

Maryland Entertainment Council Preliminary Report

Pursuant to Chapter 434, Acts of 2023

Respectfully submitted to the General Assembly of Maryland by

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Maryland Entertainment Council – Preliminary Report on Maryland’s Film, Television, and Entertainment Industry

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1.0 Executive Summary

In the 2023 Legislative Session, the Maryland General Assembly passed, and Governor Wes Moore signed Chapter 434, Film Production Activity Income Tax Credit Alterations. Among other things, this legislation established the Maryland Entertainment Council (Council). The Council is comprised of an interdisciplinary group of experts across the field of Entertainment and are charged with assessing and making recommendations in order to bolster Maryland’s position in the globally-competitive Media and Entertainment (M&E) market.

According to the International Trade Administration, “the U.S. Media and Entertainment (M&E) industry is the largest in the world at \$660 billion (of the \$2 trillion market).” The M&E market is diverse, representing “businesses that produce, distribute, or offer ancillary products for: the Motion Pictures, Television programs and Commercials along with Streaming Content, Music, Video and Audio recordings, Broadcast, Radio, Text and Book Publishing, eSports and Video Games sectors.”¹

Since the late 90s, countries and state governments in the United States, recognizing the economic benefit and workforce potential of the sector, began to compete for a share of the M&E market, largely through financial production incentive programs. Today, 38 states offer film and television incentives, complementing national incentive programs that include Canada, the Canary Islands, New Zealand, South Korea, and the United Kingdom. Importantly, as market competition has increased, both nationally and globally, specific geographies have differentiated their incentive programs in order to target specific segments of the market including animation to gaming to post-production. Critically, successful incentive programs are *focused*, working from a specific thesis that pinpoints specific opportunities in the market and leverages assets endemic to the given region.

More change is coming. Over the past several years, The M&E market has faced an unprecedented level of disruption. From COVID to the explosive growth and subsequent retraction of streaming, the ascendance of gaming and the creator economy, the threats and opportunities of artificial intelligence and the historic labor strikes by the WGA and SAG-AFTRA,² the business models and broader ecosystem are in a constant state of evolution. These disruptions represent an opportunity: by acting with urgency and forward-thinking, states like Maryland can seize new opportunities that are emerging while maximizing the impact the M&E market can have on its local economies and workforce.

¹ International Trade Association, <https://www.trade.gov/media-entertainment>

² The WGA and SAG-AFTRA strikes affected the appointments timeline of the Maryland Entertainment Council. After shutting down virtually all development and production activity over the Summer of 2023, the WGA strike concluded on September 27 and the SAG-AFTRA strike concluded on November 8.



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The Maryland Entertainment Council is ready to answer the call. The preliminary report contained therein outlines Maryland’s film and television investments to date, highlights meaningful trends that are critical to the state’s participation in the M&E market, now and in the future, and describes the major questions still to be answered. From its initial assessment, the Maryland Entertainment Council is confident that the state is uniquely positioned to capitalize on the major shifts currently underway across the industry because of our geographic diversity, strength and potential of our workforce, world-class institutions and leadership in the arts. With the right leadership and strategic investments, Maryland can leapfrog from middling to national leader in this important industry. To do so, the Maryland Entertainment Council is making the following initial recommendations:

- **The State of Maryland should hire a consultant to examine all tax incentives that specialize in media and entertainment, both nationally and globally.** There are 38 states with an incentive program, and dozens more throughout the world, all pursuing different strategies with varying degrees of success. As the industry undergoes its most significant disruption since the introduction of streaming, the competitive landscape for these programs is also in flux. In order for Maryland to emerge as a national leader in the M&E industry, the State must thoroughly understand the business trends, map Maryland’s assets to the opportunities it is best positioned to seize and avoid strategies that represent a “race to the bottom.” A modest investment in research and analysis will pay outsized dividends as the State competes to “win the decade” in this industry.
- **The Maryland Entertainment Council should expand its membership.** It currently includes national industry, labor, and creative leaders who share the Moore-Miller Administration’s values and believe in Maryland’s potential to uniquely contribute to the M&E market while deriving impact for local economies and workforces. However, there is more potential for the Maryland Entertainment Council to capture. By expanding the Maryland Entertainment Council to include cabinet secretaries or their designees, specifically, the Secretaries of Commerce, Housing and Community Development, and Labor, the Maryland Economic Council can guide the State’s incentive program to drive higher labor force participation of Marylanders as well as greater investment in Maryland infrastructure and small business. Maryland must avoid what is too frequently the case in many states across the nation: a local film and television economy that imports its workforce, infrastructure, and business ecosystem instead of developing and leveraging from within.
- **Maryland should partner with its tech sector to unleash its entrepreneurs and technology businesses in the emerging segments of the M&E market.** Animation, gaming, and virtual productions and other emerging technologies will drive outsized growth in the industry in the decades ahead. Maryland is well positioned to seize more than its fair share of the industry’s future potential if its technology sector, and the



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ecosystems that support it drive commercial interest towards the M&E market. Furthermore, Maryland can also align its current investments to the growing segments of the M&E markets by ensuring that anchors such as TEDCO bring a sophisticated M&E lens to its work.

