

COVID-19 Impacts on Maryland's Arts + Culture Sector



maryland citizens for the arts

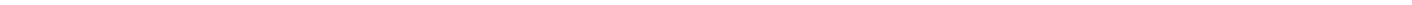
Full Study with Supporting Data
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Authored by:
Surale Phillips & Steven R. Nivin, Ph.D.



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Executive Summary

The arts are an integral part of the culture of most communities, and as such, they provide many social benefits. The arts enhance our quality of life, lead to improved educational outcomes for students engaged in various forms of arts education, provide a forum for expression and heighten our awareness of issues, among other benefits. While these social benefits also yield positive economic impacts, arts organizations and artists also provide direct positive impacts on the economies in which they operate. The arts provide important goods and services that are inputs to every industry in an economy, increase workers' productivity, encourage entrepreneurial activity, and as public goods play a role in the attraction and retention of firms and workers. These arts contributions are elements of what Markusen and King term "the artistic dividend," meaning "the aggregate economic impact that would not occur without the presence of artists."¹ Additionally, the arts impact the economies in which they function in the more standard ways of other industries by providing employment and incomes to workers, attracting visitors, and creating their own final output through the production of their own products.

All of these impacts are important contributions to a community and its local economy, but the analysis in this report focuses on measuring the latter impacts – the standard industry impacts. Specifically, the analysis measures the economic and fiscal impacts of those arts organizations that have received funding from The Maryland State Arts Council in FY2019 and FY2020 through the Organizational Grants Program.

The Story Behind the Numbers

The Maryland State Arts Council (MSAC) regularly sponsors Creative Conversations, a series of discipline-specific gatherings with arts leaders across the state such as Maryland Citizens for the Arts (MCA), Maryland Nonprofits, Volunteer Lawyers for the Arts, and the Maryland State Department of Education. Responding to the Coronavirus state of emergency last April, these gatherings expanded beyond discipline groups to include arts and culture sector cohorts and themes such as boards of directors, county arts agencies, public art professionals, arts and entertainment districts, and accessibility for people with special needs. These state discussions convened more than 500 people, providing an opportunity for MSAC and MCA to offer COVID-19 related updates, facilitate peer-to-peer sharing, encourage fresh recommendations from constituents, and envision the resurgence of arts activities.

This narrative provides a context for the numbers presented in this report and describes the activities, concerns, and opportunities discussed during the meetings. This summary is built from transcripts, notes, and other documentation of the Creative Conversations.

¹ Anne Markusen and David King. P. 4. "The Artistic Dividend: The Arts' Hidden Contributions to Regional Development." (July 2013).





Pivoting

As early as April 2020, arts organizations began shifting their rehearsals, educational programs, tours, exhibitions, summer camps, fundraising events, and performances to a variety of online platforms. They also moved activities to temporary outdoor venues as was possible. Many organizations struggled to adapt to unfamiliar technology, create new content, and absorb the added costs of this pivot while maintaining staff and board morale, identifying partners to help in the transition, and communicating changes to audiences, funders, and other stakeholders.

Maintaining high quality and accessible programming while moving to online platforms and outdoor activities remained a major focus of these discussions, as was the issue of how to monetize and manage digital programming while competing with overabundant free online arts and entertainment options.

Performance, tour, conference, and exhibition cancellations and postponements dominated activity during an uncertain time with an uncertain future. Organizations halted planned renovations, delayed capital campaigns, canceled contracts, and laid off or furloughed staff. New conversations about the viability of the nonprofit model were held amid applying for PPP and CARES Act funding, launching podcasts, producing videos, organizing social media campaigns, sharing resource information, creating in-home educational programs for students and teachers, and providing food resources to their artists and participants.

Americans for the Arts reports that 60% of arts and cultural organizations in Maryland alone are experiencing very or extremely severe economic impacts due to COVID-19. Lost attendance in the state is reported to be above 2.5 million, with 96% of organizations reporting canceled events. At 2020's end, 13% of organizations reported they are not confident they will survive. Nationally, artists and creative workers are also severely affected by the pandemic, with 95% reporting income loss and 63% now fully unemployed.

In addition to experiencing extreme financial hardship, artists and creative workers in Maryland struggled with their creative practice in many different ways, from finding inspiration to learning to rehearse, teach, perform, exhibit, and share work online. These artists now feel added pressure to provide healing to others while coping with their own trauma, as the arts are now being referred to as "second responders" to emotionally and spiritually heal the state and our nation. Grantmaking organizations also redirected their normal operations to raise relief funds, repurpose program support to general operating support, and create funding mechanisms for independent artists. Some organizations launched massive fundraising campaigns, while others took this time to revisit their mission priorities. Some theater and presenting organizations shifted a curatorial eye to "lower risk, staple" programming, while others focused on managing internal discord and maintaining strong donor relationships.

While organizations' most urgent need will remain emergency financial relief and funding to maintain budgets throughout the pandemic and post-COVID-19, some expressed future concerns and highlighted unforeseen opportunities listed here:





Snapshot of Future Concerns

- Long-term restrictions on audience size
- Ability to return to schools, nursing homes, and other congregant settings
- Loss of arts opportunities for people with disabilities
- Limitations on hands-on creative activities
- Union negotiations
- Issues of intellectual property and royalties
- Contracting with international artists (and other travel restrictions)
- Rising costs leading to exclusivity
- Loans creating more debt
- Content development for teachers

Snapshot of Unforeseen Opportunities

- Increased and new audiences for virtual experiences
- Organizational mergers and strategic collaborations
- Demystification of the arts for parents witnessing student education at home
- Collaborations for STEM and the Arts in technology
- Advancing and reimagining public art projects
- Statewide showcasing of artists and their COVID-19 creativity (e.g. submissions)
- Increased focus on social justice within the arts
- Arts as essential campaigns (e.g. The Arts Are Second Responders)
- 21st Century Federal WPA program for artists
- Maryland statewide "Community Recovery Public Art Programs"

Recommendations from Maryland Constituents

- Provide funding to maintain budgets
- Strengthen grassroots advocacy for relief
- Publish and disseminate timely and transparent information for planning and budgeting
- Offer simple guides to available aid and relief programs
- Reassign county summer event funding to emergency relief
- Create unified and ongoing marketing and messaging
- Provide clear policies regarding facility and production safety and responsible citizenry
- Expand grants for artists and creative workers
- Provide resources for virtual programming
- Offer options and resources for temporary venues
- Host workshops on managing finances and pandemic resources
- Advocate for licensing and special provisions for broadcasting
- Facilitate community partnerships
- Increase the number of facilitated listening sessions and peer sharing opportunities
- Provide resources and opportunities to evaluate audiences



MSAC and MCA have already responded to many of these concerns and recommendations, mobilizing resources and partners to address solutions. Some examples include:

- Creative Resurgence: A Vision For the Future of the Arts in Maryland, a week-long virtual summit (May 2020)
- Weekly Regional Arts Summits (September and October 2020)
- Publication of COVID-10 Artist Emergency Resources
- The Future of Maryland's Arts Sector: Strategies for Stability and Sustainability (Arts Leadership), and The Future of Maryland's Arts Sector: Best Practices for Digital Arts Engagement, and continued Creative Conversations

The Arts Council provided funding to 220 organizations in 2019 and 203 organizations in 2020. As shown in Table 1, these organizations employed 51,199 workers (includes part-time and full-time staff and artists). Employment among the organizations that received funding declined 39% to 31,106 in 2020 due to the effects of the pandemic. The level of employment by the main discipline of the organizations is also provided in the table. Music organizations employed the largest number of workers followed by visual arts and multi-discipline organizations. However, in 2020, multi-discipline organizations employed the largest number of workers by a substantial number of workers compared to music organizations that had the second-highest level of employment.

