

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



maryland citizens for the arts

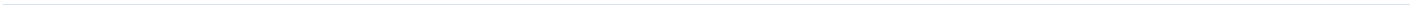
Summary of Results for FY 2021

December 6, 2021

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Thank you to the Maryland State Arts Council for providing economic data used in this analysis and for its continued emergency support throughout the pandemic.



Contents

Table 1. Employment by Organization Discipline 2019-2021 2

Table 2. Total Income of Arts Organizations by Discipline 2019-2021 3

Table 3. Total Attendance by Organization Discipline 2019-2021 3

Table 4. Total Number of Visitors Whose Spending Counts toward Economic Impacts by Organization Discipline 2019-2021 4

Table 5. Total Visitor Spending by Organization Discipline 2019-2021 4

Table 6. Economic Impacts of All Arts Organizations: 2019-2021 6

Table 7. Government Revenues Generated by All Arts Organizations..... 7

Methodology 8

 Economic Impact Concepts 8

 Data 9

 Impacts of Visitor Spending 9

Table 8. Average Per Person Audience Spending by Non-Resident Attendees at Arts Events in Maryland in 2016..... 10

Table 9. Visitor Spending by Discipline of Organization and Type of Spending: 2019 10

Table 10. Visitor Spending by Discipline of Organization and Type of Spending: 2020 11

Table 11. Visitor Spending by Discipline of Organization and Type of Spending: 2021 12

Economic Impacts: 2019 13

 Table A1. Economic Impacts of the Operations of All Arts Organizations: 2019..... 13

 Table A2. Economic Impacts of Spending by Visitors to All Arts Organizations: 2019..... 13

 Table A3. Grand Total of Economic Impacts of All Arts Organizations: 2019 13

Economic Impacts: 2020 14

 Table B1. Economic Impacts of the Operations of All Arts Organizations: 2020..... 14

 Table B2. Economic Impacts of Spending by Visitors to All Arts Organizations: 2020 14

 Table B3. Grand Total of Economic Impacts of All Arts Organizations: 2020..... 14

Economic Impacts: 2021 15

 Table C1. Economic Impacts of the Operations of All Arts Organizations: 2021..... 15

 Table C2. Economic Impacts of Spending by Visitors to All Arts Organizations: 2021 15

 Table C3. Grand Total of Economic Impacts of All Arts Organizations: 2021 15

Fiscal Impacts: 2019 - 2021 16

 Table D1. Total of Government Revenues Generated by All Arts Organizations: 2019 16

 Table D2. Total of Government Revenues Generated by All Arts Organizations: 2020..... 16

 Table D3. Total of Government Revenues Generated by All Arts Organizations: 2021 16



Table 1. Employment by Organization Discipline 2019-2021

Discipline	2019	2021	Change	% Change 2019-2021
Dance	3,770	270	-3,500	-93%
Folk & Traditional Arts	4,559	529	-4,030	-88%
Literary Arts	2,727	211	-2,516	-92%
Multi-Discipline	11,204	6,394	-4,810	-43%
Music	12,052	2,825	-9,227	-77%
Theater	5,642	2,173	-3,469	-61%
Visual Arts	11,245	7,913	-3,332	-30%
Grand Total	51,199	20,315	-30,884	-60%