- **Align Maryland’s current investments in the arts and culture to its strategy to build a competitive M&E industry across the state to further elevate Maryland’s national and global brand position, strengthen its cultural exports, and ensure the sustainability of local artists and creatives.** Today, Maryland spends the second most on the arts and culture per capita of any state in the nation. Despite this fact, many artists and creatives struggle to sustain their livelihoods and are disconnected from the larger commercial opportunities in the sector, beginning with media and entertainment. The Maryland Entertainment Council will explore a collaboration with the world-class leaders within the Maryland Arts Council to identify opportunities for partnership and investment to begin bridging this disconnect. Maryland can look internationally for inspiration: Canada, the United Kingdom, and South Korea all have robust programs that invest in indigenous creative talent before exporting their contributions, globally, through the M&E market; Maryland has a local tradition too: John Waters, David Simon, and Barry Levinson all adapted regional stories and culture for a global audience. With the right program design and support, Maryland can intentionally pursue this strategy both equitably and competitively, to further cement its global reputation as an epicenter of arts and culture.

These recommendations are preliminary, and there is a lot of work ahead to define a strategy that uniquely leverages Maryland’s strengths to seize the right opportunities during this critical moment in the M&E market. Nevertheless, the Council submits this initial report with optimism, energy, and enthusiasm. The flagship members of the Maryland Entertainment Council are not only national leaders but are deeply rooted in the Moore-Miller Administration’s values and strategic orientation. We look forward to deeply collaborating with members of the General Assembly and colleagues in the Administration to drive this important work forward.



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2.0 Introduction

In the 2023 Legislative Session, the Maryland General Assembly passed, and Governor Wes Moore signed Chapter 434, Film Production Activity Income Tax Credit Alterations.³ Among other things, this legislation established the Maryland Entertainment Council (Council). The Council is comprised of an interdisciplinary group of experts across the field of Entertainment that are charged with assessing and making recommendations in order to bolster Maryland’s position in the Media and Entertainment (M&E) market specifically, and the creative economy more broadly.

For the purpose of this preliminary report, The Council has been charged with (1) defining Maryland’s creative and competitive profile in the film, television, and entertainment industry; (2) assessing the existing infrastructure and advantages that Maryland is uniquely positioned to leverage; (3) recommending how best to utilize those to advance the industry; (4) what, if any, additional investments should be made to support the industry; and, (5) how best to measure the economic impact of additional investment in the industry in Maryland.⁴

To date, the State’s investments have primarily focused on the Arts and Film/Television Production with the establishment of the Maryland Arts Council and the Maryland Film Office, both located within the Department of Commerce. Given the diversity and dynamic nature of the Media and Entertainment (M&E) sector, and the growth of creative and cultural economies, a broader view is necessary. As such, our preliminary report focuses on the history of investment and economic impact of Film and Television production, Arts and the Creative Economy and other growth sectors within the M&E market such as gaming, animation and other emerging technologies that will drive outsized growth in the industry in the decades ahead.

3.0 Background

3.1 Arts, Culture and the Creative Economy

At the heart of the creative economy are the industries that lie at the crossroads of arts, culture, business, and technology. According to UNESCO, “The cultural and creative industries are among the fastest growing sectors in the world. With an estimated global worth of 4.3 trillion USD per year, the culture sector now accounts for 6.1% of the global economy. The

³ The text of the statute establishing the Council is in Appendix A and also located at: https://mgaleg.maryland.gov/2023RS/Chapters_noln/CH_434_sb0452e.pdf

⁴ Included as Appendix B, “Measurable Objectives”



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creative industries are responsible for nearly 30 million jobs worldwide; employing more people aged 15 to 29 than any other sector....”⁵

The United Nations Conference on Trade and Development (UNCTAD) additionally affirms that “[as] the global community faces some of its most significant challenges in decades, the creative economy can help diversify production, build competitive advantage, attract investment, support entrepreneurship and innovation, and promote cultural diversity and well-being.”⁶

Maryland has always been at the forefront of supporting a creative economy. In FY 2023, Maryland was 2nd in the nation in per capita public funding for the arts—and the U.S. Bureau of Economic Analysis (USBEA) reports that arts and cultural production accounts for \$12,330,826,000 and 2.8 percent of the Maryland economy, contributing 72,403 jobs.⁷

There are several programs and departments within the Department of Commerce that support this field including the Maryland Arts Council and Maryland Arts and Entertainment Districts, which are highlighted below:

The Maryland State Arts Council

The Maryland State Arts Council (MSAC) was established in 1967 to advance the arts in our state. Its work aims to ensure access to the transformational power of the arts for all Marylanders. MSAC has long been seen as a leader and model for the 56 other state and US territories’ arts agencies, and there has been longstanding, bipartisan support for arts funding in Maryland. In FY 2023, Maryland was 2nd in the nation in per capita public funding for the arts.

Currently, MSAC provides funding and professional development support to independent artists, nonprofit arts organizations, and arts programs in Maryland through 15 grant programs and other offerings. In FY 2024, MSAC will distribute over \$30 million in grants to support:

- 320+ organizations with over \$18 million in funding for general operations and arts programming;
- 24 county arts agencies with \$5 million in general operating support that provides funding and arts programming locally in every Maryland county and Baltimore City;
- 29 Arts & Entertainment Districts with general operating support and technical assistance;

⁵ UNESCO, [Promoting the Diversity of Cultural Expressions and Creative Economy](#), 30 March 2023

⁶ UNCTAD, <https://unctad.org/topic/trade-analysis/creative-economy-programme>

⁷ NASAA, https://nasaa-arts.org/nasaa_research/creative-economy-state-profiles/



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- 250+ community-based projects through Creativity, Public Art Across Maryland, and Maryland Traditions grants;
- 100+ teaching artist engagements in schools and community settings;
- 200+ artists’ working and living expenses through a new Grants for Artists program;
- 30+ engagements of Maryland performing artists at Maryland venues; and
- 50+ professional development opportunities for artists.