Table 1. Employment by Organization Discipline

Discipline	2019	2020	Y/Y % Change
Dance	3,770	306	-92%
Folk & Traditional Arts	4,559	1,152	-75%
Literary Arts	2,727	75	-97%
Multi-Discipline	11,204	17,130	53%
Music	12,052	5,733	-52%
Theater	5,642	3,575	-37%
Visual Arts	11,245	3,136	-72%
Total	51,199	31,106	-39%

These organizations had total income of \$285.3 million in 2019, but total income declined by 7% in 2020 to \$264.6 million (see Table 2). Among the seven disciplines, there is a clear dichotomy in the level of income with the multi-discipline, music, theater, and visual arts organizations having much larger incomes than the dance, folk and traditional arts, and literary arts organizations.



Table 2. Total Income of Arts Organizations by Discipline

Discipline	2019	2020	Y/Y % Change
Dance	\$6,298,731	\$5,720,510	-9%
Folk & Traditional Arts	\$13,110,547	\$9,384,747	-28%
Literary Arts	\$1,336,470	\$1,159,915	-13%
Multi-Discipline	\$74,210,578	\$52,635,408	-29%
Music	\$76,407,910	\$89,851,524	18%
Theater	\$50,181,600	\$46,178,023	-8%
Visual Arts	\$63,715,531	\$59,710,609	-6%
Grand Total	\$285,261,366	\$264,640,735	-7%

Many of these organizations attract visitors from outside the state to attend their events. The spending of these visitors adds to the economic impacts of these organizations. More specifically, it is the spending of those visitors who came from outside Maryland and whose main purpose for making the trip was to attend one of these arts organization's events that counts toward the economic impacts of the events. In 2019, the organizations had total attendance, including both in-state residents and visitors, of 15.9 million people, but with the effects of the pandemic, attendance declined 65% to 5.5 million in 2020, as shown in Table 3. When these attendance figures are adjusted for visitors from out-of-state whose main purpose for coming to the state was to attend an event at one of the arts organizations, these organizations attracted over two million of these visitors in 2019 and over 700 thousand visitors in 2020 (see Table 4). As expected, total spending by these visitors also fell substantially from \$83.1 million in 2019 to \$29.1 million in 2020 (see Table 5). The multi-discipline organizations attracted the most visitors and spending activity followed by the visual arts, folk and traditional arts, music, and theater organizations.

Table 3. Total Attendance by Organization Discipline

Discipline	2019	2020	% Change
Dance	145,057	107,703	-26%
Folk & Traditional Arts	3,563,335	971,217	-73%
Literary Arts	80,881	7,534	-91%
Multi-Discipline	6,829,800	2,097,981	-69%
Music	2,008,061	454,615	-77%
Theater	754,724	509,027	-33%
Visual Arts	2,475,245	1,396,373	-44%
Grand Total	15,857,103	5,544,450	-65%



Table 4. Total Number of Visitors Whose Spending Counts toward Economic Impacts by Organization Discipline

Discipline	2019	2020	% Change
Dance	18,333	13,612	-26%
Folk & Traditional Arts	450,359	122,749	-73%
Literary Arts	10,222	952	-91%
Multi-Discipline	863,198	265,158	-69%
Music	253,793	57,457	-77%
Theater	95,387	64,334	-33%
Visual Arts	312,839	176,483	-44%
Grand Total	2,004,132	700,746	-65%

Table 5. Total Visitor Spending by Organization Discipline

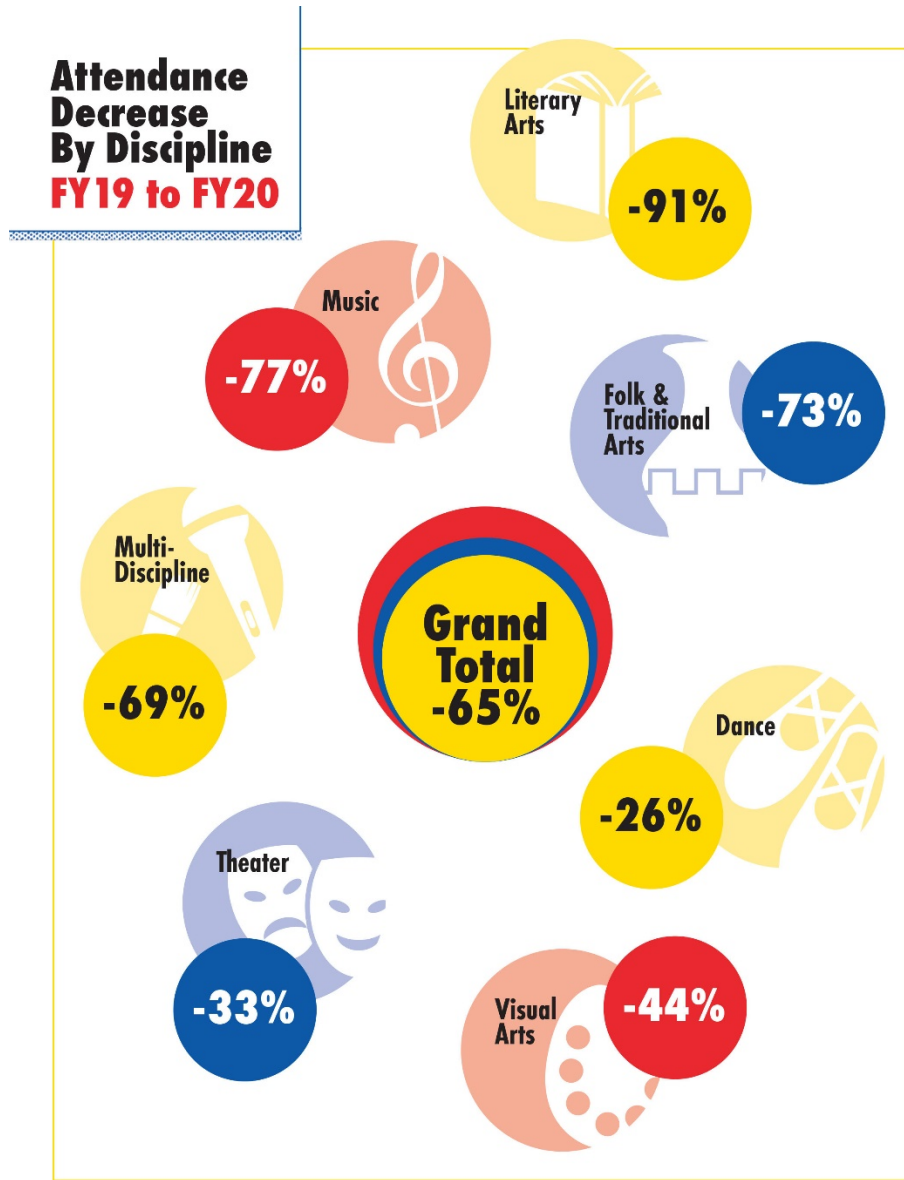
Organization Discipline	2019	2020	Y/Y % Change
Dance	\$760,283	\$564,500	-26%
Folk & Traditional Arts	\$18,676,397	\$5,090,409	-73%
Literary Arts	\$423,919	\$39,488	-91%
Multi-Discipline	\$35,796,818	\$10,996,083	-69%
Music	\$10,524,788	\$2,382,759	-77%
Theater	\$3,955,711	\$2,667,947	-33%
Visual Arts	\$12,973,425	\$7,318,766	-44%
Grand Total	\$83,111,341	\$29,059,953	-65%

