

# Maryland Arts and Entertainment Districts Impact Analysis FY 2014

*Prepared for*  
Maryland State Arts Council

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## 1.0 Executive Summary

### 1.1 Overview

The Maryland State Arts Council (MSAC) sought a report detailing the economic and fiscal impacts of the 22 Maryland Arts and Entertainment Districts (A&E districts) in existence during the study period, fiscal year (FY) 2014, on Maryland's economy. As one of the first states to develop this designation, Maryland's A&E districts serve as a case study and leading example for other states. Other states have since created similar designations based on Maryland's program.

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

This analysis answers the following questions:

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

### 1.2 Summary of Findings

Below are RESI's key findings in regard to the economic and fiscal impacts of the A&E districts for FY 2014.<sup>1</sup>

#### Economic Impacts

- The A&E districts' operations supported an estimated 6,000 direct, indirect, and induced jobs during the period.
  - Approximately 1,211 of these jobs were generated by new businesses formed within A&E districts' boundaries during the period.
  - The other 4,766 jobs were supported by visitor spending at events supported by the A&E districts during the period.
- Nearly \$571.4 million in total state GDP were supported by the A&E districts during the period.
  - Approximately \$136.9 million were generated by new businesses formed within A&E districts' boundaries during the period.
  - The other \$434.4 million were supported by visitor spending at events supported by the A&E districts during the period.
- More than \$198.5 million in total wages were supported by the A&E districts during the period.

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

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- Approximately \$50.1 million were generated by new businesses formed within A&E districts' boundaries during the period.
- The other \$148.4 million were supported by visitor spending at events supported by the A&E districts during the period.

### Fiscal Impacts

- New businesses formed within A&E districts' boundaries during the study period generated nearly \$7.9 million in tax revenues.<sup>2</sup>
- Visitor spending at events supported by the A&E districts supported more than \$30.6 million in tax revenues during the study period.
- The total tax revenue impact of the A&E districts came to approximately \$38.5 million during the study period.

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

## 2.0 Introduction

The Maryland State Arts Council (MSAC) sought a report detailing the economic and fiscal impacts of the 22 Maryland Arts and Entertainment Districts (A&E districts) in existence during the study period, fiscal year (FY) 2014, on Maryland's economy. As one of the first states to develop this designation, Maryland's A&E districts serve as a case study and leading example for other states. Other states have since created similar designations based on Maryland's program.

To achieve the project objective, the Regional Economic Studies Institute (RESI) of Towson University estimated job creation, state GDP (also referred to as output), and wages attributable to the A&E districts in 2014.<sup>3</sup> These results were broken down by type of impact (direct, indirect, and induced). RESI also estimated the fiscal impacts associated with the program. Fiscal impacts were then compared against estimated tax revenue losses associated with the tax incentives available to and used by districts. The project team considered grants where applicable.

This analysis answers the following questions:

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

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

## 3.0 Findings

### 3.1 Economic Impacts

To determine the economic impacts, RESI used A&E district application materials and annual reports provided by MSAC. For a list of the annual report data provided, please refer to Appendix A. A summary of the total economic impacts generated by both new businesses and supported by visitor spending at events supported by the A&E districts can be found in Figure 1.

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<sup>3</sup> For definitions of terms, please refer to Appendix B.

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**Figure 1: Economic Impact Summary<sup>4</sup>**

District	Designation Year	Employment	State GDP	Wages
Annapolis	2008	62.1	\$6,221,185	\$2,386,226
Bel Air	2010	522.0	\$51,533,976	\$17,317,867
Berlin	2005	198.8	\$18,960,288	\$6,349,766
Bethesda	2002	632.4	\$61,385,195	\$20,787,939
Bromo Tower	2013	14.0	\$2,410,358	\$846,162
Cambridge	2003	98.2	\$9,739,339	\$3,582,335
Cumberland	2002	363.7	\$37,309,615	\$12,873,199
Denton	2005	38.4	\$3,399,364	\$1,176,631
Elkton	2006	87.0	\$8,092,239	\$2,742,363
Frederick	2003	931.6	\$83,212,430	\$28,903,939
Frostburg	2009	43.8	\$4,638,991	\$1,485,007
Gateway	2002	52.4	\$4,951,084	\$1,744,527
Hagerstown	2002	298.4	\$26,785,925	\$9,235,623
Havre de Grace	2008	152.0	\$13,808,946	\$4,775,061
Highlandtown	2003	95.3	\$9,114,963	\$3,284,303
Leonardtwn	2014	198.4	\$18,734,666	\$6,501,109
Salisbury	2007	254.5	\$26,194,148	\$9,141,512
Silver Spring	2002	1395.3	\$136,562,196	\$48,285,894
Snow Hill	2006	18.3	\$1,782,591	\$607,955
Station North	2002	340.5	\$29,704,697	\$10,321,727
Stevensville	2014	6.0	\$476,566	\$164,909
Wheaton	2006	174.1	\$16,338,678	\$5,991,571
<b>Total</b>		<b>5977.1</b>	<b>\$571,357,436</b>	<b>\$198,505,625</b>

Sources: IMPLAN, RESI

According to RESI's analysis, the A&E districts collectively supported approximately 6,000 jobs and have generated nearly \$571.4 million and \$198.5 million in state GDP and wages, respectively, during FY 2014 based on provided data.