In addition, MSAC offers free professional development sessions for Maryland artists and arts administrators, providing 79 sessions that served over 3,000 constituents in FY 2023.

Maryland Arts and Entertainment Districts

Maryland’s Arts & Entertainment (A&E) Districts help develop and promote community involvement, tourism, and revitalization through tax-related incentives. Maryland’s [29 A&E Districts](#) are unique destinations, attracting audiences, artists, arts organizations, and other creative enterprises to specific neighborhoods in Maryland’s towns and cities. Each reflects the traditions and evolving culture of its community and invites residents and visitors to experience the best Maryland has to offer. MSAC administers the designation process and supports A&E District management entities with funding and technical support.

3.2 Film / Television Production

According to the Motion Picture Association, the Film and Television industry currently supports 2.4 million jobs, generating a total of \$186 billion in wages annually and represents a network of small businesses. Of the 122,000 businesses that service the production, promotion and distribution of Film and Television industry, 92% employ fewer than 10 people.⁸

Since the late 90’s, countries and state governments in the United States, recognizing the economic benefit and workforce potential of the sector, began to compete for film and television production, largely through financial production incentive programs.

Today, 38 states offer some form of film and television incentives. As market competition has increased, both nationally and globally, specific geographies have differentiated their incentive programs in order to target specific segments of the market including animation to gaming to post-production or to incentivize specific community-benefit or workforce goals.

Critically, the most competitive programs are focused, working from a specific thesis that pinpoints specific opportunities in the market and leverages assets endemic to the given region.

⁸ <https://www.motionpictures.org/research-docs/the-american-motion-picture-and-television-industry-creating-jobs-trading-around-the-world-4/>



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In addition to a competitive and *consistent* incentive, states and countries wanting to compete for this market must also consider the industry infrastructure, existing and potential workforce and region’s endemic assets such as the geographic diversity of a state.

U.S. PRODUCTION INCENTIVES			
	STATE	PER PROJECT CAP	FUNDING CAP
1	Connecticut	No Cap	No Cap
2	Georgia ⁽¹⁾	No Cap	No Cap
3	Illinois	No Cap	No Cap
4	Maine	No Cap	No Cap
5	Massachusetts	No Cap	No Cap
6	West Virginia	No Cap	No Cap
7	New York – Production & Post Only	No Cap	\$395M / CY \$25M / CY (Post only)
	New York – Commercial	No Cap	\$7M / CY
8	California ⁽¹⁾	\$20M Non-Indie/TV \$30M w/Uplifts \$2.5M Indie \$3.0M w/Uplifts	\$330M / FY
9	Louisiana ⁽¹⁾	\$20M / \$25M	\$180M / FY
10	New Mexico	No Cap	\$110M / FY
11	Texas ⁽¹⁾	No Cap	\$200M thru 8/31/25
12	New Jersey	No Cap	\$100M / FY
13	Pennsylvania	20% of annual cap	\$100M / FY
14	Arizona	No Cap	\$75M / CY
15	Kentucky	\$10M	\$75M / CY
16	Hawaii	\$17M	\$50M / CY
17	Ohio	No Cap	\$40M / FY
18	Rhode Island	\$7M	\$40M / CY
19	Puerto Rico	No Cap	\$38M / FY
20	North Carolina	\$7M Film/TV Movie \$15M TV Series \$250K Commercial	\$31M / FY
21	Oklahoma	No Cap	\$30M / FY
22	Minnesota	No Cap	\$25M / CY
23	Alabama	No Cap	\$20M / FY
24	Mississippi	\$10M	\$20M / FY
25	Oregon	50% of annual cap	\$20M /FY



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26	Maryland	\$10M	\$15M FY24
27	South Carolina	No Cap	\$15M / FY
28	Washington	No Cap	\$15M / CY
29	Montana	No Cap	\$10M / CY
30	Nevada	\$6M	\$10M / FY
31	Utah	No Cap	\$6.79M / FY
32	Virginia	Tax Credit, <i>plus a</i> Discretionary Grant	\$6.5M Per Fiscal Year Discretionary
33	Arkansas	No Cap	\$4M / FY
34	US Virgin Islands	\$500k	\$2.5M / CY
35	Tennessee	No Cap	\$2.2M / FY
36	Colorado	No Cap	\$2M FY23
37	Nebraska	\$400k	\$1M thru 6/30/25
38	District of Columbia	Discretionary	Discretionary

⁽¹⁾ Local incentives may also be available.

Source: Cast & Crew

A brief view of Georgia, New Mexico and New Jersey’s programs, illustrate the economic benefit and growth potential of the most successful programs:

Georgia

Georgia’s incentive program is uncapped and provides a 20% tax credit with an additional 10% Georgia Entertainment Promotion (GEP) uplift. From 2003 to 2020, membership in the IATSE Studio Mechanics local grew from a mere 191 members to well over 5,000 skilled-technicians. The local also developed program committees offering networking and mentorship opportunities specifically for women, LGBTQ+, and young members. In FY 2022, Georgia reported \$4.4 billion in direct production spend. Currently, there are 4 million square feet of stage space, including Tyler Perry Studios, in Georgia with another 2.9 million square feet under construction.