A summary of the economic impacts of these arts organizations on the state economy of Maryland is shown in Table 6, and the more detailed results are provided in Appendices A and B. The impacts include the multiplier effects.² The operations of the arts organizations supported employment of 53,251 workers in 2019 with a decline in their impacts on employment of 38% to 32,960 workers in 2020. The overall economic impacts in 2019 as measured by gross domestic product (GDP) and output were \$312.4 million and \$560.5 million, respectively. As expected, due to the economic effects of the pandemic, the impact on the state's GDP declined by 8% to \$287.4 million, and output declined 9% to \$511.2 million in 2020.

² The multiplier effects are comprised of two components. The induced effects are derived from the spending by the workers at the arts organizations and the spending by the workers at the businesses where the arts organizations workers consume goods and services and so on. The indirect effects are caused by the spending of the arts organizations with their suppliers and the spending of these suppliers with their suppliers. The multiplier effects are discussed in more detail in the methodology section.



The decline in the number of visitors who traveled to the state to attend an event of one the arts organizations lead to a 66% decline in the economic impacts of their spending.³ Employment supported by this economic activity declined from 1,401 jobs to 481 jobs. The contribution to the GDP of the state's economy also decreased from \$79.2 million to \$27.2 million from 2019 to 2020, and output declined from \$131.6 million to \$45.2 million.



³ Data on the spending of the visitors was not directly available from the arts organizations. In order to calculate the number of visitors whose spending count toward the economic impacts, data on the percentage of visitors from outside Maryland and visitors whose main purpose for traveling to the state was to attend an arts event, as well as spending data by type of spending, was pulled from the *Arts and Economic Prosperity 5* report published by the Americans for Arts. The data from this report are only for 2016, and it was assumed in this analysis that the figures were the same for both 2019 and 2020. This results in the change in the visitor spending economic impacts all being 66%.



The combined economic impacts of the arts organizations derived from their operations and the spending of the visitors they attract supported employment of 54,652 workers in 2019. This economic activity contributed \$391.5 million to GDP and \$692.1 million to output across the state economy. In 2020, employment supported by the activities of the arts organizations declined by 39% to 33,441 workers. The impact on GDP and output each fell by 20% to \$314.6 million and \$556.4 million, respectively, in 2020.

Table 6. Economic Impacts of All Arts Organizations: 2019-2020

	Employment	GDP (2020 \$)	Output (2020 \$)
Operations			
2019	53,251	\$312,357,287	\$560,482,082
2020	32,960	\$287,403,586	\$511,179,722
Y/Y Change	-38%	-8%	-9%
Visitor Spending			
2019	1,401	\$79,176,411	\$131,625,897
2020	481	\$27,193,829	\$45,202,867
Y/Y Change	-66%	-66%	-66%
Total			
2019	54,652	\$391,533,698	\$692,107,979
2020	33,441	\$314,597,416	\$556,382,589
Y/Y Change	-39%	-20%	-20%

The dwindling in economic activity caused by the pandemic also led to a decline in revenues to various government agencies. The revenues shown in Table 7 include revenues generated by the spending activity of the induced and indirect multiplier effects. The fact that the arts organizations are nonprofits and do not pay certain taxes is accounted for in these figures. In other words, the operations of for-profit organizations result in tax revenues to the various government agencies, called direct revenues, but since the arts organizations are nonprofits, direct revenues are not included in the figures in Table 7. However, direct revenues, as well as revenues generated by the multiplier effects, generated by the visitor spending are included due to the nature of that spending. In 2019, the operations of the arts organizations generated about \$35.8 million in revenues, and the economic activity of the visitors resulted in \$20.3 million flowing to the various government agencies. In total, government revenues amounted to \$56.1 million. As expected with the decline in economic activity in 2020, the revenues from the operations of visitor spending also declined. Government revenues derived from the operations of the arts organizations and the spending of the visitors they attracted were \$32.5 million and almost \$7 million, respectively. In total, government revenues fell to \$39.5 million in 2020.



Table 7. Government Revenues Generated by All Arts Organizations

	2019		
	Operations	Visitor Spending	Total
Sub County General	\$995,977	\$702,098	\$1,698,075
Sub County Special Districts	\$2,337	\$1,710	\$4,047
County	\$6,032,611	\$4,075,195	\$10,107,806
State	\$8,573,326	\$5,478,762	\$14,052,088
Federal	\$20,182,545	\$10,036,940	\$30,219,485
Total	\$35,786,796	\$20,294,705	\$56,081,501

	2020		
	Operations	Visitor Spending	Total
Sub County General	\$905,529	\$241,295	\$1,146,824
Sub County Special Districts	\$2,125	\$588	\$2,712
County	\$5,484,668	\$1,400,480	\$6,885,148
State	\$7,795,624	\$1,882,686	\$9,678,310
Federal	\$18,307,596	\$3,447,241	\$21,754,838
Total	\$32,495,541	\$6,972,291	\$39,467,832

NOTE:

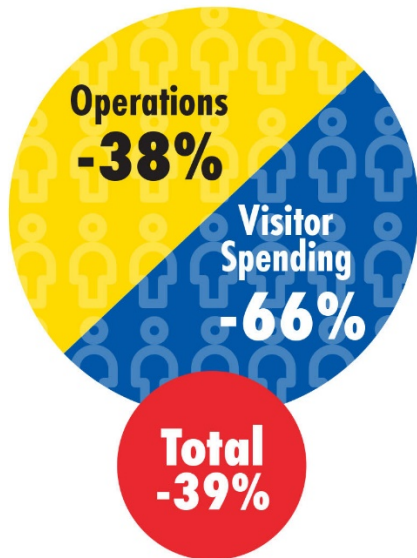
Sub County General includes revenues collected by city, township, village, or similar governments within the state.

Sub County Special Districts include revenues collected by school districts, fire districts, hospital districts, and other similar districts within the state.



