts supported 2,617 more jobs in FY 2016 than in FY 2014.

Figure 21 presents the change in state GDP generated by both new businesses and visitor spending at events and festivals from FY 2014 to FY 2016. As was the case with employment, the impact on state GDP of increased visitor spending at events and festivals was more than adequate to counteract the decline in state GDP stemming from new businesses. In total, state GDP generated by Maryland's A&E districts in FY 2016 was \$261.6 million higher than in FY 2014.

Figure 22 contains detailed information on the change in wage impacts of Maryland's 24 A&E districts from FY 2014-FY 2016. Despite a lower wage impact for new businesses in FY 2016 as compared to FY 2014, increased wage impacts stemming from visitor spending at events and festivals made the total changes positive. In total across all 24 A&E districts, direct wages grew by \$33.1 million, indirect wages increased by \$12.0 million, induced wages grew by \$15.5 million, totaling \$60.5 million in wage impact.

As will be shown in Figure 23, Maryland's 24 A&E districts supported \$23.5 million more in state and local tax revenues in FY 2016 as compared to FY 2014. Decreased amounts of state and local tax revenues from new businesses were more than offset by increased amounts of state and local tax revenues generated from visitor spending at events and festivals. Sales tax revenues formed the plurality of the impact.

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Figure 20: Change in Employment in 24 A&E Districts by Type of Activity, FY 2014-FY 2016

District	Direct	Indirect	Induced	Total
New Businesses				
Annapolis	7	2	-1	7
Bel Air	-48	-18	-20	-86
Berlin	-34	-5	-6	-46
Bethesda	-133	4	-19	-149
Bromo Tower	24	-3	-3	18
Cambridge	-60	-9	-14	-84
Chestertown*	11	2	2	16
Cumberland	-20	-6	-10	-35
Denton	10	2	3	14
Elkton	-8	0	0	-8
Frederick	-8	-2	-3	-13
Frostburg	1	-2	-1	-1
Gateway	12	3	2	18
Grantsville*	1	0	0	1
Hagerstown	6	6	6	19
Havre de Grace	36	11	11	58
Highlandtown	-27	-4	-8	-40
Leonardtwn	-12	0	-2	-15
Salisbury	-41	-10	-12	-63
Silver Spring	-55	-17	-35	-108
Snow Hill	0	-1	-2	-3
Station North	32	6	7	45
Stevensville	33	4	7	45
Wheaton	6	-4	-4	-2
Subtotal, 22 Districts	-280	-44	-105	-429
*Subtotal, 24 Districts	-268	-42	-102	-412
Event Spending				
Annapolis	467	78	100	646
Bel Air	179	30	44	253
Berlin	-34	-4	-5	-44
Bethesda	-30	0	-1	-30
Bromo Tower	0	0	0	0
Cambridge	176	28	39	243
Chestertown*	93	15	19	128
Cumberland	-65	-9	-10	-83
Denton	1	1	1	3
Elkton	36	6	9	51
Frederick	439	79	113	632
Frostburg	2	1	1	4
Gateway	607	87	127	821
Grantsville*	39	6	9	54
Hagerstown	108	22	29	159
Havre de Grace	128	21	29	178
Highlandtown	-16	-2	-3	-21
Leonardtwn	-8	-1	0	-8
Salisbury	-49	-6	-9	-63
Silver Spring	53	12	23	88
Snow Hill	-1	0	0	-1
Station North	21	6	9	35
Stevensville	0	0	0	0
Wheaton	-13	-1	-1	-15
Subtotal, 22 Districts	2,002	349	496	2,847
*Subtotal, 24 Districts	2,135	370	524	3,029
Total, 22 Districts	1,722	304	392	2,418
*Total, 24 Districts	1,867	328	422	2,617

Sources: IMPLAN, RESI

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Figure 21: Change in State GDP in 24 A&E Districts by Type of Activity, FY 2014-FY 2016 (2017 Dollars)