New Mexico

In 2019, New Mexico passed legislation to increase the annual funding for production tax credits to \$100 million and, more notably, to incentivize production companies to collaborate with the state through long-term partnership agreements, capital investment, workforce development, and job training. Immediately, Netflix announced its commitment to investing \$1 billion over 10 years on soundstages, infrastructure and productions in the State, making New Mexico a hub for Netflix productions. NBCUniversal also committed to developing a soundstage complex and investing \$500 million in the state. In a 2020 article, Deadline reported that direct spend in New Mexico increased from \$7 million in 2003 to \$525.5 million in 2019 and that “Netflix will generate an estimated \$344 million in taxes to the state, local school district, and other



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local governments.”⁹ Netflix also pledged to support the state’s indigenous, Latino, Black and other underrepresented content creators and filmmakers. Additionally, as the incentive program is tied to job creation and development, colleges and universities ramped up their curriculum to meet the job demands of productions coming to New Mexico.

In FY 2022, New Mexico had a record 109 productions with a direct spend of \$855.4 million, a 36 percent increase over FY 2021. According to the film office, the median wage for a full-time film crew member working in New Mexico was \$29.36 an hour, compared with \$18.18 an hour for all other industries. A 2021 study determined that for every dollar in tax credits results in \$8.40 in economic impact in New Mexico. In 2023, New Mexico voted to phase in an increase in the annual funding from \$110 million to \$160 million over the next 4 years; increase the “rural uplift” incentive from 5% to 10%; and extend the expanded tax credit for state “partners” for five years which will allow the newly-established (2023) state media academies to graduate enough skilled-workers to fill the industry’s workforce needs.

New Jersey

In 2018, New Jersey reinstated its production tax incentive program and in 2021 further expanded the program and increased the annual funding cap to \$100 million. As a result, production spending topped \$650 million in 2022 and yielded more than 8,500 jobs. Additionally, private investments will expand the State’s infrastructure and soundstage availability. Netflix is constructing a large studio complex in a former Army facility in Monmouth and Lionsgate has teamed with the state to build a studio and performing arts complex in Newark.

Film and Television in Maryland

The Maryland Film Office, also housed within the Department of Commerce, was established in the 1970s. Maryland first began offering production incentives in 1999 with the passage of the sales and use tax exemption for film production activity. The wage rebate grant program was added in 2005, was amended in 2007 to become the Film Production Rebate Fund, and in 2011 was repealed and replaced with the Maryland Film Production Activity Income Tax Credit. The structure of the film production incentive program has changed over the course of the past 18 years and the funding has fluctuated from a low of \$550,000 in FY 2010 to a high of \$25 million in FY 2014.

In 2018, the Maryland Film Production Activity Income Tax Credit program was amended to:

- (1) reduce the minimum spend for most film projects to \$250,000;

⁹ Deadline, “[Netflix Commits \\$1 Billion More In New Mexico Production Funding As It Expands ABQ Studios; ‘Stranger Things’ Joins List Of Albuquerque-Set Shows](#),” November 30, 2020.



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- (2) limit the maximum amount of tax credits to \$10M per project;
- (3) create a new category of films (MD Small Films) for Maryland small or independent film entities with a minimum spend of at least \$25,000;
- (4) authorize a set aside for MD Small Films of 10% of the annual authorized credit amount; and
- (5) authorize the allocation of \$8M in credits for FY19, \$11M in credits for FY20, \$14M in credits for FY21, \$17M in credits for FY22, and \$20M in credits for FY23 and each fiscal year thereafter.

The 2020 Budget Reconciliation and Financing Act (BRFA) set the authorized amount of credits for FY 2020 and beyond at \$12M. Legislation enacted July 1, 2023, authorized the allocation of \$15M in credits for FY 2024, \$17.5M in credits for FY 2025, \$20M in credits for FY 2026, and \$12M in credits for FY 2027 and each fiscal year thereafter. \$1.5 million has been set aside for Maryland Small Films in FY 2024.

Film Production Activity Tax Credit - Funding by Fiscal Year			
Fiscal Year	Total Funding	For All Other Films	10% for MD Small Films
FY 2012	\$7,500,000.00	n/a	n/a
FY 2013	\$7,500,000.00	n/a	n/a
FY 2014	\$25,000,000.00	n/a	n/a
FY 2015	\$7,500,000.00	n/a	n/a
FY 2016	\$7,500,000.00	n/a	n/a
FY 2017	\$11,510,000.00*	n/a	n/a
FY 2018	\$5,000,000.00*	n/a	n/a
FY 2019	\$8,000,000.00	\$7,200,000.00	\$800,000.00
FY 2020	\$11,000,000.00	\$9,900,000.00	\$1,100,000.00
FY 2021	\$12,000,000.00	\$10,800,000.00	\$1,200,000.00
FY 2022	\$12,000,000.00	\$10,800,000.00	\$1,200,000.00
FY 2023	\$12,000,000.00	\$10,800,000.00	\$1,200,000.00
FY 2024	\$15,000,000.00	\$13,500,000.00	\$1,500,000.00
FY 2025	\$17,500,000.00	\$15,250,000.00	\$1,750,000.00
FY 2026	\$20,000,000.00	\$18,000,000.00	\$2,000,000.00
FY 2027 and beyond	\$12,000,000.00	\$10,800,000.00	\$1,200,000.00