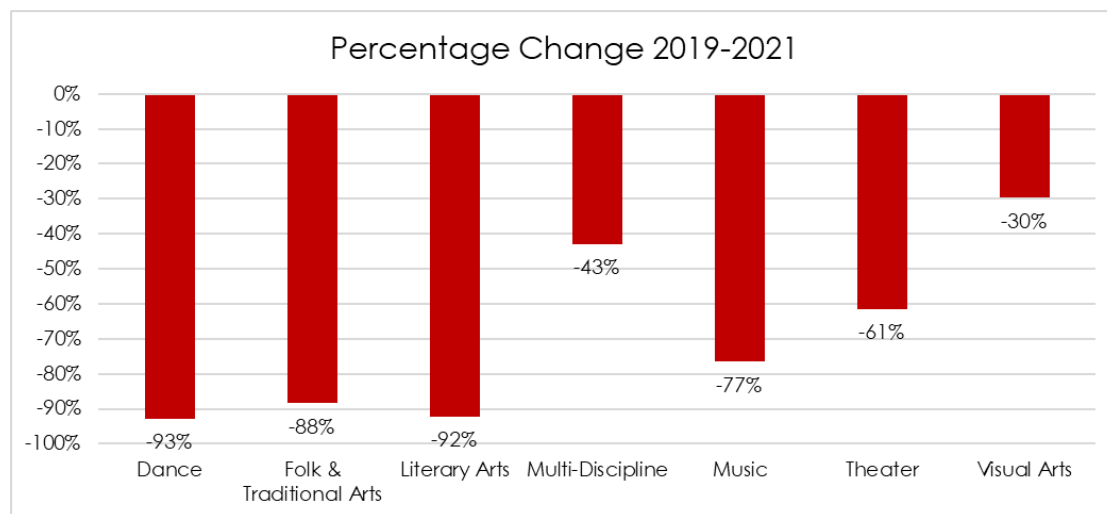


Table 2. Total Income of Arts Organizations by Discipline 2019-2021

Discipline	2019	2021	Change	% Change 2019-2021
Dance	\$6,298,731	\$7,539,244	\$1,240,513	20%
Folk & Traditional Arts	\$13,110,547	\$7,821,533	-\$5,289,014	-40%
Literary Arts	\$1,336,470	\$1,315,670	-\$20,800	-13%
Multi-Discipline	\$74,210,578	\$98,928,977	\$24,718,400	-2%
Music	\$76,407,910	\$55,144,314	-\$21,263,596	33%
Theater	\$50,181,600	\$51,799,598	\$1,617,999	-28%
Visual Arts	\$63,715,531	\$62,075,332	-\$1,640,199	-3%
Grand Total	\$285,261,366	\$284,624,669	-\$636,697	0%*

* 2021 income reflects PPP and other government relief received to stabilize operations.

Table 3. Total Attendance by Organization Discipline 2019-2021

Discipline	2019	2021	Change	% Change 2019-2021
Dance	145,057	16,052	-129,005	-89%
Folk & Traditional Arts	3,563,335	36,474	-3,526,861	-99%
Literary Arts	80,881	1,343	-79,538	-98%
Multi-Discipline	6,829,800	389,543	-6,440,257	-94%
Music	2,008,061	49,545	-1,958,516	-98%
Theater	754,724	38,204	-716,520	-95%
Visual Arts	2,475,245	171,420	-2,303,825	-93%
Grand Total	15,857,103	702,581	-15,154,522	-96%