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

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

**Maryland Arts and Entertainment Districts Impact Analysis FY 2014**  
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**Figure 2: Total Employment Impacts**

District	Direct	Indirect	Induced	Total
<b>New Businesses</b>				
Annapolis	13.0	2.7	4.8	20.5
Bel Air	41.6	11.1	13.2	65.9
Berlin	33.5	5.4	6.7	45.6
Bethesda	214.1	31.2	49.1	294.5
Bromo Tower	(3.0)	0.4	2.2	(0.4)
Cambridge	24.2	4.0	7.6	35.8
Cumberland	37.5	13.9	16.2	67.6
Denton	0.0	0.0	0.0	0.0
Elkton	9.0	1.0	1.5	11.5
Frederick	64.5	8.3	12.7	85.6
Frostburg	0.0	1.8	1.0	2.8
Gateway	16.0	2.0	3.6	21.6
Hagerstown	28.0	3.2	5.5	36.7
Havre de Grace	2.0	(0.1)	0.3	2.2
Highlandtown	31.0	3.7	7.1	41.8
Leonardtwn	24.5	5.0	6.8	36.3
Salisbury	59.5	13.5	18.2	91.2
Silver Spring	163.8	31.6	56.5	251.9
Snow Hill	(1.0)	0.5	0.2	(0.4)
Station North	5.0	0.3	0.6	5.9
Stevensville	2.5	0.2	0.4	3.0
Wheaton	66.0	9.7	16.3	92.0
<b>Subtotal</b>	<b>831.7</b>	<b>149.5</b>	<b>230.3</b>	<b>1,211.5</b>
<b>Event Spending</b>				
Annapolis	31.0	4.5	6.0	41.5
Bel Air	340.8	48.7	66.6	456.1
Berlin	113.7	17.0	22.6	153.3
Bethesda	254.6	34.4	48.8	337.9
Bromo Tower	10.6	1.6	2.1	14.3
Cambridge	47.1	6.4	9.0	62.5
Cumberland	219.5	33.5	43.1	296.1
Denton	28.8	4.2	5.4	38.4
Elkton	56.1	8.3	11.1	75.5
Frederick	631.5	93.5	121.0	846.1
Frostburg	30.5	4.6	6.0	41.0
Gateway	22.9	3.4	4.4	30.8
Hagerstown	197.2	27.3	37.2	261.7
Havre de Grace	111.6	16.6	21.6	149.8
Highlandtown	39.7	5.9	7.9	53.5
Leonardtwn	120.0	18.4	23.7	162.1
Salisbury	121.3	17.8	24.1	163.3
Silver Spring	851.5	125.8	166.1	1,143.4
Snow Hill	13.9	2.1	2.7	18.6
Station North	250.5	36.9	47.2	334.6
Stevensville	2.2	0.3	0.4	3.0
Wheaton	62.4	8.2	11.5	82.2
<b>Subtotal</b>	<b>3,557.5</b>	<b>519.4</b>	<b>688.8</b>	<b>4,765.7</b>
<b>Total</b>	<b>4,389.2</b>	<b>668.8</b>	<b>919.2</b>	<b>5,977.1</b>

Sources: IMPLAN, RESI

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**Figure 3: Total State GDP Impacts**

District	Direct	Indirect	Induced	Total
<b>New Businesses</b>				
Annapolis	\$1,285,740	\$358,888	\$662,910	\$2,307,537
Bel Air	\$5,192,694	\$1,806,856	\$1,801,417	\$8,800,966
Berlin	\$2,775,398	\$896,731	\$914,804	\$4,586,932
Bethesda	\$19,370,106	\$4,941,893	\$6,725,226	\$31,037,225
Bromo Tower	\$728,454	\$69,509	\$298,977	\$1,096,940
Cambridge	\$2,436,892	\$598,998	\$1,038,911	\$4,074,801
Cumberland	\$5,931,470	\$2,277,747	\$2,216,679	\$10,425,897
Denton	\$0	\$0	\$0	\$0
Elkton	\$609,183	\$171,240	\$206,507	\$986,930
Frederick	\$4,563,099	\$1,365,545	\$1,743,795	\$7,672,440
Frostburg	\$403,153	\$296,494	\$138,348	\$837,995
Gateway	\$1,407,356	\$297,542	\$498,186	\$2,203,084
Hagerstown	\$1,983,971	\$532,019	\$747,338	\$3,263,328
Havre de Grace	\$32,388	-\$5,594	\$40,514	\$67,308
Highlandtown	\$2,442,330	\$589,232	\$966,183	\$3,997,745
Leonardtwn	\$2,168,105	\$699,211	\$926,528	\$3,793,843
Salisbury	\$6,790,789	\$2,052,184	\$2,491,491	\$11,334,463
Silver Spring	\$18,401,612	\$4,735,654	\$7,743,838	\$30,881,105
Snow Hill	\$25,542	\$22,388	\$20,630	\$68,560
Station North	\$165,779	\$34,557	\$82,158	\$282,495
Stevensville	\$125,515	\$25,029	\$48,861	\$199,405
Wheaton	\$5,228,387	\$1,539,349	\$2,229,282	\$8,997,018
<b>Subtotal</b>	<b>\$82,067,962</b>	<b>\$23,305,471</b>	<b>\$31,542,584</b>	<b>\$136,916,016</b>
<b>Event Spending</b>				
Annapolis	\$2,387,849	\$702,776	\$823,023	\$3,913,648
Bel Air	\$26,036,562	\$7,572,880	\$9,123,567	\$42,733,009
Berlin	\$8,711,451	\$2,571,087	\$3,090,818	\$14,373,356
Bethesda	\$18,351,126	\$5,307,819	\$6,689,025	\$30,347,970
Bromo Tower	\$788,986	\$230,394	\$294,038	\$1,313,418
Cambridge	\$3,436,813	\$989,915	\$1,237,809	\$5,664,537
Cumberland	\$16,097,143	\$4,881,416	\$5,905,159	\$26,883,718
Denton	\$2,033,155	\$621,444	\$744,766	\$3,399,364
Elkton	\$4,318,523	\$1,269,512	\$1,517,273	\$7,105,308
Frederick	\$45,229,544	\$13,738,690	\$16,571,756	\$75,539,990
Frostburg	\$2,295,971	\$687,788	\$817,238	\$3,800,996
Gateway	\$1,641,763	\$500,166	\$606,071	\$2,748,000
Hagerstown	\$14,233,527	\$4,193,585	\$5,095,485	\$23,522,597
Havre de Grace	\$8,293,551	\$2,487,902	\$2,960,186	\$13,741,638
Highlandtown	\$3,125,387	\$914,877	\$1,076,953	\$5,117,217
Leonardtwn	\$8,985,328	\$2,707,190	\$3,248,305	\$14,940,823
Salisbury	\$8,922,203	\$2,633,596	\$3,303,886	\$14,859,685
Silver Spring	\$63,907,346	\$19,027,438	\$22,746,307	\$105,681,091
Snow Hill	\$1,033,545	\$309,423	\$371,063	\$1,714,031
Station North	\$17,564,883	\$5,387,630	\$6,469,688	\$29,422,202
Stevensville	\$167,459	\$49,536	\$60,166	\$277,161
Wheaton	\$4,462,730	\$1,297,195	\$1,581,734	\$7,341,660
<b>Subtotal</b>	<b>\$262,024,845</b>	<b>\$78,082,260</b>	<b>\$94,334,315</b>	<b>\$434,441,420</b>
<b>Total</b>	<b>\$344,092,807</b>	<b>\$101,387,730</b>	<b>\$125,876,899</b>	<b>\$571,357,436</b>