* Film Production Tax Credit Reserve Fund

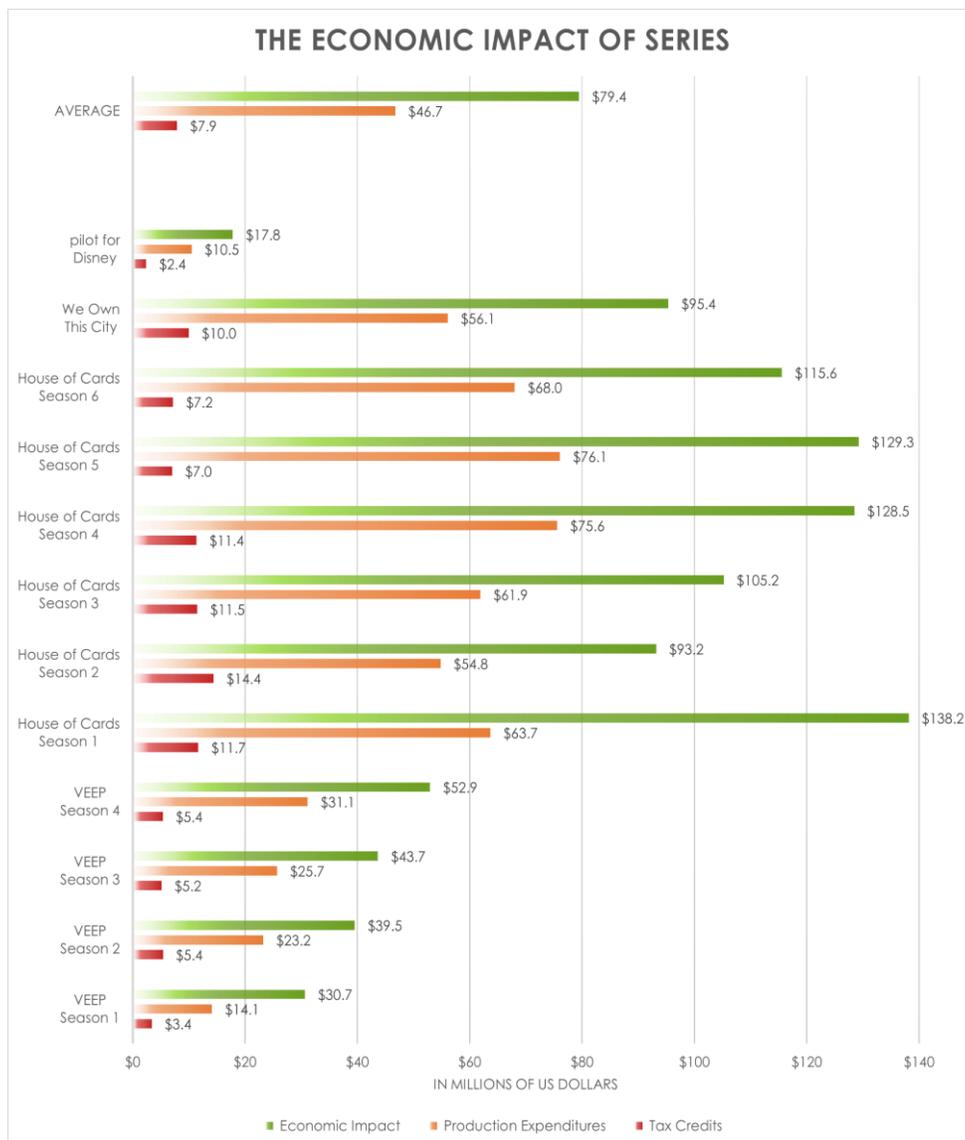
Since its enactment in 2012, the Film Production Activity Income Tax Credit program has provided tax credits to sixteen major productions that directly spent \$561 million in Maryland and had an economic impact of nearly \$1 billion on the State’s Economy. On average, each production hired 1,500 Marylanders as crew and cast and purchased or rented goods and/or services from 1,600 local Maryland businesses per season.



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In the era of incentives, FY 2014 represents the high-water mark for the film industry in Maryland. \$25 million in tax credits were authorized to retain the series *House of Cards* and *VEEP*, the highest funding level for the Film Production Activity Tax Credit since its inception. Those funds secured the second season of *House of Cards* and Seasons 3 and 4 of *VEEP*.

Those two series combined spent more than \$112 million directly into Maryland’s economy generating an economic impact of \$190 million. On average, they hired over 1,600 Marylanders as crew and cast and purchased or rented goods and/or services from over 1,600 Maryland businesses per season. They spent a combined 525 days on-location with 234 days of principal photography. In addition, they secured 21,090 room nights in local accommodations and 34,738 car rental days.





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Two additional series, HBO’s *We Own This City* and a pilot for Disney, have received tax credits since *House of Cards* wrapped production in 2018.

Most recently, the Paramount+ series *Special Ops: Lioness* and the Apple+ limited series *Lady in the Lake* filmed in Maryland in 2022. *Special Ops: Lioness* filmed in eight separate counties including Fort Ritchie in Washington County. While the direct spend, economic impact, number of local Marylanders hired, and number of Maryland businesses utilized by these productions will be determined once the closing financial documents and audit are submitted to Commerce, a preliminary assessment that the direct spend is estimated to be nearly \$200 million with an economic impact greater than \$350 million.