District	Direct	Indirect	Induced	Total
New Businesses				
Annapolis	\$1,118,935	\$314,582	-\$141,090	\$1,292,427
Bel Air	-\$7,533,827	-\$2,901,908	-\$2,901,806	-\$13,337,541
Berlin	-\$2,843,436	-\$866,912	-\$875,704	-\$4,586,053
Bethesda	-\$6,853,053	\$792,789	-\$2,583,450	-\$8,643,714
Bromo Tower	\$824,202	-\$65,828	-\$431,839	\$326,536
Cambridge	-\$5,045,451	-\$1,587,242	-\$2,069,266	-\$8,701,959
Chestertown*	\$760,123	\$364,214	\$365,528	\$1,489,865
Cumberland	-\$3,578,422	-\$1,020,377	-\$1,373,453	-\$5,972,252
Denton	\$930,737	\$263,393	\$431,465	\$1,625,596
Elkton	-\$71,698	\$44,185	-\$42,386	-\$69,900
Frederick	-\$930,256	-\$175,944	-\$407,316	-\$1,513,517
Frostburg	-\$314,361	-\$259,994	-\$94,594	-\$668,949
Gateway	\$772,055	\$548,270	\$340,277	\$1,660,602
Grantsville*	\$58,244	\$21,208	\$26,195	\$105,647
Hagerstown	\$3,176,127	\$1,067,880	\$910,956	\$5,154,963
Havre de Grace	\$6,530,844	\$1,732,993	\$1,629,060	\$9,892,897
Highlandtown	-\$2,977,916	-\$709,504	-\$1,190,340	-\$4,877,760
Leonardtown	-\$236,713	\$84,437	-\$276,194	-\$428,470
Salisbury	-\$5,101,400	-\$1,478,852	-\$1,743,060	-\$8,323,312
Silver Spring	-\$11,407,155	-\$2,502,156	-\$4,959,901	-\$18,869,212
Snow Hill	-\$401,990	-\$166,250	-\$229,458	-\$797,699
Station North	\$2,622,495	\$841,919	\$1,037,380	\$4,501,794
Stevensville	\$2,474,659	\$776,775	\$1,038,566	\$4,290,000
Wheaton	-\$574,767	-\$421,840	-\$483,096	-\$1,479,703
Subtotal, 22 Districts	-\$29,420,391	-\$5,689,585	-\$14,415,251	-\$49,525,226
*Subtotal, 24 Districts	-\$28,602,024	-\$5,304,163	-\$14,023,528	-\$47,929,714
Event Spending				
Annapolis	\$34,541,504	\$12,396,819	\$14,706,745	\$61,645,067
Bel Air	\$13,308,530	\$5,325,276	\$6,640,183	\$25,273,989
Berlin	-\$2,951,519	-\$602,202	-\$718,802	-\$4,272,523
Bethesda	-\$2,035,561	\$191,498	\$88,749	-\$1,755,313
Bromo Tower	-\$35,203	\$20,069	\$8,011	-\$7,123
Cambridge	\$13,907,833	\$4,716,833	\$5,713,144	\$24,337,810
Chestertown*	\$6,902,436	\$2,422,012	\$2,827,990	\$12,152,439
Cumberland	-\$5,054,113	-\$1,039,354	-\$1,320,177	-\$7,413,645
Denton	\$125,480	\$133,499	\$139,884	\$398,863
Elkton	\$2,845,307	\$1,093,128	\$1,394,456	\$5,332,890
Frederick	\$36,762,533	\$14,043,811	\$17,014,191	\$67,820,535
Frostburg	\$144,936	\$138,483	\$180,264	\$463,683
Gateway	\$48,375,197	\$14,945,632	\$18,606,031	\$81,926,860
Grantsville*	\$3,069,601	\$1,033,801	\$1,265,508	\$5,368,910
Hagerstown	\$8,517,738	\$3,649,942	\$4,385,037	\$16,552,717
Havre de Grace	\$9,576,115	\$3,604,123	\$4,287,601	\$17,467,838
Highlandtown	-\$1,376,306	-\$322,683	-\$358,757	-\$2,057,747
Leonardtown	-\$688,397	\$118,975	\$154,573	-\$414,849
Salisbury	-\$3,752,893	-\$841,780	-\$1,170,401	-\$5,765,075
Silver Spring	\$1,981,341	\$3,008,570	\$4,050,001	\$9,039,912
Snow Hill	-\$85,101	\$6,006	\$18,884	-\$60,211
Station North	\$1,826,828	\$1,360,043	\$1,427,386	\$4,614,257
Stevensville	-\$3,135	\$6,351	\$7,173	\$10,389
Wheaton	-\$900,776	-\$90,696	-\$125,084	-\$1,116,556
Subtotal, 22 Districts	\$155,030,338	\$61,862,342	\$75,129,092	\$292,021,772
*Subtotal, 24 Districts	\$165,002,375	\$65,318,154	\$79,222,590	\$309,543,120
Total, 22 Districts	\$125,609,947	\$56,172,757	\$60,713,841	\$242,496,545
*Total, 24 Districts	\$136,400,351	\$60,013,992	\$65,199,062	\$261,613,406

Sources: BLS, IMPLAN, RESI

Figure 22: Change in Wages in 24 A&E Districts by Type of Activity, FY 2014-FY 2016 (2017 Dollars)