Sources: IMPLAN, RESI

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**Figure 4: Total Wage Impacts**

District	Direct	Indirect	Induced	Total
<b>New Businesses</b>				
Annapolis	\$718,151	\$141,236	\$214,982	\$1,074,369
Bel Air	\$1,663,972	\$622,149	\$584,235	\$2,870,357
Berlin	\$895,927	\$289,992	\$296,671	\$1,482,590
Bethesda	\$6,542,085	\$1,616,914	\$2,181,469	\$10,340,468
Bromo Tower	\$270,078	\$26,703	\$97,036	\$393,816
Cambridge	\$1,098,232	\$208,771	\$336,953	\$1,643,957
Cumberland	\$2,212,327	\$785,209	\$718,762	\$3,716,298
Denton	\$0	\$0	\$0	\$0
Elkton	\$216,296	\$50,713	\$66,971	\$333,980
Frederick	\$1,847,865	\$430,833	\$565,499	\$2,844,197
Frostburg	\$39,501	\$105,931	\$44,893	\$190,325
Gateway	\$535,853	\$99,729	\$161,570	\$797,152
Hagerstown	\$808,364	\$166,069	\$242,357	\$1,216,790
Havre de Grace	\$53,745	\$8,231	\$13,131	\$75,107
Highlandtown	\$1,057,148	\$188,499	\$313,340	\$1,558,987
Leonardtwn	\$875,264	\$234,592	\$300,551	\$1,410,407
Salisbury	\$2,491,648	\$710,702	\$808,009	\$4,010,359
Silver Spring	\$8,308,051	\$1,639,617	\$2,511,404	\$12,459,072
Snow Hill	\$4,524	\$10,804	\$6,700	\$22,028
Station North	\$89,041	\$13,241	\$26,648	\$128,930
Stevensville	\$46,083	\$8,239	\$15,853	\$70,175
Wheaton	\$2,241,341	\$520,458	\$723,065	\$3,484,865
<b>Subtotal</b>	<b>\$32,015,497</b>	<b>\$7,878,634</b>	<b>\$10,230,099</b>	<b>\$50,124,230</b>
<b>Event Spending</b>				
Annapolis	\$818,478	\$226,454	\$266,925	\$1,311,857
Bel Air	\$9,039,411	\$2,449,038	\$2,959,060	\$14,447,510
Berlin	\$3,024,619	\$840,085	\$1,002,472	\$4,867,176
Bethesda	\$6,567,966	\$1,709,921	\$2,169,584	\$10,447,470
Bromo Tower	\$281,029	\$75,940	\$95,377	\$452,345
Cambridge	\$1,218,851	\$318,048	\$401,479	\$1,938,378
Cumberland	\$5,638,641	\$1,602,869	\$1,915,391	\$9,156,901
Denton	\$732,445	\$202,632	\$241,553	\$1,176,631
Elkton	\$1,502,544	\$413,745	\$492,094	\$2,408,383
Frederick	\$16,195,094	\$4,489,761	\$5,374,887	\$26,059,742
Frostburg	\$804,664	\$224,963	\$265,055	\$1,294,682
Gateway	\$586,778	\$164,019	\$196,578	\$947,375
Hagerstown	\$5,020,513	\$1,345,651	\$1,652,668	\$8,018,833
Havre de Grace	\$2,928,031	\$811,853	\$960,070	\$4,699,953
Highlandtown	\$1,078,399	\$297,644	\$349,273	\$1,725,316
Leonardtwn	\$3,147,525	\$889,606	\$1,053,571	\$5,090,702
Salisbury	\$3,193,729	\$865,786	\$1,071,638	\$5,131,153
Silver Spring	\$22,259,668	\$6,189,655	\$7,377,500	\$35,826,823
Snow Hill	\$364,333	\$101,246	\$120,349	\$585,927
Station North	\$6,337,527	\$1,756,906	\$2,098,363	\$10,192,796
Stevensville	\$58,978	\$16,242	\$19,514	\$94,734
Wheaton	\$1,582,075	\$411,627	\$513,005	\$2,506,707
<b>Subtotal</b>	<b>\$92,381,297</b>	<b>\$25,403,693</b>	<b>\$30,596,406</b>	<b>\$148,381,395</b>
<b>Total</b>	<b>\$124,396,793</b>	<b>\$33,282,327</b>	<b>\$40,826,505</b>	<b>\$198,505,625</b>

Sources: IMPLAN, RESI

Previous studies have yielded results comparable to RESI's findings. For a summary of results from past impact analyses, please refer to Section 4.0.<sup>5</sup>

### **3.2 Fiscal Impacts**

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

Fiscal impacts—specifically, property tax revenues—would traditionally be compared against estimated tax revenue losses associated with the property tax incentives available to and used by A&E districts. Data from the A&E district annual reports did indicate that one property 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 A.