3.3 Gaming, Animation and Emerging Technologies

The Media and Entertainment market is rapidly evolving with games, animation, and emerging technologies leading the charge. The gaming industry, for instance, has seen exponential growth over recent years—reaching nearly \$390 billion in revenues in 2023.¹⁰ Virtual and Augmented Reality are revolutionizing storytelling and viewer experiences in entertainment, offering immersive and interactive content. The advent of 5G and advancements in cloud computing are enabling high-speed, seamless streaming experiences and remote production capabilities.

The convergence of these fields is creating new opportunities for content creation, distribution, and consumption, while also shaping the future landscape of entertainment and beyond. Gaming, Animation and Virtual Reality, for instance, are being used in increasingly diverse sectors including health and education.

For additional perspectives on how today’s digital and emerging technologies can drive a creative economy, Oslberg-SPI, an international creative industries consultancy that specializes in the global screen sector, completed a major study in 2015, “The UK Video Games Sector: A Blueprint for Growth,” which tracked the evolution of the UK games industry since the 1980s. The report outlines “the business models unique to the sector, as well as the creativity and technological innovations that have helped the UK become one of the most successful games exporters in the world.”¹¹

Gaming and Emerging Technologies in Maryland

Maryland is home to pioneers of the computer gaming industry and has a rich history in its development. Sid Meier, recognized as “The Godfather of Gaming,” co-founded MicroProse in

¹⁰ Dun & Bradstreet, [Entertainment & Games Software Industry Profile](#)

¹¹ Oslberg-SPI, [The UK Video Games Sector: A Blueprint for Growth](#)



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1982 and released the legendary game, "Sid Meier's Civilization." MicroProse veterans went on to establish successful companies such as Breakaway Games and Big Huge Games. Bethesda Games is also a globally-recognized gaming company, founded in Bethesda, Maryland.

In addition to successes in computer gaming, Maryland is also home to cutting-edge firms leading the way in the areas of modeling, simulation, and serious games that are used in defense, medical, and training arenas. Maryland higher education institutions such as MICA, University of Baltimore, and UMBC, all offer degrees in Game Design and Development. Johns Hopkins and University of Maryland, College Park are also leading advances in XR and VR-related technology—the former recently unveiled their AI Institute in which more than 100 faculty positions have been created to support and spearhead advances in this field.

While there is limited data available through the Department of Commerce, it is the Council’s view that Maryland is well positioned to seize more than its fair share of the industry’s future potential if its technology sector, and the ecosystems that support it drive commercial interest towards the M&E market.

4.0 Assessment

Further study by the Council and an outside consultant is necessary. That said, based on our initial research there are clear advantages that Maryland has and should leverage as well as significant areas for improvement.

Scenic Diversity, “America in Miniature”

The geographic, topographic, and architectural diversity makes it an ideal location for production, standing in for New York, Washington, D.C., Chicago, London, Paris, and the Middle East, just to name a few. Producers can find a wide variety of looks within a reasonable reach of each other and in close proximity to production “hubs” (zones for cast & crew and available production infrastructure). The scenic diversity of the state ranges from small towns and bucolic countryside as seen in *Runaway Bride*, *Tuck Everlasting*, to post-industrial cities of *The Wire*, *Ladder 49*, and *Meteor Man*. The beauty of Maryland’s waterfront settings are showcased in *Wedding Crashers*, *Ping Pong Summer*, and *Swimmers*. While *Washington Square*, *Gods and Generals*, and *Beloved* all highlight the abundance of historical architecture, *Diner* and the upcoming *Lady in the Lake* put mid-century Maryland architecture on display.

Proximity to Washington, D.C.

Maryland’s proximity to the Nation’s Capital is an important differentiated advantage when it comes to the physical production of major films and television series. As filming in the nation’s capital brings major logistic and cost issues for filmmakers, our proximity allows producers to



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double D.C. here and make day trips to the District only when necessary to film iconic D.C. locations. Examples of Maryland standing in for D.C. include *Special Ops: Lioness*, *House of Cards*, *VEEP*, *Enemy of the State*, *Head of State*, *The Spook Who Sat by the Door*, *Live Free or Die Hard*, *XXX2: State of the Union*, *Absolute Power*, and *The Replacements*, among others.

Accessibility to Major Markets

Quick and direct access to Maryland is provided by three regional, international airports (BWI/Thurgood Marshall, Reagan/National, and Dulles), high-speed train service through the Northeast corridor, and an intersecting network of five major interstates. In addition, the state offers a relatively low cost of living as compared to New York, Los Angeles, and Washington, D.C.

Existing Crew

The trade union, IATSE Local 487, represents Maryland, Virginia, and Washington, D.C. The membership includes most of the skilled-technicians found on a film crew, or on a theater stage crew. Presently, there are 1,037 members of which 511 are Maryland residents.

The Washington Mid-Atlantic SAG/AFTRA local presently has 5,370 members, 2,035 of which are Maryland residents. In 2013, the total was 5,083 with 1,998 residing in Maryland. This SAG-AFTRA local covers members in Washington, D.C., Maryland, Virginia, North Carolina, and West Virginia.