District	Direct	Indirect	Induced	Total
New Businesses				
Annapolis	-\$416,044	\$36,448	-\$64,339	-\$443,935
Bel Air	-\$2,601,957	-\$1,012,899	-\$906,355	-\$4,521,212
Berlin	-\$860,910	-\$282,944	-\$286,548	-\$1,430,402
Bethesda	-\$3,900,170	\$182,249	-\$987,533	-\$4,705,454
Bromo Tower	-\$124,311	-\$4,668	-\$135,907	-\$264,885
Cambridge	-\$1,997,169	-\$489,272	-\$637,671	-\$3,124,112
*Chestertown	\$334,263	\$91,180	\$106,187	\$531,630
Cumberland	-\$1,693,522	-\$389,201	-\$476,815	-\$2,559,538
Denton	\$930,737	\$263,393	\$431,465	\$1,625,596
Elkton	-\$8,623	\$8,685	-\$19,541	-\$19,479
Frederick	-\$623,689	-\$131,324	-\$179,613	-\$934,626
Frostburg	\$1,511	-\$97,485	-\$32,371	-\$128,344
Gateway	-\$14,977	\$127,198	\$81,238	\$193,459
*Grantsville	\$22,259	\$5,561	\$7,609	\$35,429
Hagerstown	\$453,704	\$270,395	\$238,278	\$962,377
Havre de Grace	\$1,169,134	\$466,607	\$471,730	\$2,107,471
Highlandtown	-\$1,229,376	-\$230,686	-\$379,743	-\$1,839,806
Leonardtown	-\$390,792	-\$13,937	-\$112,904	-\$517,633
Salisbury	-\$1,831,085	-\$561,861	-\$593,977	-\$2,986,924
Silver Spring	-\$5,931,559	-\$1,052,888	-\$1,713,233	-\$8,697,680
Snow Hill	-\$264,298	-\$45,758	-\$67,415	-\$377,471
Station North	\$721,684	\$216,216	\$298,362	\$1,236,261
Stevensville	\$789,422	\$207,352	\$299,892	\$1,296,666
Wheaton	-\$318,248	-\$294,622	-\$218,760	-\$831,630
Subtotal, 22 Districts	-\$18,140,538	-\$2,829,002	-\$4,991,760	-\$25,961,301
*Subtotal, 24 Districts	-\$17,784,017	-\$2,732,261	-\$4,877,965	-\$25,394,243
Event/Festival Spending				
Annapolis	\$11,442,813	\$3,386,051	\$4,242,496	\$19,071,360
Bel Air	\$4,004,412	\$1,113,766	\$1,607,305	\$6,725,484
Berlin	-\$1,114,072	-\$299,481	-\$317,701	-\$1,731,255
Bethesda	-\$1,091,397	-\$201,568	-\$210,042	-\$1,503,007
Bromo Tower	-\$30,586	-\$7,189	-\$8,042	-\$45,818
Cambridge	\$4,535,200	\$1,265,895	\$1,615,809	\$7,416,904
*Chestertown	\$2,310,411	\$667,741	\$821,410	\$3,799,561
Cumberland	-\$1,968,177	-\$550,656	-\$591,685	-\$3,110,518
Denton	\$1,478,218	\$569,063	\$663,225	\$2,710,506
Elkton	\$871,558	\$242,411	\$351,573	\$1,465,542
Frederick	\$11,005,509	\$3,205,763	\$4,357,789	\$18,569,061
Frostburg	\$3,892	\$3,466	\$23,566	\$30,924
Gateway	\$15,822,433	\$4,127,043	\$5,383,089	\$25,332,565
*Grantsville	\$1,022,070	\$287,652	\$367,566	\$1,677,288
Hagerstown	\$2,546,541	\$820,489	\$1,094,024	\$4,461,054
Havre de Grace	\$3,026,757	\$869,158	\$1,141,103	\$5,037,017
Highlandtown	-\$499,708	-\$134,411	-\$142,128	-\$776,247
Leonardtown	-\$389,656	-\$110,570	-\$69,593	-\$569,819
Salisbury	-\$1,477,301	-\$375,136	-\$456,439	-\$2,308,877
Silver Spring	-\$329,256	-\$136,484	\$374,830	-\$90,910
Snow Hill	-\$47,107	-\$14,654	-\$7,590	-\$69,350
Station North	\$143,833	\$93,070	\$186,658	\$423,561
Stevensville	-\$3,944	-\$918	-\$49	-\$4,911
Wheaton	-\$403,448	-\$80,510	-\$92,058	-\$576,015
Subtotal, 22 Districts	\$47,526,514	\$13,784,598	\$19,146,140	\$80,457,251
*Subtotal, 24 Districts	\$50,858,996	\$14,739,991	\$20,335,114	\$85,934,101
Total, 22 Districts	\$29,385,976	\$10,955,596	\$14,154,380	\$54,495,950
*Total, 24 Districts	\$33,074,979	\$12,007,730	\$15,457,149	\$60,539,858

Sources: BLS, IMPLAN, RESI

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Figure 23: Change in Total Tax Impact in 24 A&E Districts by Type of Activity, FY 2014-FY 2016 (2017 Dollars)