Economic Impacts of All Arts Organizations FY19 to FY20

Employment



Output



Economic Change

Operations	-\$49,302,360
Visitor Spending	-\$86,423,030
Total	-\$135,725,390



Methodology

Economic Impact Concepts

Economic impact is based on the concept that a new dollar flowing into the area causes an expansion of the economy. The economic activity of many businesses generates exports outside of the region,⁴ which brings this money flowing back into the local economy. These businesses use this revenue to pay their workers' salaries and benefits, purchase inputs from local suppliers, and pay government taxes and fees. The direct economic impact is derived from the production activity of the businesses and the salaries and benefits they are then able to pay their workers. As already alluded to, this also generates additional economic activity oftentimes referred to as the multiplier effects.

The multiplier can be separated into two effects: the indirect effect and the induced effect. The indirect effect results from the company purchasing inputs (physical goods or services) from its local suppliers. This then sets off additional spending by the supplier in its purchases of inputs and payment of salaries and benefits to its employees. The induced effect is derived from the spending of the employees of the company resulting from the incomes they receive. This is where the economic impact really begins to spread throughout the economy as workers spend their incomes to buy the various goods and services that they need and desire.


All of this economic activity also benefits the government at various levels as the spending by businesses, their employees, and others generate tax revenues and fees. For instance, these activities will generate excise, income, and property tax revenues, social security contributions, and various license fees.

Of course, not all of this economic activity is captured within the local economy. There are leakages as businesses and individual consumers purchase goods and services outside of the local economy causing some money to leak or flow out of the local economy. This is also the case as federal and state taxes and fees are paid resulting from these activities. These leakages are accounted for in the model and are not counted as part of the economic impact. In fact, they reduce the impact of these activities.

There are generally three basic multipliers used to measure the overall impacts. The output multiplier measures the direct, indirect, and induced changes in output across the economy resulting from a change in economic activity within the local economy. The employment multiplier measures the direct, indirect, and induced changes in full-time equivalent employment across the economy resulting from this change in economic activity. Finally, the earnings multiplier measures the direct, indirect, and induced changes in earnings (including benefits) across the economy resulting from the change in economic activity. Like the proverbial ripples resulting from a rock being thrown in a pond, the multiplier effects will register successive rounds of effects until eventually the leakage from each round halts the process.

⁴ These exports include retail and hotel spending, for example, by visitors from outside the county. In this manner, many services are also exported.





Input-output analysis was introduced by Wassily Leontief for which he later received the Nobel Prize in economics in 1973.⁵ An input-output model describes the economic interactions or trade flows among businesses, households, and governments and shows how changes in one area of the economy impact other areas. The multipliers that result from these models are the expressions of these interactions. The analysis is conducted using the IMPLAN input-output model for these two geographies. The IMPLAN model measures the economic interactions across 536 industries.

The economic activity accounted for in the analysis is the spending from the visitors who attended the events and the operations of the arts organizations. The actual data used and the methodologies to derive the spending estimates are discussed in the following section.

Data

Data on each organization that received grant funds for fiscal years 2019 and 2020 were provided by the Maryland Citizens for the Arts. The data on each of the organizations used in this analysis included the number of full-time and part-time staff and artists employed by the arts organizations, total income, and total in-person attendance. Additional data from Americans for the Arts was also used in the calculations of the impacts of visitor spending, as discussed below.

Impacts of Visitor Spending

The total attendance for 2019 and 2020 by discipline of the arts organizations is shown in Table 3. In both 2019 and 2020, only those who attended in-person were included in the total attendance figures. Those who attended virtually were not included because even if they did engage in spending related to their attendance at the event, they would have either been a resident of Maryland or if they were from outside Maryland, their spending would have been at their location of residence and would not count toward the economic impacts in Maryland. To the extent that any of the spending related to this arts event by these virtual attendees from out-of-state would have flowed to the arts organization or another business in Maryland (e.g., they purchase a shirt made for the event), the spending amounts will be conservative.

In order to calculate the number of attendees at the events whose spending counted toward the economic impacts, the total attendance figures were adjusted to account for those who came from outside the state for the main purpose of attending the arts event. These calculations were made using data for the state of Maryland from the *Arts & Economic Prosperity 5* study published by Americans for the Arts.⁶ Specifically, the results of the study indicate that in 2016 15.1% of attendees came from outside the state to attend arts events and for 83.7% of those in attendance, the arts event was their primary reason for traveling to the state. These figures were multiplied by the total attendance for each discipline shown in Table 3 to get an estimate of the attendees whose spending count towards the economic impacts as shown in Table 4.

⁵ For an example of his seminal work, see: Leontief, Wassily et al., *Studies in the Structure of the American Economy: Theoretical and Empirical Explorations in Input-Output Analysis*, New York: Oxford University Press, 1953.

⁶ Americans for the Arts. (n.d.) *Arts and Economic Prosperity 5*.

https://www.americansforthearts.org/sites/default/files/aep5/PDF_Files/NationalFindings_StatisticalReport.pdf



The spending amounts of these visitors was calculated using the average per person spending by non-resident attendees at arts events in Maryland in 2016 from the *Arts and Economic Prosperity V* report.⁷ The average amounts by type of spending are provided in Table 8. These figures were used to calculate spending for both 2019 and 2020, so since these are not adjusted for inflation, they are somewhat conservative. These spending amounts were multiplied by the total number of attendees whose spending counts toward economic impacts from Table 4 to get the total amount of spending as shown in Tables 9 and 10. These total spending figures were then run through the IMPLAN input-output model for the state of Maryland to get the economic and fiscal impacts, including multiplier effects. The detailed results are provided in Appendices A and B.

Table 8. Average Per Person Audience Spending by Non-Resident Attendees at Arts Events in Maryland in 2016

Type of Spending	Amount
Refreshments and/or snacks	\$5.07
Meals/drinks	\$16.67
Retail/gifts and souvenirs	\$4.73
Clothing and accessories	\$1.32
Local transportation	\$4.62
Child care	\$0.95
Overnight lodging	\$7.66
Other/misc.	\$0.45

Source: Americans for the Arts - *Arts & Economic Prosperity V*

Table 9. Visitor Spending by Discipline of Organization and Type of Spending: 2019

Type of Spending	Folk &			
	Dance	Traditional Arts	Literary Arts	Multi-Discipline
Refreshments and/or snacks	\$92,950	\$2,283,321	\$51,827	\$4,376,414
Meals/drinks	\$305,616	\$7,507,488	\$170,406	\$14,389,510
Retail/gifts and souvenirs	\$86,717	\$2,130,199	\$48,352	\$4,082,926
Clothing and accessories	\$24,200	\$594,474	\$13,493	\$1,139,421
Local transportation	\$84,700	\$2,080,660	\$47,227	\$3,987,974
Child care	\$17,417	\$427,841	\$9,711	\$820,038
Overnight lodging	\$140,433	\$3,449,752	\$78,303	\$6,612,096
Other/misc.	\$8,250	\$202,662	\$4,600	\$388,439
Total	\$760,283	\$18,676,397	\$423,919	\$35,796,818