Workforce Potential

There are 824 post-secondary certificates, undergraduate and graduate degrees offered at the state’s nearly 200 public and career schools in Maryland that are specific to film, radio, TV, and arts and entertainment. MICA, University of Baltimore, and UMBC, all offer degrees in Game Design and Development. Every year, students graduate from Maryland institutions with degrees in fields of study within the entertainment industry. Some are able to establish their careers in Maryland within the creative arts. The establishment of a well-funded, supportive Arts Council has enabled the arts and culture community to thrive. An abundance of businesses in digital and emerging technology has provided a pipeline for post graduation jobs in these fields. Many, however, in particular those trained in film/television production, must look elsewhere for meaningful employment opportunities. Maryland’s creative and highly-skilled filmmaking talent is relocating to those States that offer an option for a lifelong career.



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Brand Equity of Talent

Maryland has brand recognition for talent in the creative industries, locally, nationally and internationally - filmmakers such as John Waters, Barry Levinson, David Simon, and Mike Flanagan; studio executives such as Tom Rothman, Scott Tenley, and Mark Platt; actors such as Edward Norton, Moses Ingram, Nicole Ari Parker, Taraji P. Henson, Roc Dutton, Jada Pinkett Smith, Julie Bowen and Josh Charles; musicians such as Toni Braxton, Tori Amos, David Byrne, Tupac, Dan Deacon, and Future Islands; designers such as Christian Siriano and Bishme Cromartie; food stars such as brothers Bryan and Michael Voltaggio and Duff Goldman; authors such as Ta-Nehisi Coates, Laura Lippman, and Anne Tyler; and last, but certainly not least, Sid Meier founder of MicroProse and Firaxis, and ranked as one of the "Most Influential People of All Time in Computer Gaming."

Leadership in the Arts

Maryland boasts 320+ organizations across the state offering arts programming; 250+ community-based projects through Creativity, Public Art Across Maryland, and Maryland Traditions grants; 100+ teaching artist engagements in schools and community settings; 200+ artists’ working and living expenses through a new Grants for Artists program; 30+ engagements of Maryland performing artists at Maryland venues; and, 50+ professional development opportunities for artists.

Twenty-four county arts agencies with \$5 million in general operating support provide funding and arts programming locally in every Maryland county and Baltimore City. Maryland's twenty-nine A&E Districts help develop and promote community involvement, tourism, and revitalization. They are unique destinations, attracting audiences, artists, arts organizations, and other creative enterprises to specific neighborhoods in Maryland’s towns and cities. Each reflects the traditions and evolving culture of its community and invites residents and visitors to experience the best Maryland has to offer.

Uncompetitive Tax Incentive

Incentives play a crucial role in the global film and television industry, influencing where productions are filmed and how they are financed. They vary widely across different countries and regions, reflecting local economic goals and cultural policies. In addition to physical production incentives, states and countries have introduced a myriad of diverse incentives to support post-production, specific mediums such as Animation or Game development, workforce development and training, infrastructure development, or location-specific incentives to bolster activity in rural locales.



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As mentioned, 38 states offer some form of film and television incentives. Maryland’s incentive currently ranks 26th. If Maryland is serious about increasing the economic impact of the film, television and entertainment industry, it will have to increase its incentive program. That said, any increase should be met with an eye towards sustainability.

Lack of Infrastructure

One area of infrastructure that is lacking in Maryland is soundstage/studio space dedicated for the use of filming. While the State has had success in the past with utilizing available warehouses to retrofit as a soundstage, it has become increasingly difficult to locate appropriate space for the needs of production.

5.0 Use of Existing Assets and Need for Additional Investments

As discussed in previous sections, Maryland offers a wide variety of existing State offices, commissions, and programs that can be utilized to advance the State’s film, television, and entertainment industry. Further study will expand the catalog of existing State assets, but particular attention should be paid to the following:

Maryland State Art Council (MSAC) and Maryland Film Office (MFO)

The role of the MSAC and MFO have been discussed in previous sections of this report and are housed within the Department of Commerce. That said, there are a myriad of other government agencies on a local level that work to support Maryland’s creative economy—and with whom the Council should collaborate. As described in the previous section, there are twenty-four county arts agencies providing funding and arts programming locally, along with twenty-nine A&E Districts offering support and technical assistance. In addition to the state film office, there are two other dedicated film offices - the Baltimore Film Office and the Prince George’s Film Office. There are twenty-five Destination Marketing Organizations (DMOs) across the state that work on a local level to promote their area or regions.

Departments of Commerce, Housing and Community Development, and Labor

By expanding the Maryland Entertainment Council to include cabinet secretaries or their designees, specifically, the Secretaries of Commerce, Housing and Community Development, and Labor, the Maryland Economic Council can guide the State’s incentive program to drive higher labor force participation of Marylanders as well as greater investment in Maryland infrastructure and small business. Maryland must avoid what is too frequently the case in many states across the nation: a local film and television economy that imports its workforce, infrastructure, and business ecosystem instead of developing and leveraging from within.



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Intersection of Technology and Entertainment

Maryland should partner with its tech sector to unleash its entrepreneurs and technology businesses in the emerging segments of the M&E market. Animation, gaming, and virtual productions and other emerging technologies will drive outsized growth in the industry in the decades ahead. Maryland is well positioned to seize more than its fair share of the industry’s future potential if its technology sector, and the ecosystems that support it drive commercial interest towards the M&E market. Furthermore, Maryland can also align its current investments to the growing segments of the M&E markets by ensuring that anchors such as TEDCO bring a sophisticated M&E lens to its work.