District	Property	Income	Sales	Payroll	Other	Total
New Businesses						
Annapolis	\$51,360	-\$9,161	\$58,305	-\$578	\$20,187	\$120,114
Bel Air	-\$227,442	-\$159,529	-\$204,300	-\$7,324	-\$97,065	-\$695,660
Berlin	-\$109,968	-\$49,442	-\$93,633	-\$2,216	-\$35,525	-\$290,784
Bethesda	-\$359,371	-\$160,007	-\$243,518	-\$6,314	-\$92,733	-\$861,944
Bromo Tower	\$68,515	-\$25,658	\$60,766	-\$389	\$10,956	\$114,190
Cambridge	-\$252,920	-\$113,289	-\$249,641	-\$5,122	-\$87,101	-\$708,073
*Chestertown	\$32,219	\$19,342	\$33,466	\$921	\$12,449	\$98,397
Cumberland	\$112,187	-\$79,476	\$108,559	-\$3,774	-\$2,020	\$135,476
Denton	\$36,455	\$23,026	\$37,852	\$1,012	\$15,010	\$113,355
Elkton	-\$7,455	-\$3,298	-\$2,609	\$25	-\$513	-\$13,850
Frederick	-\$64,298	-\$27,332	-\$20,841	-\$1,115	-\$7,735	-\$121,320
Frostburg	\$2,383	-\$5,544	\$3,512	-\$188	-\$1,701	-\$1,538
Gateway	\$79,688	\$17,293	\$89,680	\$477	\$24,652	\$211,789
*Grantsville	\$3,467	\$1,398	\$3,609	\$61	\$1,175	\$9,710
Hagerstown	\$73,935	\$46,702	\$90,740	\$1,884	\$44,352	\$257,614
Havre de Grace	\$138,979	\$87,204	\$145,728	\$3,665	\$81,036	\$456,613
Highlandtown	-\$145,633	-\$121,182	-\$147,094	-\$111,513	-\$122,510	-\$203,392
Leonardtwn	-\$37,621	-\$17,878	-\$23,458	-\$646	-\$4,407	-\$84,010
Salisbury	-\$113,917	-\$100,465	-\$80,618	-\$4,464	-\$51,808	-\$351,271
Silver Spring	-\$391,728	-\$287,977	-\$271,192	-\$12,856	-\$140,838	-\$1,104,590
Snow Hill	-\$34,722	-\$12,018	-\$35,780	-\$650	-\$11,141	-\$94,311
Station North	\$106,344	\$55,779	\$113,233	\$2,166	\$40,776	\$318,297
Stevensville	\$108,174	\$55,722	\$113,576	\$2,260	\$40,474	\$320,206
Wheaton	-\$71,366	-\$34,166	-\$22,570	-\$822	-\$13,538	-\$142,461
Subtotal, 22 Districts	-\$1,038,420	-\$920,697	-\$573,302	-\$146,482	-\$391,192	-\$2,625,550
*Subtotal, 24 Districts	-\$1,002,734	-\$899,957	-\$536,227	-\$145,500	-\$377,568	-\$2,517,443
Event/Festival Spending						
Annapolis	\$1,460,940	\$785,235	\$1,538,759	\$33,283	\$552,808	\$4,371,025
Bel Air	\$631,492	\$326,846	\$882,044	\$14,225	\$287,473	\$2,142,081
Berlin	-\$133,964	-\$47,687	-\$65,356	-\$2,134	-\$28,746	-\$277,887
Bethesda	-\$46,969	-\$15,456	\$103,803	-\$746	\$18,951	\$59,583
Bromo Tower	\$104	-\$518	\$6,539	\$2	\$1,422	\$7,549
Cambridge	\$655,955	\$301,230	\$711,283	\$13,198	\$243,114	\$1,924,779
*Chestertown	\$298,420	\$151,054	\$310,302	\$6,584	\$110,598	\$876,958
Cumberland	-\$174,590	-\$88,659	-\$56,318	-\$3,761	-\$38,011	-\$361,339
Denton	\$6,644	\$5,216	\$23,405	\$223	\$6,676	\$42,163
Elkton	\$139,126	\$70,047	\$182,448	\$2,969	\$59,646	\$454,236
Frederick	\$1,841,038	\$860,008	\$2,281,968	\$36,816	\$746,242	\$5,766,072
Frostburg	\$8,969	\$7,209	\$28,821	\$284	\$8,238	\$53,521
Gateway	\$2,308,322	\$989,827	\$2,415,372	\$44,068	\$823,557	\$6,581,145
*Grantsville	\$142,956	\$67,699	\$148,703	\$2,906	\$51,622	\$413,886
Hagerstown	\$402,566	\$219,661	\$534,911	\$9,158	\$177,592	\$1,343,888
Havre de Grace	\$429,422	\$220,054	\$517,169	\$9,564	\$175,915	\$1,352,124
Highlandtown	-\$68,626	-\$22,308	-\$43,278	-\$1,038	-\$16,332	-\$151,582
Leonardtwn	-\$10,860	-\$1,587	\$62,320	-\$81	\$12,820	\$62,613
Salisbury	-\$158,158	-\$72,729	-\$91,141	-\$3,088	-\$40,013	-\$365,128
Silver Spring	\$192,902	\$147,568	\$725,865	\$6,218	\$197,949	\$1,270,503
Snow Hill	-\$2,792	-\$94	\$5,806	-\$17	\$1,127	\$4,031
Station North	\$104,022	\$56,381	\$248,558	\$2,548	\$72,039	\$483,548
Stevensville	-\$92	\$222	\$1,331	\$9	\$344	\$1,814
Wheaton	-\$39,325	-\$11,385	-\$3,664	-\$553	-\$3,801	-\$58,728
Subtotal, 22 Districts	\$7,546,124	\$3,729,079	\$10,010,647	\$161,149	\$3,259,011	\$24,706,010
*Subtotal, 24 Districts	\$7,987,500	\$3,947,832	\$10,469,652	\$170,639	\$3,421,231	\$25,996,854
Total, 22 Districts	\$6,507,704	\$2,808,382	\$9,437,345	\$14,667	\$2,867,820	\$22,080,460
*Total, 24 Districts	\$6,984,766	\$3,047,875	\$9,933,425	\$25,139	\$3,043,664	\$23,479,411

Sources: BLS, IMPLAN, RESI

Appendix B—Methodology

B.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 employment and tax impact of each dollar earned and spent by the following: employees of the district, other supporting vendors (business services, retail, etc.), each dollar spent by these vendors on other firms, and each dollar spent by the households' employees, other vendors' employees, and other businesses' employees.

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

Consider the following example. A new firm opens in a region and directly employs 100 workers. The firm purchases supplies, both from outside the region as well as from local suppliers, which leads to increased business for local firms, thereby hypothetically creating jobs for another 100 workers. This is called the indirect effect. The workers at the firm and at suppliers spend their income mostly in the local area, hypothetically creating jobs for another 50 workers. This is the induced effect. The direct, indirect and induced effects add up to 250 jobs created from the original 100 jobs. Thus, in terms of employment, the total economic impact of the firm in our example is 250.³⁸

B.2 Input Assumptions

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

Economic impacts were determined based on two main factors: (1) estimated new direct employment occurring after A&E district designation as the attraction of new firms could primarily be attributed to the designation, and (2) estimated spending at events and festivals for which attendance was provided. For the most part, this information was provided by the A&E districts or MSAC. However, in some cases, these data were not provided in the annual reports. In instances where the number of employees was not provided in the annual report, RESI estimated this figure utilizing a calculation of the average number of employees per square foot with an estimate of the average floor area by district. To estimate attendance figures when they were not provided in annual reports, RESI utilized average attendance at similar events from all A&E districts that did report this information for FY 2016. "Similar events" are defined

³⁸ Total economic impact is defined as the sum of direct, indirect, and induced effects.

by the following categories: community events, cultural events, film events, fine arts events, food events, holiday events, performing arts events, and other events.