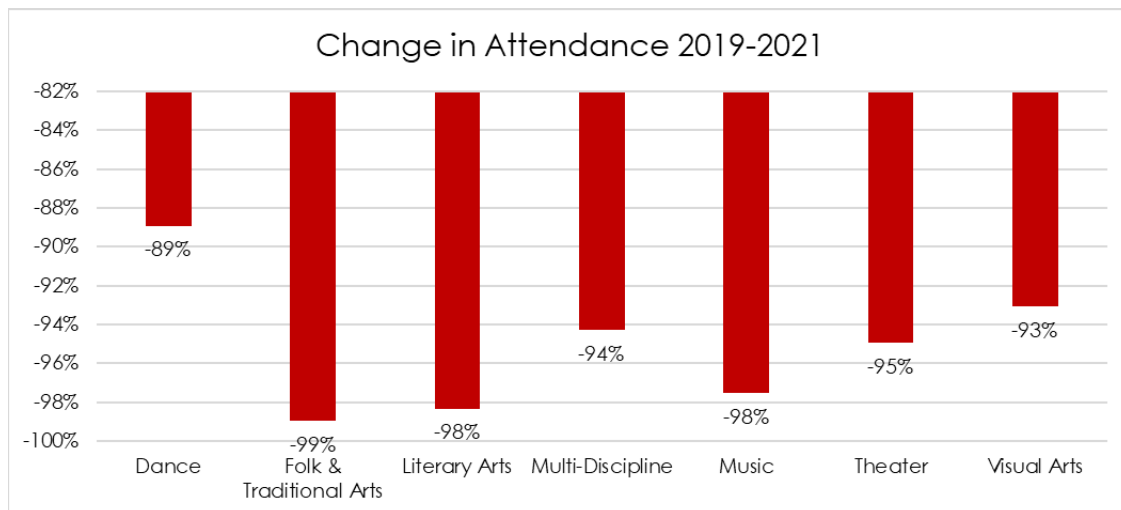


Table 4. Total Number of Visitors Whose Spending Counts toward Economic Impacts by Organization Discipline 2019-2021

Discipline	2019	2021	Change	% Change 2019-2021
Dance	18,333	2,029	-16,305	-89%
Folk & Traditional Arts	450,359	4,610	-445,749	-99%
Literary Arts	10,222	170	-10,053	-98%
Multi-Discipline	863,198	49,233	-813,965	-94%
Music	253,793	6,262	-247,531	-98%
Theater	95,387	4,828	-90,559	-95%
Visual Arts	312,839	21,665	-291,174	-93%
Grand Total	2,004,132	88,797	-1,915,335	-96%

Table 5. Total Visitor Spending by Organization Discipline 2019-2021¹

Discipline	2019	2021	Change	% Change 2019-2021
Dance	\$760,283	\$84,133	-\$676,150	-89%
Folk & Traditional Arts	\$18,676,397	\$191,170	-\$18,485,227	-99%
Literary Arts	\$423,919	\$7,039	-\$416,880	-98%
Multi-Discipline	\$35,796,818	\$2,041,700	-\$33,755,119	-94%
Music	\$10,524,788	\$259,679	-\$10,265,109	-98%
Theater	\$3,955,711	\$200,237	-\$3,755,474	-95%
Visual Arts	\$12,973,425	\$898,458	-\$12,074,966	-93%
Grand Total	\$83,111,341	\$3,682,416	-\$79,428,925	-96%

¹ 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 2019 through 2021.



