



Economic Impact of COVID on the MD Arts Sector

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Thank you!

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.



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Thank you!

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Overview

- Methodology & Data
- Main Data Points
- Economic Impact
- Regional Impact
- Government Response
- Considerations

Methodology & Data

- IMPLAN & AEP 5
- MSAC Data
- Fiscal Year 2019 vs. 2020

Attendance

- Total Attendance:
 - FY19: 15 million | **FY 20: 5.5 million**
 - Decline started as COVID fears grew (prior to lock down)
 - Winter/Spring/Early Summer are popular
 - 65% decline in visitor/audience spending

Employment

- Total Employment:
 - FY19: 54,652 | FY 20: 33,441
 - Most orgs reported furloughs not layoffs
 - Contractual workers account for most of the drop

Economic Impact

- Visitor Spending
 - Decline of \$86 million
- Operations spending
 - Decline of \$27 million
- Earned Revenue
 - Decline of \$22 million

Hardest hit regions

- Capital Region: -\$109 million
- Baltimore Region: -\$40.6 million
- Eastern Shore: -\$12 million

Areas of Concern

- Audience hesitancy
- Artist recovery
- Visitor spending & engagement

Statewide Emergency Response

- \$12 million in direct MSAC emergency funds
 - Included County Arts Councils/Organizations/Artists

- \$50 million for entertainment venues
 - FPOs and NPOs

Local Emergency Response

\$3.5 million Montgomery County

\$2 million Anne Arundel County

\$1 million Prince Georges County

\$750k Howard County

\$0 Baltimore City

\$0 Baltimore County



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Next steps

- **Comparison needed to study long term recovery**
- **American Relief Act has local investment implications**
- **Data project comparing FY19/20/21**
 - Initial study was \$35K (included county level data sets)
 - FY21 study will be statewide and utilize national/regional/local data
 - Cost between \$8-10K



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Feedback for support

- Provide funding to sustain minimum budgets and to meet basic needs of individuals
- Invest in ongoing marketing and messaging campaigns
- Dire need for grants supporting artists and creative workers
- Consider providing joint resources to support faster recovery
 - Other major arts cities/hubs are engaging philanthropy and government

Maryland Arts Summit

- June 3&4



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