To determine event and festival spending inputs, RESI researched comparable events and the associated visitor spending figures and attendance to estimate percentage spending levels for hotels, transportation, food and beverage, retail, entertainment, and other spending. Where districts did not provide attendance levels for events or festivals, attendance was estimated. In these cases, event or festival attendance was estimated based on average attendance for similar events. A summary of the findings from RESI's literature review can be found in Figure 24.

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Figure 24: Event and Festival Spending Data Summary³⁹

Events/Festivals	Hotels	Transportation	Food and Beverage	Retail	Entertainment	Other	Total Spending	Total Attendance
Community								
Dolores River Festival (2011)	\$935	\$8,121	\$36,957	\$13,995	N/A	N/A	\$60,008	2,225
Family Gras Weekend in Jefferson Parish (2011)	\$892,516	\$91,708	\$2,741,058	\$656,871	\$2,191,123	N/A	\$6,573,276	85,000
Market Street Festival in Ocean Springs (2010)	\$2,182,532	\$1,899,124	\$6,003,997	\$2,388,666	\$2,309,157	N/A	\$14,783,476	34,000
Light City Baltimore (2016)	\$4,356,000	\$2,154,000	\$6,807,000	\$1,830,000	\$1,340,000	\$1,282,000	\$17,769,000	400,000
Average	\$21.50	\$16.49	\$60.62	\$22.21	\$32.35	\$3.21		
Culture								
Bayou Boogaloo Festival (2011)	\$150,413	\$47,070	\$285,080	\$62,808	\$197,934	N/A	\$743,305	27,000
Irish Fair of Minnesota (2011)	\$305,820	\$523,800	\$2,798,660	\$1,193,010	N/A	\$154,380	\$4,975,670	100,000
San Diego Pride (2014)	\$1,860,000	N/A	\$2,120,000	\$847,000	\$847,000	N/A	\$5,674,000	100,000
Twin Cities Pride Festival & Parade (2010)	\$4,488,242	\$1,037,402	\$10,374,925	\$2,297,011	\$1,267,616	\$2,285,680	\$21,750,875	400,000
Average	\$9.61	\$3.19	\$21.42	\$7.12	\$6.32	\$3.63		
Film								
Sundance Film Festival (2015)	\$28,913,179	\$4,993,743	\$15,012,103	\$9,158,994	\$4,416,783	N/A	\$62,494,802	28,913,179
Big Sky Documentary Film Festival (2009)	\$2,167,340	\$216,734	\$11,582,802	\$464,156	\$186,046	\$310,716	\$14,927,794	2,167,340
Durango Film Fest (2009)	\$7,921	\$3,993	\$19,064	\$5,545	N/A	\$1,792	\$38,315	7,921
The Eugene International Film Festival (2007)	\$190,368	\$11,340	\$80,220	\$61,320	\$57,540	\$22,680	\$423,468	190,368
Average	\$219.40	\$35.16	\$395.18	\$65.50	\$38.99	\$12.44		
Fine Art								
Columbus Arts Festival (2010)	\$1,564,500	\$675,500	\$4,564,000	\$2,569,000	N/A	\$612,500	\$9,985,500	350,000
Peter Anderson (2010)	\$3,744,387	\$1,270,196	\$2,735,131	\$9,224,279	N/A	\$5,691,227	\$22,665,220	104,562
Artscape (2012)	\$760,865	\$1,157,121	\$6,699,565	\$6,326,063	\$1,036,983	\$527,371	\$16,507,968	350,000
Fort Worth Arts Festival (2006)	\$665,047	\$901,356	\$139,391	\$2,181,367	\$45,995	\$109,991	\$4,043,147	198,811
Average	\$11.45	\$5.48	\$14.76	\$31.15	\$2.96	\$14.56		
Food								
Oregon Brewers Fest (2014)	\$9,100,000	N/A	\$8,200,000	N/A	N/A	N/A	\$17,300,000	25,668
Economic Impact of Fiesta Oyster Bake (2007)	\$519,181	\$541,622	\$2,245,156	\$163,114	\$8,642	\$171,938	\$3,649,653	52,189
Iowa Food Festivals (2005)	\$589,513.60	\$227,027.28	\$579,702.72	\$270,401.71	N/A	N/A	\$1,666,645	22,806
Lodi Grape Festival & Harvest Fair (2003)	\$1,928,321	\$164,428	N/A	\$1,305,689	\$3,204,549	\$1,328,723	\$7,931,710	173,850
Average	\$100.35	\$7.09	\$129.30	\$7.50	\$9.30	\$5.47		

³⁹ "Average" refers to the average weighted spending per capita for each spending category.