COVID-19's Impact on the Economic Vitality of Maryland Art's Economy

July 1, 2019-June 30, 2021

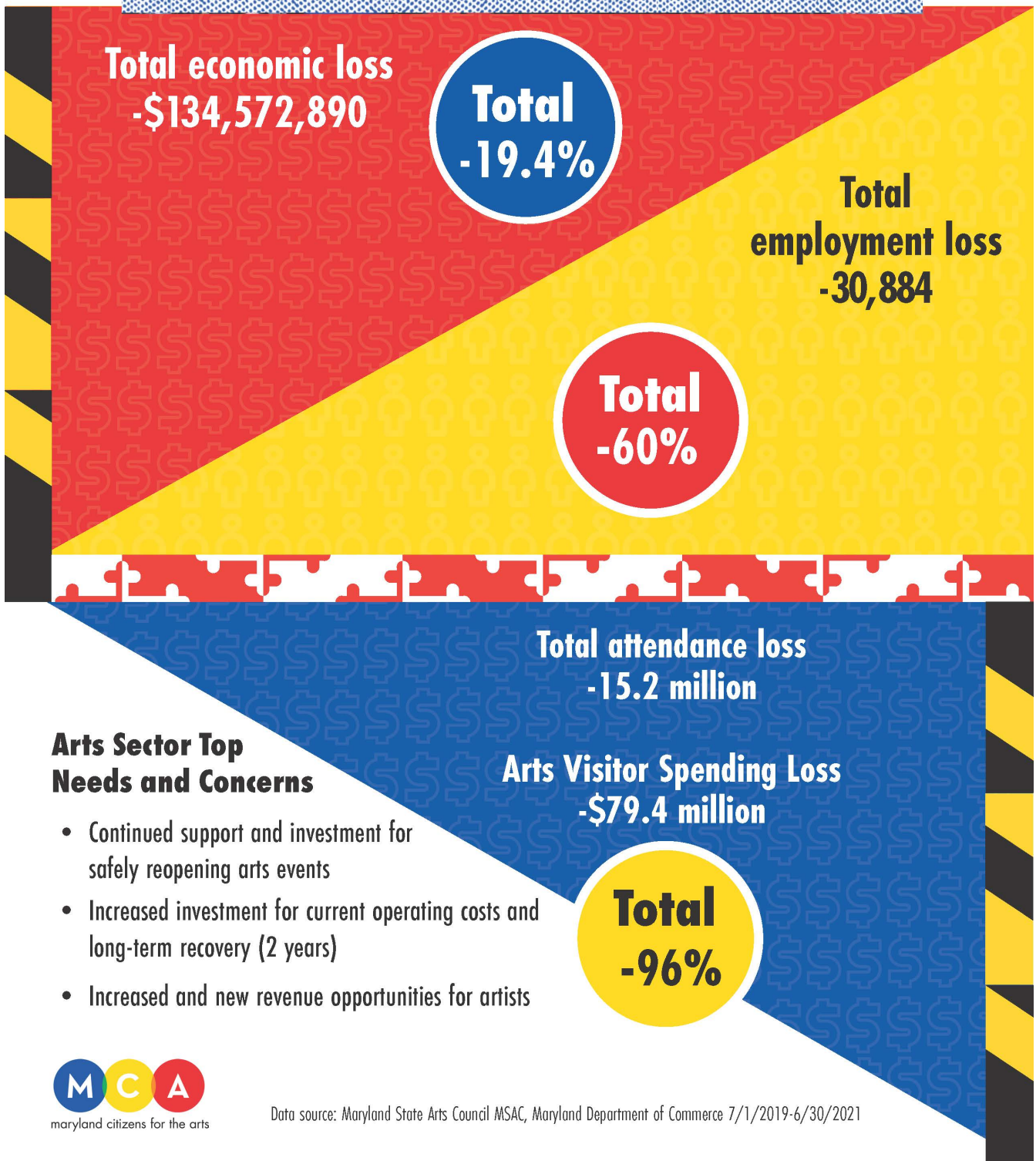


Table 6. Economic Impacts of All Arts Organizations: 2019-2021

	Employment	GDP (2020 \$)	Output (2020 \$)
Operations			
2019	53,251	\$312,357,287	\$560,482,082
2020	32,960	\$287,403,586	\$511,179,722
2021	22,380	\$301,103,830	\$551,912,523
% Change 2019-2021	-58.0%	-3.6%	-1.5%
Visitor Spending			
2019	1,401	\$79,176,411	\$131,625,897
2020	481	\$27,193,829	\$45,202,867
2021	60	\$3,382,865	\$5,622,565
% Change 2019-2021	-95.7%	-95.7%	-95.7%
Total			
2019	54,652	\$391,533,698	\$692,107,979
2020	33,441	\$314,597,416	\$556,382,589
2021	22,439	\$304,486,696	\$557,535,088
% Change 2019-2021	-58.9%	-22.2%	-19.4%



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
			2021
	Operations	Visitor Spending	Total
Sub County General	\$981,499	\$29,995	\$1,011,494
Sub County Special Districts	\$2,300	\$73	\$2,373
County	\$5,952,197	\$173,753	\$6,125,951
State	\$8,465,271	\$233,614	\$8,698,885
Federal	\$20,089,971	\$436,381	\$20,526,352
Total	\$35,491,239	\$873,817	\$36,365,056
Percentage Change 2019-2021	-.8%	-95.7%	-35.2%

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.



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,² 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.

² 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 1973.³ 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, 2020, and 2021 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 2019-2021 by discipline of the arts organizations is shown in Table 3. In all three years, 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.⁴ 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.