⁷ ibid


Type of Spending	Music	Theater	Visual Arts	Grand Total
Refreshments and/or snacks	\$1,286,730	\$483,614	\$1,586,093	\$10,160,948
Meals/drinks	\$4,230,726	\$1,590,106	\$5,215,023	\$33,408,875
Retail/gifts and souvenirs	\$1,200,440	\$451,182	\$1,479,727	\$9,479,543
Clothing and accessories	\$335,007	\$125,911	\$412,947	\$2,645,454
Local transportation	\$1,172,523	\$440,689	\$1,445,315	\$9,259,088
Child care	\$241,103	\$90,618	\$297,197	\$1,903,925
Overnight lodging	\$1,944,053	\$730,667	\$2,396,345	\$15,351,649
Other/misc.	\$114,207	\$42,924	\$140,777	\$901,859
Total	\$10,524,788	\$3,955,711	\$12,973,425	\$83,111,341

Table 10. Visitor Spending by Discipline of Organization and Type of Spending: 2020

Type of Spending	Folk &			
	Dance	Traditional Arts	Literary Arts	Multi-Discipline
Refreshments and/or snacks	\$69,014	\$622,338	\$4,828	\$1,344,349
Meals/drinks	\$226,916	\$2,046,229	\$15,873	\$4,420,176
Retail/gifts and souvenirs	\$64,386	\$580,604	\$4,504	\$1,254,195
Clothing and accessories	\$17,968	\$162,029	\$1,257	\$350,008
Local transportation	\$62,889	\$567,101	\$4,399	\$1,225,028
Child care	\$12,932	\$116,612	\$905	\$251,900
Overnight lodging	\$104,270	\$940,259	\$7,294	\$2,031,107
Other/misc.	\$6,126	\$55,237	\$428	\$119,321
Total	\$564,500	\$5,090,409	\$39,488	\$10,996,083

Type of Spending	Music	Theater	Visual Arts	Grand Total
Refreshments and/or snacks	\$291,309	\$326,175	\$894,771	\$3,552,784
Meals/drinks	\$957,815	\$1,072,454	\$2,941,978	\$11,681,443
Retail/gifts and souvenirs	\$271,774	\$304,302	\$834,766	\$3,314,530
Clothing and accessories	\$75,844	\$84,921	\$232,958	\$924,985
Local transportation	\$265,453	\$297,225	\$815,353	\$3,237,448
Child care	\$54,585	\$61,118	\$167,659	\$665,709
Overnight lodging	\$440,124	\$492,801	\$1,351,863	\$5,367,717
Other/misc.	\$25,856	\$28,950	\$79,418	\$315,336
Total	\$2,382,759	\$2,667,947	\$7,318,766	\$29,059,953





Impacts of Operations of Arts Organizations

The IMPLAN input-output model for the state of Maryland was used to calculate the economic and fiscal impacts of the operations on the arts organizations. Using the categorization of the disciplines of each organization provided by Maryland Citizens for the Arts, the employment (including full-time and part-time staff and artists) and total income of the organizations was aggregated by discipline. The total employment and total income figures were used as inputs into the model as industry events

Since the arts organizations are nonprofits, two adjustments were made to the economic and fiscal impact outputs from the model. One, the direct taxes on production and income and the direct taxes on enterprises at the state and local and federal government levels were summed and then subtracted from the direct gross domestic product (GDP) and output impacts. Two, the model automatically calculates the direct tax payments as if the organizations were for-profit entities, but since they are nonprofits, the direct tax payments were removed from the fiscal impact results. In other words, only the tax revenues generated by the induced and indirect economic activity generated by the operations of the arts organizations was included in the fiscal impacts of the operations. This is different from the fiscal impacts of the visitor spending, which do include the government revenues generated by the direct economic activity. The direct spending by the visitors is conducted with for-profit organizations as can be seen by the type of spending shown in Tables 8-10, so this activity will generate revenues to the various government agencies.



Appendix A: Detailed Economic Impacts by Discipline: 2019

Table A1. Economic Impacts of the Operations of All Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	51,199	\$112,739,226	\$146,419,433	\$280,339,092
Indirect	1,286	\$62,648,897	\$87,515,360	\$153,925,314
Induced	766	\$42,528,707	\$78,434,688	\$126,229,871
Total	53,251	\$217,916,831	\$312,369,481	\$560,494,277

Table A2. Economic Impacts of Spending by Visitors to All Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	1,088	\$30,053,462	\$46,297,899	\$76,281,889
Indirect	144	\$10,107,382	\$15,528,105	\$27,429,852
Induced	169	\$9,384,861	\$17,350,407	\$27,914,156
Total	1,401	\$49,545,705	\$79,176,411	\$131,625,897

Table A3. Grand Total of Economic Impacts of All Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	52,287	\$142,792,688	\$192,717,332	\$356,620,981
Indirect	1,429	\$72,756,278	\$103,043,465	\$181,355,166
Induced	935	\$51,913,569	\$95,785,096	\$154,144,026
Total	54,652	\$267,462,535	\$391,545,893	\$692,120,173

Table A4. Economic Impacts of the Operations of Dance Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	3,770	\$2,566,052	\$3,453,254	\$6,193,823
Indirect	27	\$1,309,755	\$1,779,493	\$2,946,493
Induced	17	\$946,441	\$1,744,575	\$2,807,850
Total	3,815	\$4,822,247	\$6,977,323	\$11,948,166



Table A5. Economic Impacts of Spending by Visitors to Dance Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	10	\$274,922	\$423,522	\$697,809
Indirect	1	\$92,460	\$142,047	\$250,922
Induced	2	\$85,850	\$158,717	\$255,352
Total	13	\$453,232	\$724,287	\$1,204,082

Table A6. Grand Total of Economic Impacts of Dance Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	3,780	\$2,840,974	\$3,876,776	\$6,891,632
Indirect	29	\$1,402,215	\$1,921,541	\$3,197,415
Induced	19	\$1,032,291	\$1,903,292	\$3,063,202
Total	3,827	\$5,275,480	\$7,701,610	\$13,152,248

Table A7. Economic Impacts of the Operations of Folk & Traditional Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	4,559	\$10,550,444	\$10,954,512	\$12,803,225
Indirect	15	\$801,590	\$1,116,780	\$2,007,011
Induced	52	\$2,903,179	\$5,330,936	\$8,584,363
Total	4,626	\$14,255,213	\$17,402,229	\$23,394,599

Table A8. Economic Impacts of Spending by Visitors to Folk & Traditional Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	245	\$6,753,475	\$10,403,850	\$17,141,714
Indirect	32	\$2,271,284	\$3,489,404	\$6,163,910
Induced	38	\$2,108,923	\$3,898,903	\$6,272,740
Total	315	\$11,133,682	\$17,792,158	\$29,578,364

Table A9. Grand Total of Economic Impacts of Folk & Traditional Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	4,804	\$17,303,919	\$21,358,363	\$29,944,939
Indirect	47	\$3,072,874	\$4,606,184	\$8,170,921
Induced	90	\$5,012,102	\$9,229,840	\$14,857,103
Total	4,941	\$25,388,895	\$35,194,387	\$52,972,963