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

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**Figure 5: Total Fiscal Impacts**

District	Tax Revenue Type					Total
	Property	Income	Sales	Payroll	Other	
<b>New Businesses</b>						
Annapolis	\$23,947	\$37,245	\$20,291	\$1,678	\$13,820	\$96,981
Bel Air	\$168,629	\$101,248	\$144,700	\$4,483	\$67,169	\$486,229
Berlin	\$110,621	\$51,386	\$95,092	\$2,316	\$36,186	\$295,601
Bethesda	\$694,225	\$379,858	\$596,127	\$16,150	\$260,304	\$1,946,664
Bromo Tower	-\$59,407	\$17,131	-\$51,571	\$615	-\$3,842	-\$97,074
Cambridge	\$72,037	\$58,520	\$61,642	\$2,568	\$29,652	\$224,419
Cumberland	-\$51,195	\$124,049	-\$45,673	\$5,804	\$32,902	\$65,887
Denton	\$0	\$0	\$0	\$0	\$0	\$0
Elkton	\$27,397	\$11,608	\$23,564	\$522	\$8,351	\$71,442
Frederick	\$245,164	\$97,923	\$210,928	\$4,443	\$71,268	\$629,726
Frostburg	\$5,095	\$7,847	\$4,319	\$297	\$4,060	\$21,618
Gateway	\$34,885	\$28,025	\$29,855	\$1,245	\$15,660	\$109,670
Hagerstown	\$74,367	\$41,973	\$63,844	\$1,901	\$25,776	\$207,861
Havre de Grace	\$7,517	\$2,240	\$6,476	\$118	\$1,940	\$18,291
Highlandtown	\$106,861	\$106,861	\$106,861	\$106,861	\$106,861	\$106,861
Leonardtwn	\$83,458	\$52,384	\$71,589	\$2,203	\$29,513	\$239,147
Salisbury	\$198,798	\$139,966	\$170,355	\$6,264	\$82,265	\$597,648
Silver Spring	\$719,128	\$435,344	\$617,039	\$19,460	\$260,488	\$2,051,459
Snow Hill	\$2,070	\$1,198	\$1,776	\$35	\$1,017	\$6,096
Station North	\$14,239	\$4,633	\$12,262	\$201	\$3,855	\$35,190
Stevensville	\$5,893	\$2,779	\$5,066	\$110	\$1,969	\$15,817
Wheaton	\$274,918	\$125,699	\$236,349	\$5,443	\$83,975	\$726,384
<b>Subtotal</b>	<b>\$2,758,647</b>	<b>\$1,827,917</b>	<b>\$2,380,891</b>	<b>\$182,717</b>	<b>\$1,133,189</b>	<b>\$7,855,917</b>
<b>Event Spending</b>						
Annapolis	\$107,441	\$46,309	\$92,400	\$2,049	\$33,676	\$281,875
Bel Air	\$1,199,894	\$513,733	\$1,031,949	\$22,565	\$373,946	\$3,142,087
Berlin	\$394,729	\$174,125	\$339,422	\$7,602	\$124,528	\$1,040,406
Bethesda	\$812,841	\$377,154	\$698,742	\$16,317	\$258,012	\$2,163,066
Bromo Tower	\$34,189	\$16,602	\$29,382	\$706	\$11,068	\$91,947
Cambridge	\$153,518	\$69,777	\$131,984	\$3,028	\$48,460	\$406,767
Cumberland	\$666,461	\$333,143	\$572,640	\$14,302	\$219,680	\$1,806,226
Denton	\$87,911	\$41,935	\$75,558	\$1,838	\$28,349	\$235,591
Elkton	\$201,024	\$85,410	\$172,895	\$3,761	\$62,596	\$525,686
Frederick	\$1,952,006	\$933,557	\$1,677,688	\$40,701	\$630,496	\$5,234,448
Frostburg	\$103,911	\$46,008	\$89,350	\$2,022	\$32,818	\$274,109
Gateway	\$69,411	\$34,162	\$59,645	\$1,480	\$22,666	\$187,364
Hagerstown	\$620,005	\$287,083	\$532,982	\$12,524	\$197,641	\$1,650,235
Havre de Grace	\$376,132	\$166,611	\$323,424	\$7,341	\$118,622	\$992,130
Highlandtown	\$150,185	\$60,569	\$129,205	\$2,694	\$46,073	\$388,726
Leonardtwn	\$391,990	\$183,064	\$336,952	\$7,951	\$126,146	\$1,046,103
Salisbury	\$390,629	\$186,365	\$335,738	\$8,014	\$125,698	\$1,046,444
Silver Spring	\$2,798,499	\$1,281,320	\$2,405,866	\$55,956	\$893,493	\$7,435,134
Snow Hill	\$46,431	\$20,897	\$39,921	\$916	\$14,721	\$122,886
Station North	\$747,419	\$364,381	\$642,305	\$15,919	\$242,834	\$2,012,858
Stevensville	\$7,611	\$3,389	\$6,544	\$148	\$2,404	\$20,096
Wheaton	\$198,637	\$89,058	\$170,789	\$3,915	\$62,419	\$524,818
<b>Subtotal</b>	<b>\$11,510,874</b>	<b>\$5,314,652</b>	<b>\$9,895,381</b>	<b>\$231,749</b>	<b>\$3,676,346</b>	<b>\$30,629,002</b>
<b>Total</b>	<b>\$14,269,521</b>	<b>\$7,142,569</b>	<b>\$12,276,272</b>	<b>\$414,466</b>	<b>\$4,809,535</b>	<b>\$38,484,919</b>

Sources: IMPLAN, RESI

## 4.0 Literature Review

RESI analyzed findings from similar studies conducted for comparable programs and/or designations. Across the nation, there has been an increased interest in establishing arts, culture, and entertainment districts. According to the National Assembly of State Arts Agencies, twelve states had “established 156 unique cultural districts across the country” as of 2012.<sup>6</sup> In addition to Maryland, Arkansas, Colorado, Indiana, Iowa, Kentucky, Louisiana, Massachusetts, New Mexico, Rhode Island, Texas, and West Virginia have cultural or similar district designations.<sup>7</sup> Since 2012, Oklahoma and South Carolina have also established cultural districts.<sup>8</sup>

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

Nationally, the 2010 economic impact of the nonprofit arts and culture industry was determined to have generated \$135.2 billion in total direct expenditures, supported 4.1 million full-time equivalent jobs, and to have generated \$86.7 billion in resident household income, \$12.7 billion in local and state government income, and \$9.6 billion in federal tax revenue.<sup>12</sup> In late 2013, the U.S. Bureau of Economic Analysis and the National Endowment for the Arts announced that in arts and cultural production accounted for 3.2 percent of total gross domestic product in 2011—a total of more than \$500 billion.<sup>13</sup> Arts and cultural production has

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<sup>6</sup> National Assembly of State Arts Agencies, “State Policy Briefs: Tools for Arts Decision Making,” 1, 2012, accessed January 31, 2014, <http://www.nasaa-arts.org/Research/Key-Topics/Creative-Economic-Development/StateCulturalDistrictsPolicyBrief.pdf>.