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Events/Festivals	Hotels	Transportation	Food and Beverage	Retail	Entertainment	Other	Total Spending	Total Attendance
Holiday								
Pennsylvania Christmas Craft and Gift Show (2012)	\$104,912	\$107,571	\$197,532	\$205,636	N/A	\$8,837	\$624,488	24,710
Lahaina Halloween Festival (2009)	\$855,258	N/A	\$283,419	\$398,411	N/A	N/A	\$1,537,088	5,264
Light in Winter Festival (2007)	\$26,055	\$12,711	\$18,564	\$38,319	\$6,384	N/A	\$102,033	3,000
Riverfest in Arkansas (2009)	\$30,026,653	\$13,284,169	\$43,249,399	\$17,896,496	\$13,142,710	\$6,784,475	\$124,383,902	186,131
Average	\$84.18	\$26.65	\$75.10	\$48.23	\$36.37	\$18.40		
Performing Arts								
Sisters Folk Festival (2014)	\$211,000	\$118,000	\$351,000	\$121,000	\$414,000	N/A	\$1,215,000	3,676
Bogalusa Blues & Heritage Festival (2013)	\$40,600	\$81,300	\$189,750	\$34,400	N/A	\$169,600	\$515,650	5,000
Country Thunder music festival (2012)	\$1,029,718	\$1,824,674	\$2,289,572	\$571,649	N/A	N/A	\$5,715,613	30,879
Electric Daisy Festival Las Vegas (2011)	\$1,000,232	\$542,726	\$865,634	\$371,754	\$477,949	\$400,075	\$3,658,370	12,000
Average	\$45.55	\$38.17	\$69.93	\$22.32	\$76.23	\$33.63		
Other								
Baltimore Book Festival (2012)	\$211,200	\$201,800	\$572,800	\$220,800	95,900	N/A	\$1,302,500	47,000
Four Corners Motorcycle Rally (2010)	\$509,220	\$485,100	\$996,480	\$559,980	350,460	N/A	\$2,901,240	18,000
Philadelphia International Flower Show (2010)	\$2,929,687	\$1,401,099	\$6,374,807	N/A	N/A	\$8,092,861	\$18,798,454.00	231,924
The Great New England Air Show (2009)	\$1,121,936	\$2,239,297	\$3,481,114	\$1,714,018	\$192,175	\$219,628	\$8,968,168.00	345,000
Average	\$12.17	\$10.94	\$26.28	\$13.59	\$7.36	\$17.77		

Sources: Various⁴⁰

⁴⁰ For a full list of the references used, please refer to Section 6.0.

RESI determined tax impacts based primarily on data from district responses provided in the annual reports. The project team cross-referenced responses to questions regarding property tax credits in the annual reports with information available from the State Department of Assessment and Taxation (SDAT)’s online property database. The properties that reported applying for a property tax credit in the annual reports were not listed as receiving a tax credit in the SDAT database. RESI did not assume that all such applications were approved as this would likely overstate the impacts of property tax credits in the A&E districts, therefore understating the tax impacts.

B.3 Modeling Assumptions

RESI assigned IMPLAN industry sectors based on application materials and/or annual reports provided by MSAC.

- Economic impact multipliers are developed from IMPLAN input/output software.
- IMPLAN data are based on the North American Industrial Classification System (NAICS).
- IMPLAN employment multipliers are adjusted for inflation using the Bureau of Labor Statistics’ CPI-U.
- Impacts are based on 2015 IMPLAN data for the state of Maryland, the most recent data available.
- Impacts are represented in 2017 dollars.
- Employment impacts include both full- and part-time employees. IMPLAN does not differentiate between full- and part-time employments.

The specific IMPLAN industry sectors used for the A&E districts can be found in Figure 25.

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

Figure 25: IMPLAN Industry Sectors

Input Category	IMPLAN Code	Description
<i>Commercial Employment</i>		
	396	Retail - Motor vehicle and parts dealers
	397	Retail - Furniture and home furnishings stores
	398	Retail - Electronics and appliance stores
	399	Retail - Building material and garden equipment and supplies stores
	400	Retail - Food and beverage stores
Retail	401	Retail - Health and personal care stores
	402	Retail - Gasoline stores
	403	Retail - Clothing and clothing accessories stores
	404	Retail - Sporting goods, hobby, musical instrument and book stores
	405	Retail - General merchandise stores
	406	Retail - Miscellaneous store retailers

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	501	Full-service restaurants
Restaurants	502	Limited-service restaurants
	503	All other food and drinking places
	423	Motion picture and video industries
	424	Sound recording industries
	433	Monetary authorities and depository credit intermediation
	438	Insurance agencies, brokerages, and related activities
	439	Funds, trusts, and other financial vehicles
	440	Real estate
	447	Legal services
	448	Accounting, tax preparation, bookkeeping, and payroll services
	450	Specialized design services
	454	Management consulting services
	456	Scientific research and development services
	457	Advertising, public relations, and related services
	458	Photographic services
	460	Marketing research and all other miscellaneous professional, scientific, and technical services
	464	Employment services
Businesses/ Organizations	466	Travel arrangement and reservation services
	474	Other educational services
	475	Offices of physicians
	476	Offices of dentists
	477	Offices of other health practitioners
	481	Other ambulatory health care services
	478	Outpatient care centers
	479	Medical and diagnostic laboratories
	483	Nursing and community care facilities
	484	Residential mental retardation, mental health, substance abuse and other facilities
	487	Child day care services
	488	Performing arts companies
	492	Independent artists, writers, and performers
	493	Museums, historical sites, zoos, and parks
	497	Fitness and recreational sports centers
	496	Other amusement and recreation industries
	500	Other accommodations
	508	Personal and household goods repair and maintenance
<i>Visitor Spending at Events/Festivals</i>		
Hotels	499	Hotels and motels, including casino hotels
Food	501	Full-service restaurants

	502	Limited-service restaurants
	503	All other food and drinking places
Retail	400	Retail - Food and beverage stores
	401	Retail - Health and personal care stores
	402	Retail - Gasoline stores
	403	Retail - Clothing and clothing accessories stores
	404	Retail - Sporting goods, hobby, musical instrument and book stores
	405	Retail - General merchandise stores
Transportation	408	Air transportation
	409	Rail transportation
	412	Transit and ground passenger transportation
	414	Scenic and sightseeing transportation and support activities for transportation
Entertainment	488	Performing arts companies
	489	Commercial Sports Except Racing
	490	Racing and Track Operation
	491	Promoters of performing arts and sports and agents for public figures
	492	Independent artists, writers, and performers
	493	Museums, historical sites, zoos, and parks
	497	Fitness and recreational sports centers
	498	Bowling centers
	496	Other amusement and recreation industries
Other	504	Automotive repair and maintenance, except car washes
	505	Car washes
	508	Personal and household goods repair and maintenance
	509	Personal care services
	511	Dry-cleaning and laundry services
	512	Other personal services

Source: IMPLAN

B.4 Exclusions

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

Due to the difficulty in determining if A&E district enterprises had been formed as a direct result of the A&E district designation or if these businesses had been formed as a result of some other factor(s), visitor/attendance data for A&E district enterprises (such as galleries) was not

included in the analysis. To avoid overstating the impact of property tax exemptions and therefore understating the tax impacts of the A&E districts, RESI excluded property tax exemptions, as no applications were shown to be approved when cross-referenced with SDAT's database.