Table A10. Economic Impacts of the Operations of Literary Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	2,727	\$1,075,497	\$1,128,881	\$1,317,337
Indirect	2	\$81,713	\$113,843	\$204,592
Induced	5	\$295,946	\$543,428	\$875,077
Total	2,734	\$1,453,156	\$1,786,152	\$2,397,006

Table A11. Economic Impacts of Spending by Visitors to Literary Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	6	\$153,291	\$236,148	\$389,084
Indirect	1	\$51,554	\$79,203	\$139,909
Induced	1	\$47,869	\$88,498	\$142,379
Total	7	\$252,713	\$403,848	\$671,373

Table A12. Grand Total of Economic Impacts of Literary Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	2,733	\$1,228,788	\$1,365,029	\$1,706,421
Indirect	2	\$133,267	\$193,046	\$344,501
Induced	6	\$343,814	\$631,926	\$1,017,457
Total	2,741	\$1,705,869	\$2,190,001	\$3,068,379

Table A13. Economic Impacts of the Operations of Multi-Discipline Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	11,204	\$17,108,993	\$27,168,284	\$72,197,139
Indirect	507	\$22,504,656	\$30,021,540	\$54,796,172
Induced	174	\$9,669,987	\$17,823,518	\$28,686,760
Total	11,885	\$49,283,635	\$75,013,342	\$155,680,070

Table A14. Economic Impacts of Spending by Visitors to Multi-Discipline Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	469	\$12,944,302	\$19,940,931	\$32,855,310
Indirect	62	\$4,353,342	\$6,688,097	\$11,814,289
Induced	73	\$4,042,146	\$7,472,980	\$12,022,883
Total	603	\$21,339,790	\$34,102,008	\$56,692,483



Table A15. Grand Total of Economic Impacts of Multi-Discipline Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	11,673	\$30,053,295	\$47,109,215	\$105,052,449
Indirect	569	\$26,857,998	\$36,709,637	\$66,610,461
Induced	247	\$13,712,133	\$25,296,498	\$40,709,643
Total	12,488	\$70,623,425	\$109,115,350	\$212,372,553

Table A16. Economic Impacts of the Operations of Music Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	12,052	\$31,127,959	\$41,890,334	\$75,135,306
Indirect	333	\$15,888,226	\$21,586,471	\$35,742,973
Induced	207	\$11,480,970	\$21,162,885	\$34,061,138
Total	12,592	\$58,497,155	\$84,639,690	\$144,939,417

Table A17. Economic Impacts of Spending by Visitors to Music Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	138	\$3,805,814	\$5,862,925	\$9,659,942
Indirect	18	\$1,279,946	\$1,966,399	\$3,473,574
Induced	21	\$1,188,450	\$2,197,165	\$3,534,904
Total	177	\$6,274,211	\$10,026,490	\$16,668,420

Table A18. Grand Total of Economic Impacts of Music Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	12,190	\$34,933,773	\$47,753,260	\$84,795,249
Indirect	352	\$17,168,172	\$23,552,870	\$39,216,547
Induced	228	\$12,669,420	\$23,360,051	\$37,596,041
Total	12,770	\$64,771,366	\$94,666,180	\$161,607,837

Table A19. Economic Impacts of the Operations of Theater Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	5,642	\$20,443,574	\$27,511,864	\$49,345,806
Indirect	219	\$10,434,739	\$14,177,114	\$23,474,527
Induced	136	\$7,540,233	\$13,898,920	\$22,369,966
Total	5,997	\$38,418,547	\$55,587,898	\$95,190,299



Table A20. Economic Impacts of Spending by Visitors to Theater Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	52	\$1,430,404	\$2,203,564	\$3,630,661
Indirect	7	\$481,064	\$739,065	\$1,305,533
Induced	8	\$446,676	\$825,798	\$1,328,583
Total	67	\$2,358,144	\$3,768,427	\$6,264,777

Table A21. Grand Total of Economic Impacts of Theater Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	5,694	\$21,873,979	\$29,715,427	\$52,976,467
Indirect	226	\$10,915,803	\$14,916,179	\$24,780,060
Induced	144	\$7,986,909	\$14,724,718	\$23,698,550
Total	6,063	\$40,776,690	\$59,356,325	\$101,455,076

Table A22. Economic Impacts of the Operations of Visual Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	11,245	\$29,866,708	\$34,312,303	\$63,346,456
Indirect	182	\$11,628,218	\$18,720,119	\$34,753,547
Induced	175	\$9,691,952	\$17,930,426	\$28,844,717
Total	11,602	\$51,186,878	\$70,962,847	\$126,944,720

Table A23. Economic Impacts of Spending by Visitors to Visual Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	170	\$4,691,253	\$7,226,960	\$11,907,368
Indirect	22	\$1,577,731	\$2,423,889	\$4,281,715
Induced	26	\$1,464,948	\$2,708,345	\$4,357,314
Total	219	\$7,733,932	\$12,359,194	\$20,546,397

Table A24. Grand Total of Economic Impacts of Visual Arts Organizations: 2019

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	11,415	\$34,557,961	\$41,539,262	\$75,253,824
Indirect	205	\$13,205,950	\$21,144,008	\$39,035,262
Induced	201	\$11,156,900	\$20,638,771	\$33,202,030
Total	11,821	\$58,920,810	\$83,322,041	\$147,491,117



Detailed Fiscal Impacts by Discipline: 2019

Table A25. Grand Total of Government Revenues Generated by All Arts Organizations: 2019

	Operations	Visitor Spending	Total
Sub County General	\$995,977	\$702,098	\$1,698,075
Sub County Special Districts	\$2,337	\$1,710	\$4,047
County	\$6,032,611	\$4,075,195	\$10,107,806
State	\$8,573,326	\$5,478,762	\$14,052,088
Federal	\$20,182,545	\$10,036,940	\$30,219,485
Total	\$35,786,796	\$20,294,705	\$56,081,502

Table A26. Government Revenues Generated by Dance Organizations: 2019

	Operations	Visitor Spending	Total
Sub County General	\$20,769	\$6,423	\$27,192
Sub County Special Districts	\$49	\$16	\$64
County	\$126,453	\$37,279	\$163,732
State	\$180,224	\$50,118	\$230,342
Federal	\$426,459	\$91,816	\$518,275
Total	\$753,954	\$185,651	\$939,605

Table A27. Government Revenues Generated by Folk & Traditional Arts Organizations: 2019

	Operations	Visitor Spending	Total
Sub County General	\$45,442	\$157,772	\$203,215
Sub County Special Districts	\$109	\$384	\$494
County	\$267,315	\$915,759	\$1,183,074
State	\$370,525	\$1,231,162	\$1,601,687
Federal	\$751,966	\$2,255,455	\$3,007,420
Total	\$1,435,358	\$4,560,532	\$5,995,890

Table A28. Government Revenues Generated by Literary Arts Organizations: 2019

	Operations	Visitor Spending	Total
Sub County General	\$4,632	\$3,581	\$8,213
Sub County Special Districts	\$11	\$9	\$20
County	\$27,250	\$20,786	\$48,036
State	\$37,771	\$27,945	\$65,716
Federal	\$76,654	\$51,195	\$127,849
Total	\$146,318	\$103,515	\$249,834