<sup>7</sup> National Assembly of State Arts Agencies, “State Arts Agency Creative Economy Initiates,” accessed January 31, 2014, <http://www.nasaa-arts.org/Research/Key-Topics/Creative-Economic-Development/State-Arts-Agency-Creative-Economy-Initiatives.php>.

<sup>8</sup> Ibid.

<sup>9</sup> Americans for the Arts, “About Americans for the Arts,” accessed January 31, 2014, <http://www.americansforthearts.org/about-americans-for-the-arts>.

<sup>10</sup> Americans for the Arts, “Reports and Data,” accessed January 31, 2014, <http://www.americansforthearts.org/by-program/reports-and-dat>.

<sup>11</sup> Americans for the Arts, “Arts & Economic Prosperity IV: The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences Summary Report,” May 14, 2012, accessed January 28, 2013, [http://www.artsusa.org/pdf/information\\_services/research/services/economic\\_impact/aepiv/AEP4\\_NationalSummaryReport.pdf](http://www.artsusa.org/pdf/information_services/research/services/economic_impact/aepiv/AEP4_NationalSummaryReport.pdf).

<sup>12</sup> Ibid, 3.

<sup>13</sup> “U.S. Bureau of Economic Analysis and National Endowment for the Arts Release Preliminary Report on Impact of Arts and Culture on U.S. Economy,” National Endowment for the Arts, December 5, 2013, accessed January 30, 2015, <http://arts.gov/news/2013/us-bureau-economic-analysis-and-national-endowment-arts-release-preliminary-report-impact#sthash.AumRPyaS.dpuf>.

consistently accounted for 3.2 to 3.7 percent of total gross domestic product for more than a decade.<sup>14</sup>

Even more impressive than the vast national impacts of the nonprofit arts and cultural industry are the impacts the industry has on individual regions and states. While the *Arts & Economic Prosperity IV* summary report detailed statewide impacts, several states have released independent studies regarding the state-level economic impacts of the arts since the last Americans for the Arts release. RESI compiled a sample of state reports for comparison purposes. A summary of these impacts can be found in Figure 6.

**Figure 6: Summary of Similar Studies<sup>15</sup>**

State	State GDP	Employment	Wages	State and Local Revenue
Arizona	\$581,318,224	56,112	N/A	N/A
California	\$273,500,000,000	1,400,000	\$99,300,000,000	\$13,000,000,000
District of Columbia	\$334,000,000	4,970	\$141,800,000	\$7,300,000
Michigan	N/A	74,049	\$4,554,832,145	N/A
New Mexico	\$5,591,991,000	76,756	\$2,213,248,000	\$137,131,457

Source: Various<sup>16</sup>

At present, initial reported figures regarding impacts 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 IV* considered only the direct industry expenditures to determine the economic impacts, whereas RESI considers event-related spending and business openings and closings when determining the economic impacts. Additionally, 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 with RESI’s findings, this comparison can serve as a starting point for consideration. As more and more A&E districts and similar designations are created, more research and analysis regarding the specific economic impacts associated with such designations and/or programs will become available.

## 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 6,000 jobs during FY 2014.

<sup>14</sup> “U.S. Bureau of Economic Analysis and National Endowment for the Arts Release Preliminary Report on Impact of Arts and Culture on U.S. Economy,” National Endowment for the Arts.

<sup>15</sup> Sources presented in the literature review mainly reported employment and other impact figures. RESI generally reports employment, state GDP, and wage impact figures. For more information regarding IMPLAN and its output, please refer to Appendix A.

<sup>16</sup> For a full list of the references used, please refer to Section 6.0.

Approximately 1,211 of these jobs were generated by new businesses; the remaining 4,766 jobs were supported by visitor spending at events. In addition, nearly \$571.4 million in total state GDP were supported by the A&E districts during the period—\$136.9 million by new businesses and \$434.4 million by visitor spending. Moreover, total wages of more than \$198.5 million were supported by the A&E districts during the period. Approximately \$50.1 million in wages were generated by new businesses and \$148.4 million were supported by visitor spending at events.

New businesses formed within the A&E districts' boundaries during the study period generated nearly \$7.9 million in state and local tax revenues.<sup>17</sup> Visitor spending at events supported by the A&E districts supported more than \$30.6 million in state and local tax revenues. The total tax revenue impact of the A&E districts came to approximately \$38.5 million during the study period. As a result of approved property tax incentive applications, the total net property tax revenue for the average A&E district property would be less than the estimated generated property taxes provided when exemptions are taken into consideration.

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<sup>17</sup> Total tax revenues refer to property, income, sales, payroll, and other tax revenues supported on the state and local level.

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## Appendix A—Methodology

### A.1 IMPLAN Model Overview

To quantify the economic and fiscal impacts of the A&E districts on Maryland, RESI utilized the IMPLAN input/output model. This model enumerates the employment and fiscal impact of each dollar earned and spent by the following: employees of the district, other supporting vendors (business services, retail, etc.), each dollar spent by these vendors on other firms and each dollar spent by the households' 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.<sup>18</sup>

### A.2 Input Assumptions

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

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

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<sup>18</sup> Total economic impact is defined as the sum of direct, indirect, and induced effects.

In cases of missing building data, RESI used proxy estimators in regard to size of businesses and commercial real estate based on application data. Historical buildings at times may be exempt from zoning restrictions due to size or being “grandfathered” into clauses in current legislation. The project team used average square footage as some businesses have a larger space than those that have originated in the last 20 to 30 years. The project team then used these square footage estimates and applied them to research regarding average square footage per employee to determine estimated direct employment where the data were not provided. Square footage, when reported by A&E districts, refers to the enclosed square footage of the buildings in the A&E districts. In cases where square footage was not reported, gross square footage was calculated from property records. Using floor area ratio (FAR) estimates based on the population of an area, the project team calculated the maximum enclosed square footage possible. Enclosed square footage for districts missing this data was defined as gross square footage multiplied by FAR estimates.<sup>19</sup>

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

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<sup>19</sup> Nelson, Arthur C. *Planner’s Estimating Guide: Projecting Land-use and Facility Needs*. Chicago: American Planning Association, 2004. Print.