Other A&E district operations that would contribute to positive economic impacts were excluded in the analysis due to data gaps. Such factors include the new art sales for artists and galleries, ticket/entry expenditures for arts enterprises, rental income from artists' space, and awarded grants.

Due to the limitations in this study, RESI recommends that MSAC consider the following for the next designation period and/or provide this information to RESI if it is available:

- Require uniform building inventories, including address, zoning type, square footage, land area, last sale date, last sale value, assessment value, age of building, and other pertinent details. For RESI's purposes, building zoning type, square footage, and the type of business would be most pertinent.
- Require detailed building data for new businesses in annual reports, especially with respect to business type, zoning type, building square footage, and the number of employees.
- Require detailed employment data for new and closing businesses in the annual report.
- Require detailed enterprise and event/festival data, including name, address, attendance, and ticket sales (where applicable), in annual reports.

B.5 Limitations of Provided Data

A&E districts are expected to complete annual reports to provide information regarding goals, accomplishments, new establishments, events/festivals and promotions, attendance figures, and awards and grants for the tax year. These reports were provided by MSAC and cover FY 2016. All A&E districts submitted reports for this period.

While each A&E district received identically formatted questions, not all reports were completed in the same way. For instance, all of the A&E districts did not provide a response for every question. In most cases, RESI could use data estimates for analysis purposes.

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

Appendix C—Glossary

A glossary of economic and tax impact terminology frequently used throughout this report can be found in Figure 26.

Figure 26: Glossary of Terms

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

Source: RESI

Appendix D—MSAC Annual Report



**Arts & Entertainment Districts
Annual Report**
Fiscal Year (FY) 2016
DEADLINE: September 30, 2016

FOR THE PERIOD: JULY 1, 2015 - JUNE 30, 2016

PLEASE COMPLETE THE FOLLOWING:

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

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

Stakeholder/Partner	Contact Name	E-Mail Address
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Please answer all questions adhering to word limits.

SECTION I: DISTRICT ACCOMPLISHMENTS DURING FY 2016

In SECTION I, please identify only the new initiatives, events, festivals, projects, or enterprises during FY 2016.

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

- A. Provide a narrative overview. (750 words or less)
- B. How many new initiatives were undertaken by district management during FY 2016? If none use 0. If yes, list each separately. (500 words or less)
- C. How many new events occurred in the district during FY 2016? If none use 0. If yes, list each separately. Indicate which were arts events.
(New events that are presented by organizations or enterprises other than the management of the A&E district should also be included but it must be a new public event. For example, ABC Arts Organization presents a new Halloween Lantern Parade that takes place in the district.)
- D. How many new festivals occurred in the district during FY 2016? If none use 0. If yes, list each separately. Indicate which were arts festivals.
(New festivals that are presented by organizations or enterprises other than the management of the A&E district should also be included but it must be a new public festival. For example, ABC Community Organization presents a new holiday festival of trees that takes place in the district.)
- E. How many new public art projects were initiated or completed in the district during FY 2016? If none use 0. If yes, list the name/location of each separately and indicate if the project is complete.
(New public art projects that are produced by organizations or enterprises other than the management of the A&E district should be included.)
- F. How many new capital projects were initiated or completed in the district during FY 2016? If none use 0. If yes, list the name/address of each separately and indicate if the project is complete.
(New capital projects that are undertaken by organizations or enterprises other than the management of the A&E district should also be included.)
- G. How many new retailers opened in the district during FY 2016? If none use 0. If yes, list each separately and indicate the number of full/part time jobs gained.
- H. How many new businesses opened in the district during FY 2016? If none use 0. If yes, list each separately and indicate the number of full/part time jobs gained:

SECTION V: DISTRICT ASSETS

A. DISTRICT ARTS AND ENTERTAINMENT ENTERPRISES – LIST ALL

For those organizations that perform, exhibit, or provide services outside of the district, only include attendance that occurs within the district under Total Estimated Annual Attendance.

Type of Enterprise	Names	Total Annual Attendance of Each
Number of Galleries/Co-ops:		
Number of Performance Venues:		
Number of Museums:		
Number of Arts Organizations:		
Number of Arts Education Organizations:		
Number of Public Art Pieces:		
Number of Art Suppliers/Services:		
Other:		

B. ARTIST HOUSING

Please list in this format:

Name	Number of Units	Developer
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C. OCCUPANCY RATE

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

Estimate the Occupancy Rate for each during FY 2013:

Storefront/Commercial	_____	%	<input type="checkbox"/> N/A
Residential (live/work)	_____	%	<input type="checkbox"/> N/A
Industrial/Manufacturing	_____	%	<input type="checkbox"/> N/A
Mixed Use	_____	%	<input type="checkbox"/> N/A

Estimate the Occupancy Rate for each during FY 2016:

Storefront/Commercial	_____	%	<input type="checkbox"/> N/A
Residential (live/work)	_____	%	<input type="checkbox"/> N/A
Industrial/Manufacturing	_____	%	<input type="checkbox"/> N/A
Mixed Use	_____	%	<input type="checkbox"/> N/A

SECTION VI: DISTRICT BENEFIT INFORMATION

A. If the district maintains an artist registry, answer the following:

What is the total number of registered artists working in the district?