Table A29. Government Revenues Generated by Multi-Discipline Organizations: 2019

	Operations	Visitor Spending	Total
Sub County General	\$279,791	\$302,400	\$582,191
Sub County Special Districts	\$650	\$736	\$1,387
County	\$1,711,159	\$1,755,224	\$3,466,383
State	\$2,442,981	\$2,359,753	\$4,802,735
Federal	\$6,096,463	\$4,323,002	\$10,419,465
Total	\$10,531,045	\$8,741,116	\$19,272,161

Table A30. Government Revenues Generated by Music Organizations: 2019

	Operations	Visitor Spending	Total
Sub County General	\$251,943	\$88,910	\$340,853
Sub County Special Districts	\$589	\$217	\$805
County	\$1,533,967	\$516,062	\$2,050,028
State	\$2,186,235	\$693,802	\$2,880,037
Federal	\$5,173,244	\$1,271,026	\$6,444,270
Total	\$9,145,977	\$2,570,016	\$11,715,993

Table A31. Government Revenues Generated by Theater Organizations: 2019

	Operations	Visitor Spending	Total
Sub County General	\$165,466	\$33,417	\$198,883
Sub County Special Districts	\$387	\$81	\$468
County	\$1,007,447	\$193,960	\$1,201,407
State	\$1,435,830	\$260,763	\$1,696,593
Federal	\$3,397,575	\$477,711	\$3,875,287
Total	\$6,006,705	\$965,933	\$6,972,638

Table A32. Government Revenues Generated by Visual Arts Organizations: 2019

	Operations	Visitor Spending	Total
Sub County General	\$227,933	\$109,595	\$337,528
Sub County Special Districts	\$542	\$267	\$809
County	\$1,359,020	\$636,125	\$1,995,145
State	\$1,919,760	\$855,218	\$2,774,978
Federal	\$4,260,184	\$1,566,735	\$5,826,919
Total	\$7,767,439	\$3,167,941	\$10,935,380



Appendix B

Detailed Economic Impacts by Discipline: 2020

Table B1. Economic Impacts of the Operations of All Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	31,107	\$105,133,868	\$136,372,089	\$257,285,323
Indirect	1,148	\$56,333,699	\$78,871,870	\$137,764,446
Induced	704	\$39,123,531	\$72,159,627	\$116,129,954
Total	32,960	\$200,591,097	\$287,403,586	\$511,179,722

Table B2. Economic Impacts of Spending by Visitors to All Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	374	\$10,320,770	\$15,902,342	\$26,196,555
Indirect	49	\$3,471,549	\$5,332,771	\$9,419,648
Induced	58	\$3,223,077	\$5,958,716	\$9,586,664
Total	481	\$17,015,396	\$27,193,829	\$45,202,867

Table B3. Grand Total of Economic Impacts of All Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	31,481	\$115,454,639	\$152,274,431	\$283,481,877
Indirect	1,197	\$59,805,247	\$84,204,641	\$147,184,094
Induced	763	\$42,346,608	\$78,118,344	\$125,716,618
Total	33,441	\$217,606,493	\$314,597,416	\$556,382,589

Table B4. Economic Impacts of the Operations of Dance Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	306	\$2,305,017	\$3,101,968	\$5,563,749
Indirect	25	\$1,176,519	\$1,598,472	\$2,646,757
Induced	15	\$850,163	\$1,567,106	\$2,522,218
Total	346	\$4,331,698	\$6,267,546	\$10,732,724

Table B5. Economic Impacts of Spending by Visitors to Dance Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	7	\$200,425	\$308,816	\$508,728
Indirect	1	\$67,412	\$103,557	\$182,920
Induced	1	\$62,590	\$115,714	\$186,166
Total	9	\$330,428	\$528,087	\$877,815



Table B6. Grand Total of Economic Impacts of Dance Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	313	\$2,505,442	\$3,410,783	\$6,072,477
Indirect	26	\$1,243,931	\$1,702,029	\$2,829,677
Induced	16	\$912,753	\$1,682,820	\$2,708,384
Total	355	\$4,662,126	\$6,795,632	\$11,610,539

Table B7. Economic Impacts of the Operations of Folk & Traditional Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	1,152	\$7,473,679	\$7,759,911	\$9,069,494
Indirect	11	\$567,827	\$791,100	\$1,421,718
Induced	37	\$2,056,542	\$3,776,306	\$6,080,955
Total	1,200	\$10,098,047	\$12,327,317	\$16,572,167

Table B8. Economic Impacts of Spending by Visitors to Folk & Traditional Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	66	\$1,810,428	\$2,789,575	\$4,595,198
Indirect	9	\$609,114	\$935,588	\$1,652,583
Induced	10	\$565,416	\$1,045,324	\$1,681,767
Total	84	\$2,984,958	\$4,770,487	\$7,929,548

Table B9. Grand Total of Economic Impacts of Folk & Traditional Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	1,218	\$9,284,106	\$10,549,485	\$13,664,692
Indirect	19	\$1,176,941	\$1,726,688	\$3,074,301
Induced	47	\$2,621,958	\$4,821,630	\$7,762,722
Total	1,284	\$13,083,005	\$17,097,803	\$24,501,715

Table B10. Economic Impacts of the Operations of Literary Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	75	\$923,715	\$959,092	\$1,120,951
Indirect	1	\$70,181	\$97,777	\$175,718
Induced	5	\$254,180	\$466,735	\$751,580
Total	81	\$1,248,076	\$1,523,604	\$2,048,250



Table B11. Economic Impacts of Spending by Visitors to Literary Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	1	\$14,020	\$21,602	\$35,587
Indirect	0	\$4,716	\$7,244	\$12,796
Induced	0	\$4,378	\$8,094	\$13,023
Total	1	\$23,114	\$36,941	\$61,405

Table B12. Grand Total of Economic Impacts of Literary Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	76	\$937,735	\$980,695	\$1,156,538
Indirect	1	\$74,897	\$105,021	\$188,514
Induced	5	\$258,558	\$474,830	\$764,603
Total	82	\$1,271,190	\$1,560,545	\$2,109,655

Table B13. Economic Impacts of the Operations of Multi-Discipline Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	17,130	\$12,004,909	\$19,063,237	\$50,658,744
Indirect	356	\$15,790,897	\$21,065,288	\$38,448,965
Induced	122	\$6,785,164	\$12,506,272	\$20,128,709
Total	17,608	\$34,580,970	\$52,634,797	\$109,236,418

Table B14. Economic Impacts of Spending by Visitors to Multi-Discipline Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	141	\$3,904,139	\$6,015,512	\$9,909,672
Indirect	19	\$1,313,149	\$2,017,218	\$3,563,159
Induced	22	\$1,219,208	\$2,254,030	\$3,626,390
Total	182	\$6,436,496	\$10,286,760	\$17,099,221

Table B15. Grand Total of Economic Impacts of Multi-Discipline Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	17,271	\$15,909,048	\$25,078,749	\$60,568,417
Indirect	374	\$17,104,046	\$23,082,506	\$42,012,123
Induced	144	\$8,004,371	\$14,760,302	\$23,755,099
Total	17,790	\$41,017,465	\$62,921,557	\$126,335,639