**Maryland Arts and Entertainment Districts Impact Analysis FY 2014**  
RESI of Towson University

**Figure 7: Event Spending Data Summary<sup>20</sup>**

Events	Hotels	Transportation	Food and Beverage	Retail	Entertainment	Other	Total Spending	Total Attendance
<b>Community</b>								
2011 Dolores River Festival (CO)	\$935	\$8,121	\$36,957	\$13,995	N/A	n/a	\$40,400,000	2,225
2011 Family Gras Weekend in Jefferson Parish (LA)	\$892,516	\$91,708	\$2,741,058	\$656,871	\$2,191,123	N/A	\$6,573,276	85,000
2010 Robbers Cave Fall Festival (OK)	\$152,600	\$536,300	\$505,400	\$1,083,600	\$123,200	\$35,000	\$2,436,100	70,000
2010 Market Street Festival in Ocean Springs (MS)	\$2,182,532	\$1,899,124	\$6,003,997	\$2,388,666	\$2,309,157	N/A	\$14,783,475	34,000
<b>Average</b>	<b>\$19.32</b>	<b>\$17.06</b>	<b>\$58.17</b>	<b>\$24.94</b>	<b>\$31.82</b>	<b>\$0.50</b>		
<b>Culture</b>								
2011 Irish Fair (MN)	\$305,820	\$523,800	\$2,798,660	\$1,193,010	N/A	\$154,380	\$4,975,670	100,000
2011 Bayou Boogaloo Festival (LA)	\$150,413	\$47,070	\$285,080	\$62,808	\$197,934	N/A	\$743,305	27,000
2010 Twin Cities Pride Festival & Parade (MN)	\$4,488,242	\$1,037,402	\$10,374,925	\$2,297,011	\$1,267,616	\$2,285,680	\$21,750,875	400,000
2009 Albuquerque Balloon Fiesta (NM)	\$36,679,120	\$11,745,796	\$23,272,837	\$21,731,943	\$10,638,712	\$2,082,327	\$106,150,735	761,864
<b>Average</b>	<b>\$17.00</b>	<b>\$6.25</b>	<b>\$23.76</b>	<b>\$12.13</b>	<b>\$8.15</b>	<b>\$3.33</b>		
<b>Film</b>								
2013 Sundance Film Festival (UT)	\$24,232,762	\$4,561,026	\$16,020,042	\$7,583,367	\$4,328,889	n/a	\$56,726,086	45,947
2009 Durango Film Fest (CO)	\$7,921	\$3,993	\$19,064	\$5,545	N/A	\$1,792	\$38,315	425
2009 Big Sky Documentary Film Festival (MT)	\$2,167,340	\$216,734	\$11,582,802	\$464,156	\$186,046	\$310,716	\$14,927,794	9,590
2007 Eugene International Film Festival (IA)	\$190,368	\$11,340	\$80,220	\$61,320	\$57,540	\$22,680	\$423,468	32,457
<b>Average</b>	<b>\$194.48</b>	<b>\$32.90</b>	<b>\$400.95</b>	<b>\$57.10</b>	<b>\$28.85</b>	<b>\$12.44</b>		
<b>Fine Art</b>								
2010 Columbus Arts Festival (OH)	\$1,564,500	\$675,500	\$4,564,000	\$2,569,000	N/A	\$612,500	\$9,985,500	350,000
2010 Peter Anderson (MS)	\$3,744,387	\$1,270,196	\$2,735,131	\$9,224,279	n/a	\$5,691,227	\$14,783,475	104,562
2009 Artscape (MD)	\$275,699	\$1,300,406	\$2,370,143	\$1,738,376	\$1,334,380	N/A	\$7,019,004	350,000

<sup>20</sup> "Average" refers to the average weighted spending per capita for each spending category.

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Events	Hotels	Transportation	Food and Beverage	Retail	Entertainment	Other	Total Spending	Total Attendance
2006 Fort Worth Arts Festival (TX)	\$665,047	\$2,181,367	\$901,356	\$139,391	\$45,995	\$109,991	\$4,043,147	198,811
<b>Average</b>	<b>\$11.10</b>	<b>\$7.19</b>	<b>\$12.63</b>	<b>\$25.31</b>	<b>\$2.02</b>	<b>\$18.91</b>		
<b>Food</b>								
2014 Brewers Fest (OR)	\$9,100,000	n/a	\$8,200,000	n/a	n/a	n/a	\$17,300,000	25,668
2007 Fiesta Oyster Bake (TX)	\$519,181	\$541,622	\$2,245,156	\$163,114	\$8,642	\$171,938	\$3,649,653	52,189
2005 Food Festivals (IA)	\$589,514	\$227,027	\$579,703	\$270,402	N/A	N/A	\$1,666,645	22,806
2003 Lodi Grape Festival & Harvest Fair (CA)	\$1,928,321	\$164,428	N/A	\$1,305,689	\$3,204,549	\$1,328,723	\$7,931,710	173,850
<b>Average</b>	<b>\$15.63</b>	<b>\$7.09</b>	<b>\$129.30</b>	<b>\$7.50</b>	<b>\$9.30</b>	<b>\$5.47</b>		
<b>Holiday</b>								
2012 Christmas Craft and Gift Show (PA)	\$104,912	\$107,571	\$197,532	\$205,636	n/a	\$8,837	\$624,488	24,710
2009 Lahaina Halloween Festival (HI)	\$855,258	n/a	\$283,419	\$398,411	n/a	n/a	\$1,537,088	5,264
2009 Riverfest (AR)	\$30,026,653	\$13,284,169	\$43,249,399	\$17,896,496	\$13,142,710	\$6,784,475	\$124,383,902	186,131
2007 Light in Winter Festival (NY)	\$26,055	\$12,711	\$18,564	\$38,319	\$6,384	N/A	\$102,033	3,000
<b>Average</b>	<b>\$84.18</b>	<b>\$2.86</b>	<b>\$75.10</b>	<b>\$48.23</b>	<b>\$1.06</b>	<b>\$0.18</b>		
<b>Performing Arts</b>								
2014 Sisters Folk Festival (OR)	\$211,000	\$118,000	\$351,000	\$121,000	\$414,000	N/A	\$1,215,000	3,676
2013 Bogalusa Blues & Heritage Festival (LA)	\$40,600	\$81,300	\$189,750	\$34,400	n/a	\$169,600	\$515,650	5,000
2012 Country Thunder music festival (WI)	\$1,029,718	\$1,824,674	\$2,289,572	\$571,649	n/a	n/a	\$5,715,613	30,879
2011 Electric Daisy Festival Las Vegas (NV)	\$1,000,232	\$542,726	\$865,634	\$371,754	\$477,949	\$400,075	\$3,658,370	12,000
<b>Average</b>	<b>\$45.55</b>	<b>\$38.17</b>	<b>\$69.93</b>	<b>\$22.32</b>	<b>\$76.23</b>	<b>\$33.63</b>		
<b>Other</b>								
2012 Baltimore Book Festival (MD)	\$211,200	\$201,800	\$572,800	\$220,800	\$95,900	N/A	\$1,302,500	47,000
2010 Four Corners Motorcycle Rally (CO)	\$509,220	\$485,100	\$996,480	\$559,980	\$350,460	N/A	\$2,901,240	18,000
2010 Philadelphia International Flower Show (PA)	\$2,929,687	\$1,401,099	\$6,374,807	N/A	N/A	\$8,092,861	\$18,798,454	231,924