Of those, what is the total number of new artists registered in FY 2016?

Estimate the number of artists working in the district that are not registered.

B. If the district does not maintain an artist registry, estimate the number of artists working in the district.

C. If the district has an artist relocation program, provide the number of artists relocating to the district during FY 2016 as a result of the program.

D. How many businesses in the district are eligible for an abatement of the Admission and Amusement Tax?

If applicable, list each:

E. How many property tax credits were applied for during FY 2016?

If applicable, list each developer:

F. Other than the state tax incentives, list all additional incentives provided by city/county.

G. Communication tools: check all that apply.

- Facebook
- Twitter
- Website
- Media page
- On-line events calendar
- Artist registry
- Other – specify:

SECTION VII: PUBLIC FUNDING

A. Indicate any federal or national funding applications/awards/grants during FY 2016:

ENTITY	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
National Endowment for the Arts	<input type="checkbox"/> Yes	\$ _____
National Trust for Historic Preservation	<input type="checkbox"/> Yes	\$ _____
ArtPlace America	<input type="checkbox"/> Yes	\$ _____
Other – Specify:	<input type="checkbox"/> Yes	\$ _____

B. If a Maryland State Arts Council grant was awarded to the A&E District during FY 2016 identify the Program (for example, A&E Technical Assistance, GFO) and grant amount:

MSAC PROGRAM	AWARD/GRANT AMOUNT
_____	\$ _____
_____	\$ _____
_____	\$ _____

C. Indicate any other state funding awards/grants to the A&E District during FY 2016:

ENTITY	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
Maryland Main Street	<input type="checkbox"/> Yes	\$ _____
Heritage Areas Authority/Planning	<input type="checkbox"/> Yes	\$ _____
Department of Transportation	<input type="checkbox"/> Yes	\$ _____
Department of Planning	<input type="checkbox"/> Yes	\$ _____
Capital Bond	<input type="checkbox"/> Yes	\$ _____
Other – Specify:	<input type="checkbox"/> Yes	\$ _____
Other – Specify:	<input type="checkbox"/> Yes	\$ _____

D. Indicate any local awards/grants to the A&E District in FY 2016.

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

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

ENTITY	AMOUNT
_____	\$ _____
_____	\$ _____

- F. If your district receives in-kind support, (for example, office space, administrative support) indicate who provides the in-kind support and the value.

ENTITY	AMOUNT
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

SECTION VIII: FY 2016 (JULY 1, 2014 – JUNE 30, 2014) GOALS AND WORK PLAN

- A. Identify your district’s FY 2016 goals. (500 words or less)
- B. Summarize your district’s FY 2016 work plan to achieve these goals. (500 words or less)

SECTION IX: MSAC TECHNICAL ASSISTANCE

- A. What type of technical assistance would serve to strengthen your A&E District? (500 words or less) E.g., Board Development, Financial Management, Fundraising, Funding Opportunities, Other

SECTION X. CERTIFICATION

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

Name _____
 Title _____
 Date _____

Checking this box verifies that the name typed above is authorized to sign this Maryland State Arts Council A&E Districts Annual Report on behalf of the A&E District and certifies that all information contained in this report is true and accurate to the best of the signatory’s knowledge. Checking this box verifies that the applicant agrees to complete and submit this report by electronic means, including the use of an electronic signature.

Appendix E—A&E District Websites

For reference purposes, the counties and websites for each A&E district (where available) can be found in Figure 27.

Figure 27: A&E District Websites

District	County	Website
Annapolis	Anne Arundel	http://www.annapolisarts.org /
Bel Air	Harford	http://www.belairartsandentertainment.org/
Berlin	Worcester	http://www.berlinmainstreet.com/ https://www.artsinberlin.org/
Bethesda	Montgomery	http://www.bethesda.org/bethesda/arts-entertainment
Bromo Tower	Baltimore City	https://www.bromodistrict.org/
Cambridge	Dorchester	https://www.choosecambridge.com/
Chestertown	Kent	http://townofchestertown.com/ae-district/
Cumberland	Allegany	http://www.alleganyartscouncil.org/resource.php?id=4
Denton	Caroline	https://carolinearts.org/denton-artsway/
Elkton	Cecil	http://www.elktonalliance.org/arts-entertainment-district
Frederick	Frederick	http://www.downtownfrederick.org/members/members/index/1
Frostburg	Allegany	http://www.downtownfrostburg.com/the-arts/
Gateway	Prince George's	http://mygatewayarts.org/
Grantsville	Garrett	http://www.visitgrantsville.com/about/arts-entertainment-district/
Hagerstown	Washington	http://hagerstownmd.org/157/Arts-Entertainment-District
Havre de Grace	Harford	http://hdgartscollective.org/arts-entertainment-district/
Highlandtown	Baltimore City	http://www.highlandtownarts.com/
Leonardtwn	St. Mary's	http://www.stmarysartscouncil.com/arts--entertainment-district.html
Salisbury	Wicomico	https://www.salisburyartsdistrict.com/
Silver Spring	Montgomery	http://silverspringdowntown.com/
Snow Hill	Worcester	http://www.snowhillmd.com/liveHere/maps.cfm
Station North	Baltimore City	http://www.stationnorth.org/
Stevensville	Queen Anne's	http://stevensvilleartsandentertainment.org/
Wheaton	Montgomery	https://www.wheatonmd.org/aande-district

Source: MSAC

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