³ 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.

⁴ 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.⁵ The average amounts by type of spending are provided in Table 8. These figures were used to calculate spending for each year of the analysis. 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, 10, and 11. 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 through D.

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	Dance	Folk & 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

⁵ 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	Dance	Folk & 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



Table 11. Visitor Spending by Discipline of Organization and Type of Spending: 2021

Type of Spending	Dance	Folk & Traditional Arts	Literary Arts	Multi-Discipline
Refreshments and/or snacks	\$10,286	\$23,372	\$861	\$249,612
Meals/drinks	\$33,819	\$76,846	\$2,830	\$820,717
Retail/gifts and souvenirs	\$9,596	\$21,805	\$803	\$232,873
Clothing and accessories	\$2,678	\$6,085	\$224	\$64,988
Local transportation	\$9,373	\$21,297	\$784	\$227,457
Child care	\$1,927	\$4,379	\$161	\$46,772
Overnight lodging	\$15,540	\$35,311	\$1,300	\$377,126
Other/misc.	\$913	\$2,074	\$76	\$22,155
Total	\$84,133	\$191,170	\$7,039	\$2,041,700

Type of Spending	Music	Theater	Visual Arts	Grand Total
Refreshments and/or snacks	\$31,748	\$24,480	\$109,843	\$450,201
Meals/drinks	\$104,385	\$80,491	\$361,160	\$1,480,248
Retail/gifts and souvenirs	\$29,619	\$22,839	\$102,477	\$420,010
Clothing and accessories	\$8,266	\$6,374	\$28,598	\$117,212
Local transportation	\$28,930	\$22,308	\$100,093	\$410,243
Child care	\$5,949	\$4,587	\$20,582	\$84,357
Overnight lodging	\$47,966	\$36,986	\$165,956	\$680,186
Other/misc.	\$2,818	\$2,173	\$9,749	\$39,959
Total	\$259,679	\$200,237	\$898,458	\$3,682,416



Economic Impacts: 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



Economic Impacts: 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



Economic Impacts: 2021

Table C1. Economic Impacts of the Operations of All Arts Organizations: 2021

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	20,315	\$103,472,591	\$136,863,373	\$273,136,611
Indirect	1,333	\$64,224,156	\$89,324,218	\$158,209,934
Induced	731	\$40,617,290	\$74,916,238	\$120,565,979
Total	22,380	\$208,314,037	\$301,103,830	\$551,912,523

Table C2. Economic Impacts of Spending by Visitors to All Arts Organizations: 2021

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	46	\$1,283,746	\$1,978,369	\$3,258,519
Indirect	6	\$431,830	\$663,301	\$1,171,575
Induced	7	\$400,914	\$741,196	\$1,192,471
Total	60	\$2,116,490	\$3,382,865	\$5,622,565

Table C3. Grand Total of Economic Impacts of All Arts Organizations: 2021

Impact	Employment	Employee Compensation (2020 \$)	GDP (2020 \$)	Output (2020 \$)
Direct	20,361	\$104,756,337	\$138,841,742	\$276,395,130
Indirect	1,339	\$64,655,986	\$89,987,519	\$159,381,509
Induced	739	\$41,018,203	\$75,657,434	\$121,758,449
Total	22,439	\$210,430,527	\$304,486,696	\$557,535,088



Fiscal Impacts: 2019 - 2021

Table D1. 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 D2. 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 D3. Total of Government Revenues Generated by All Arts Organizations: 2021

	Operations	Visitor Spending	Total
Sub County General	\$981,499	\$29,995	\$1,011,494
Sub County Special Districts	\$2,300	\$73	\$2,373
County	\$5,952,197	\$173,753	\$6,125,951
State	\$8,465,271	\$233,614	\$8,698,885
Federal	\$20,089,971	\$436,381	\$20,526,352
Total	\$35,491,239	\$873,817	\$36,365,056