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<b>Events</b>	<b>Hotels</b>	<b>Transportation</b>	<b>Food and Beverage</b>	<b>Retail</b>	<b>Entertainment</b>	<b>Other</b>	<b>Total Spending</b>	<b>Total Attendance</b>
2009 The Great New England Air Show (MA)	\$1,121,936	\$2,239,297	\$3,481,114	\$1,714,018	\$192,175	\$219,628	\$8,968,168	345,000
<b>Average</b>	<b>\$12.17</b>	<b>\$10.94</b>	<b>\$26.28</b>	<b>\$13.59</b>	<b>\$7.36</b>	<b>\$17.77</b>		

Sources: Various<sup>21</sup>

<sup>21</sup> For a full list of the references used, please refer to Section 6.0.

RESI determined fiscal impacts primarily based on district responses provided in the annual reports. The project team cross-referenced responses to questions regarding property tax credits in the annual reports with information available from the State Department of Assessment and Taxation (SDAT)’s online property database. The property that reported as applying for a property tax credit on the annual reports from FY 2014 did not receive the A&E tax credit per the project team’s research within SDAT’s database. RESI did not assume that all such applications were approved as this would likely overstate the impacts of property tax credits in the A&E districts, therefore understating the fiscal impacts.

**A.3 Modeling Assumptions**

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

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

**Figure 8: IMPLAN Industry Sectors**

<b>Input Category</b>	<b>IMPLAN Code</b>	<b>Description</b>
<b>Commercial Employment</b>		
	320	Retail stores—Motor vehicle and parts
	321	Retail stores—Furniture and home furnishings
	322	Retail stores—Electronics and appliances
	323	Retail stores—Building material and garden supplies
	324	Retail stores—Food and beverage
	325	Retail stores—Health and personal care
	327	Retail stores—Clothing and clothing accessories
	328	Retail stores—Sporting goods, hobby, book, and music stores
	330	Retail stores—Miscellaneous
	343	Book publishers
	346	Motion picture and video industries
	347	Sound recording industries
	354	Monetary authorities and depository credit intermediation activities
	358	Insurance agencies, brokerages, and related services
	359	Funds, trusts, and other financial vehicles
	360	Real estate establishments
	367	Legal services
	368	Accounting, tax preparation, bookkeeping, and payroll services
	369	Architectural, engineering, and related services
	370	Specialized design services
	374	Management, scientific, and technical consulting services
	375	Environmental and other technical consulting services
	377	Advertising and related services
	378	Photographic services
	379	Veterinary services

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

Source: IMPLAN

### A.4 Exclusions

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

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the analysis included the impacts of businesses falling under the latter case, the findings would likely be overstated.

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

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

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

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

#### **A.5 Limitations of the Data Provided**

A&E districts are expected to complete annual reports to provide information regarding goals, accomplishments, new establishments, events and promotions, attendance figures, and awards and grants for the fiscal year. These reports were provided by MSAC and cover FY 2014. All A&E districts submitted reports for this period.

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

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

## Appendix B—Glossary

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

**Figure 9: Glossary of Terms**

Term	Definition
Economic Impact	This term refers to the changes in the economy resulting from an event. RESI typically reports employment, state GDP/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 Impact	This term refers to the change in tax revenues resulting from an event. RESI typically reports state and local tax revenues, which are combined in IMPLAN.
IMPLAN	This term refers to the input/output modeling software used to model changes in the economy in a particular region. The user builds a model based on prepackaged economic data from IMPLAN (typically at the state or county level), then enters input figures—an industry change of employment or sales, a household change of income, and/or several other input types—for the industry sectors expected to be impacted as a “scenario.” IMPLAN runs the scenario created in the model and produces the economic and fiscal outputs.
New Businesses	This term refers to all of the businesses which were newly created within an A&E district during the study period according to data provided in the A&E district annual reports. These businesses may include both for-profit and nonprofit entities. The number of for-profit and nonprofit businesses cannot be precisely determined from the data provided.
Output	This term refers to the economic activity created as a result of 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 change in market value of all goods and services produced by the economy of the region which has been modeled in IMPLAN. It is synonymous with “output.”
Wage Impact	This term refers to the change in employee compensation (including all salaries and wages) associated with the job and state GDP/output creation resulting from district activity which has been modeled in IMPLAN.