Table B16. Economic Impacts of the Operations of Music Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	5,733	\$36,204,686	\$48,722,320	\$87,389,288
Indirect	388	\$18,479,471	\$25,107,056	\$41,572,372
Induced	240	\$13,353,427	\$24,614,386	\$39,616,243
Total	6,361	\$68,037,584	\$98,443,762	\$168,577,903

Table B17. Economic Impacts of Spending by Visitors to Music Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	31	\$845,994	\$1,303,511	\$2,147,343
Indirect	4	\$284,548	\$437,114	\$772,107
Induced	5	\$264,192	\$488,429	\$785,808
Total	39	\$1,394,735	\$2,229,055	\$3,705,258

Table B18. Grand Total of Economic Impacts of Music Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	5,764	\$37,050,681	\$50,025,832	\$89,536,631
Indirect	392	\$18,764,019	\$25,544,170	\$42,344,479
Induced	245	\$13,617,619	\$25,102,816	\$40,402,051
Total	6,401	\$69,432,319	\$100,672,818	\$172,283,161

Table B19. Economic Impacts of the Operations of Theater Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	3,575	\$18,606,928	\$25,040,203	\$44,912,589
Indirect	199	\$9,497,284	\$12,903,445	\$21,365,580
Induced	124	\$6,862,820	\$12,650,244	\$20,360,253
Total	3,898	\$34,967,032	\$50,593,892	\$86,638,422

Table B20. Economic Impacts of Spending by Visitors to Theater Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	34	\$947,249	\$1,459,525	\$2,404,353
Indirect	5	\$318,605	\$489,431	\$864,518
Induced	5	\$295,813	\$546,888	\$879,860
Total	44	\$1,561,667	\$2,495,845	\$4,148,731



Table B21. Grand Total of Economic Impacts of Theater Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	3,609	\$19,554,177	\$26,499,729	\$47,316,942
Indirect	204	\$9,815,889	\$13,392,876	\$22,230,099
Induced	129	\$7,158,633	\$13,197,132	\$21,240,113
Total	3,942	\$36,528,699	\$53,089,737	\$90,787,154

Table B22. Economic Impacts of the Operations of Visual Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	3,136	\$27,614,935	\$31,725,358	\$58,570,509
Indirect	169	\$10,751,520	\$17,308,733	\$32,133,335
Induced	161	\$8,961,236	\$16,578,578	\$26,669,996
Total	3,466	\$47,327,690	\$65,612,669	\$117,373,839

Table B23. Economic Impacts of Spending by Visitors to Visual Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	94	\$2,598,514	\$4,003,800	\$6,595,673
Indirect	12	\$874,005	\$1,342,619	\$2,371,565
Induced	15	\$811,480	\$1,500,236	\$2,413,650
Total	121	\$4,283,998	\$6,846,655	\$11,380,888

Table B24. Grand Total of Economic Impacts of Visual Arts Organizations: 2020

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	3,230	\$30,213,449	\$35,729,159	\$65,166,181
Indirect	181	\$11,625,524	\$18,651,351	\$34,504,900
Induced	176	\$9,772,715	\$18,078,814	\$29,083,646
Total	3,587	\$51,611,689	\$72,459,323	\$128,754,727



Detailed Fiscal Impacts by Discipline: 2020

Table B25. Grand Total of Government Revenues Generated by All Arts Organizations: 2020

	Operations	Visitor Spending	Total
Sub County General	\$905,529	\$241,295	\$1,146,824
Sub County Special Districts	\$2,125	\$588	\$2,712
County	\$5,484,668	\$1,400,480	\$6,885,148
State	\$7,795,624	\$1,882,686	\$9,678,310
Federal	\$18,307,596	\$3,447,241	\$21,754,838
Total	\$32,495,541	\$6,972,291	\$39,467,832

Table B26. Government Revenues Generated by Dance Organizations: 2020

	Operations	Visitor Spending	Total
Sub County General	\$18,656	\$4,685	\$23,341
Sub County Special Districts	\$44	\$11	\$55
County	\$113,590	\$27,191	\$140,781
State	\$161,890	\$36,554	\$198,444
Federal	\$383,077	\$66,942	\$450,019
Total	\$677,257	\$135,383	\$812,640

Table B27. Government Revenues Generated by Folk & Traditional Arts Organizations: 2020

	Operations	Visitor Spending	Total
Sub County General	\$32,190	\$42,372	\$74,563
Sub County Special Districts	\$77	\$103	\$181
County	\$189,360	\$245,912	\$435,271
State	\$262,471	\$330,542	\$593,013
Federal	\$532,674	\$604,792	\$1,137,467
Total	\$1,016,773	\$1,223,722	\$2,240,494

Table B28. Government Revenues Generated by Literary Arts Organizations: 2020

	Operations	Visitor Spending	Total
Sub County General	\$3,979	\$328	\$4,306
Sub County Special Districts	\$10	\$1	\$10
County	\$23,404	\$1,902	\$25,306
State	\$32,440	\$2,557	\$34,997
Federal	\$65,836	\$4,683	\$70,519
Total	\$125,669	\$9,470	\$135,139



Table B29. Government Revenues Generated by Multi-Discipline Organizations: 2020

	Operations	Visitor Spending	Total
Sub County General	\$196,322	\$91,256	\$287,578
Sub County Special Districts	\$456	\$222	\$679
County	\$1,200,673	\$529,661	\$1,730,335
State	\$1,714,173	\$712,050	\$2,426,222
Federal	\$4,277,720	\$1,303,980	\$5,581,700
Total	\$7,389,345	\$2,637,169	\$10,026,514

Table B30. Government Revenues Generated by Music Organizations: 2020

	Operations	Visitor Spending	Total
Sub County General	\$293,033	\$19,774	\$312,808
Sub County Special Districts	\$685	\$48	\$733
County	\$1,784,145	\$114,773	\$1,898,918
State	\$2,542,792	\$154,295	\$2,697,088
Federal	\$6,016,959	\$282,562	\$6,299,521
Total	\$10,637,614	\$571,453	\$11,209,067

Table B31. Government Revenues Generated by Theater Organizations: 2020

	Operations	Visitor Spending	Total
Sub County General	\$150,601	\$22,141	\$172,742
Sub County Special Districts	\$352	\$54	\$406
County	\$916,938	\$128,510	\$1,045,448
State	\$1,306,835	\$172,762	\$1,479,597
Federal	\$3,092,338	\$316,381	\$3,408,719
Total	\$5,467,063	\$639,848	\$6,106,912

Table B32. Government Revenues Generated by Visual Arts Organizations: 2020

	Operations	Visitor Spending	Total
Sub County General	\$210,748	\$60,738	\$271,486
Sub County Special Districts	\$501	\$148	\$649
County	\$1,256,558	\$352,531	\$1,609,089
State	\$1,775,022	\$473,926	\$2,248,947
Federal	\$3,938,991	\$867,902	\$4,806,893
Total	\$7,181,821	\$1,755,245	\$8,937,066