Source: RESI

## Appendix C—MSAC Annual Report



**Arts & Entertainment Districts  
Annual Report**  
Fiscal Year (FY) 2014  
**DEADLINE:** September 30, 2014

**FOR THE PERIOD: JULY 1, 2013 - JUNE 30, 2014**

**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:	
<b>A&amp;E DISTRICT CONTACT PERSON</b>	<b>BOARD CHAIR/MANAGEMENT TEAM CHAIR</b>
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
---------------------	--------------	----------------

**Please answer all questions adhering to word limits.**

**SECTION I: DISTRICT ACCOMPLISHMENTS DURING FY 2014**

*In SECTION I, please identify only the new initiatives, events, festivals, projects, or enterprises during FY 2014.*

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 2014? If none use 0. If yes, list each separately. (500 words or less)
- C. How many new events occurred in the district during FY 2014? 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 2014? 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 2014? 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 2014? 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 2014? 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 2014? If none use 0. If yes, list each separately and indicate the number of full/part time jobs gained:

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- I. How many new restaurants opened in the district during FY 2014? If none use 0. If yes, list each separately and indicate the number of full/part time jobs gained:
- J. How many organizations newly located in the district during FY 2014? If none use 0. If yes, list each separately and indicate the number of full/part time jobs gained:

**SECTION II: CLOSINGS**

*In SECTION II, identify only the enterprises that closed during FY 2014.*

- A. How many retailers closed in the district during FY 2014? If none use 0. If yes, list each separately and indicate the number of full/part time jobs lost:
- B. How many businesses closed in the district during FY 2014? If none use 0. If yes, list each separately and indicate the number of full/part time jobs lost:
- C. How many restaurants closed in the district during FY 2014? If none use 0. If yes, list the name of each separately and indicate the number of full/part time jobs lost:
- D. How many organizations closed or locate outside the district during FY 2014? If none use 0. If yes, list each separately and indicate the number of full/part time jobs lost:

**SECTION III: FY 2013 CHALLENGES/SUCSESSES**

- A. Describe any challenges or issues encountered in the past year. Include the following if applicable: Technology, Administrative, Funding, and/or Other. Indicate if resolved or not. (500 words or less)
- B. Describe any successes or innovations that took place during FY2014. Include the following if applicable: Technology, Administrative, Funding, and/or Other. (500 word or less)

**SECTION IV: DISTRICT EVENTS AND FESTIVALS during FY2014 – LIST ALL THAT OCCURRED**

- A. Names of Events** **Date/s** **Total Estimated Attendance**

*(Events that are presented by organizations or enterprises other than the management of the A&E district should also be included but it must be a public event. For example, ABC Arts Organization holds a Halloween Lantern Parade that takes place in the district.)*

- B. Names of Festivals** **Date/s** **Total Estimated Attendance**

*(Festivals that are presented by organizations or enterprises other than the management of the A&E district should also be included but it must be a public festival. For example, ABC Community Organization holds a holiday festival of trees that takes place in the district.)*

**SECTION V: 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.*

<b>Type of Enterprise</b>	<b>Names</b>	<b>Total Annual Attendance of Each</b>
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:*

<b>Name</b>	<b>Number of Units</b>	<b>Developer</b>
-------------	------------------------	------------------

**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 2014:

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 2014?

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

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- 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 2014 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 2014?

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 2014:

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	\$ _____

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**B.** If a Maryland State Arts Council grant was awarded to the A&E District during FY 2014 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 2014:

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 2014.

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

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- 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 2014 (JULY 1, 2014 – JUNE 30, 2014) GOALS AND WORK PLAN**

- A. Identify your district’s FY 2014 goals. (500 words or less)
- B. Summarize your district’s FY 2014 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

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verifies that the applicant agrees to complete and submit this report by electronic means, including the use of an electronic signature.

## Appendix D—A&E District Websites

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

**Figure 10: A&E District Websites**

District	County	Website
Annapolis	Anne Arundel	<a href="http://www.annapolisarts.org/">http://www.annapolisarts.org/</a>
Bel Air	Harford	<a href="http://www.belairartsandentertainment.org/">http://www.belairartsandentertainment.org/</a>
Berlin	Worcester	<a href="http://www.berlinmainstreet.com/">http://www.berlinmainstreet.com/</a>
Bethesda	Montgomery	<a href="http://www.bethesda.org/">http://www.bethesda.org/</a>
Bromo Tower	Baltimore City	<a href="http://www.bromoseltzertower.com/">http://www.bromoseltzertower.com/</a>
Cambridge	Dorchester	<a href="http://www.cambridgemainstreet.com/">http://www.cambridgemainstreet.com/</a>
Cumberland	Allegany	<a href="http://www.alleganyartscouncil.org/static.php?page=208">http://www.alleganyartscouncil.org/static.php?page=208</a>
Denton	Caroline	<a href="http://www.downtowndenton.com/ae.html">http://www.downtowndenton.com/ae.html</a>
Elkton	Cecil	<a href="http://www.elktonalliance.org/arts/index.asp">http://www.elktonalliance.org/arts/index.asp</a>
Frederick	Frederick	<a href="http://www.downtownfrederick.org/">http://www.downtownfrederick.org/</a>
Frostburg	Allegany	<a href="http://www.alleganyartscouncil.org/static.php?page=210">http://www.alleganyartscouncil.org/static.php?page=210</a>
Gateway	Prince George's	<a href="http://mygatewayarts.org/">http://mygatewayarts.org/</a>
Hagerstown	Washington	<a href="http://www.washingtoncountyarts.com/">http://www.washingtoncountyarts.com/</a>
Havre de Grace	Harford	<a href="http://www.havredegracearts.org/">http://www.havredegracearts.org/</a>
Highlandtown	Baltimore City	<a href="http://www.highlandtownarts.com/">http://www.highlandtownarts.com/</a>
Leonardtwn	St. Mary's	<a href="http://www.stmarysartscouncil.com/arts--entertainment-district.html">http://www.stmarysartscouncil.com/arts--entertainment-district.html</a>
Salisbury	Wicomico	<a href="http://moonshell.net/salisburyaed/">http://moonshell.net/salisburyaed/</a>
Silver Spring	Montgomery	<a href="http://silverspringdowntown.com/">http://silverspringdowntown.com/</a>
Snow Hill	Worcester	<a href="http://www.snowhillmd.com/liveHere/maps.cfm">http://www.snowhillmd.com/liveHere/maps.cfm</a>
Station North	Baltimore City	<a href="http://www.stationnorth.org/">http://www.stationnorth.org/</a>
Stevensville	Queen Anne's	<a href="http://stevensvilleartsandentertainment.org/">http://stevensvilleartsandentertainment.org/</a>
Wheaton	Montgomery	<a href="http://www.wheatonmd.org/">http://www.wheatonmd.org/</a>

Source: MSAC

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