6.0 Recommendations

From its initial assessment, the Maryland Entertainment Council is confident that the state is uniquely positioned to capitalize on the major shifts currently underway across the Media and Entertainment Industry because of our geographic diversity, strength and potential of our workforce, world-class institutions and leadership in the arts. With the right leadership and strategic investments, Maryland can leapfrog from middling to national leader in this important industry. To do so, the Maryland Entertainment Council is making the following initial recommendations:

- **The State of Maryland should hire a consultant to examine all tax incentives that specialize in media and entertainment, both nationally and globally.** There are 38 states with an incentive program, and dozens more throughout the world, all pursuing different strategies with varying degrees of success. As the industry undergoes its most significant disruption since the introduction of streaming, the competitive landscape for these programs is also in flux. In order for Maryland to emerge as a national leader in the M&E industry, the State must thoroughly understand the business trends, map Maryland’s assets to the opportunities it is best positioned to seize and avoid strategies that represent a “race to the bottom.” A modest investment in research and analysis will pay outsized dividends as the State competes to “win the decade” in this industry.
- **The Maryland Entertainment Council should expand its membership.** It currently includes national industry, labor, and creative leaders who share the Moore-Miller Administration’s values and believe in Maryland’s potential to uniquely contribute to the M&E market while deriving impact for local economies and workforces. However, there is more potential for the Maryland Entertainment Council to capture. By expanding the Maryland Entertainment Council to include cabinet secretaries or their designees, the Maryland Economic Council can guide the State’s incentive program to drive higher labor force participation of Marylanders as well as greater investment in Maryland infrastructure and small business. Maryland must avoid what is too frequently



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the case in many states across the nation: a local film and television economy that imports its workforce, infrastructure, and business ecosystem instead of developing and leveraging from within.

- **Maryland should partner with its tech sector to unleash its entrepreneurs and technology businesses in the emerging segments of the M&E market.** Animation, gaming, and virtual productions and other emerging technologies will drive outsized growth in the industry in the decades ahead. Maryland is well positioned to seize more than its fair share of the industry’s future potential if its technology sector, and the ecosystems that support it drive commercial interest towards the M&E market. Furthermore, Maryland can also align its current investments to the growing segments of the M&E markets by ensuring that anchors such as TEDCO bring a sophisticated M&E lens to its work.
- **Align Maryland’s current investments in the arts and culture to its strategy to build a competitive M&E industry across the state to further elevate Maryland’s national and global brand position, strengthen its cultural exports, and ensure the sustainability of local artists and creatives.** Today, Maryland spends the second most on the arts and culture per capita of any state in the nation. Despite this fact, many artists and creatives struggle to sustain their livelihoods and are disconnected from the larger commercial opportunities in the sector, beginning with media and entertainment. The Maryland Entertainment Council will explore a collaboration with the world-class leaders within the Maryland Arts Council to identify opportunities for partnership and investment to begin bridging this disconnect. Maryland can look internationally for inspiration: Canada, the United Kingdom, and South Korea all have robust programs that invest in indigenous creative talent before exporting their contributions, globally, through the M&E market; Maryland has a local tradition too: John Waters, David Simon, and Barry Levinson all adapted regional stories and culture for a global audience. With the right program design and support, Maryland can intentionally pursue this strategy both equitably and competitively, to further cement its global reputation as an epicenter of arts and culture.

The discovery, recommendations and facets in this interim report represent preliminary findings that will help drive the focus of the Council moving forward. As mentioned, there is still a lot of work ahead and per the statute the Council will address the following in a final report to be delivered on or before September 1, 2024, to the Governor and Secretary of Commerce. Those threads of inquiry include the following:

1. a clear definition of Maryland’s creative and competitive profile;
2. an assessment of Maryland’s existing infrastructure, creative profile, and core structural advantages that the State is uniquely positioned to leverage;



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3. recommendations on how to best utilize existing State offices, commissions, and programs to advance Maryland’s film, television, and entertainment industry and what, if any, additional investments should be made to support these State functions;
4. recommendations to measure the economic impact of additional investment in the film, television, and entertainment industry;
5. recommendations regarding the expansion of eligibility for film production incentives, including with respect to live to tape events, and the potential economic impact from that expansion;
6. recommendations to strengthen the structure and funding of the State’s existing film and theatrical production incentives to ensure a greater return on investment on Maryland’s investment in the film, television, and entertainment industry;
7. recommendations for additional State investment to bolster identified specialties and high-leverage growth opportunities in the film, television, and entertainment industry;
8. recommendations to support and grow Maryland’s independent creative community and incentivize export promotions of Maryland-based talent;
9. methods to bolster film–, television–, and entertainment–related business development and identify potential industry partnerships;
10. methods to sustainably grow the film, television, and entertainment workforce and identify potential workforce development and higher education partners; and
11. other recommendations, as appropriate, to support and grow the economic impact of Maryland’s film, television, and entertainment industry.



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Appendix A – Text of Statute Establishing Council

Film Production Activity Income Tax Credit and Maryland Entertainment Council

(a) There is a Maryland Entertainment Council.

(b) (1) Subject to paragraph (2) of this subsection, the Council consists of:

- (i) one member of the Senate of Maryland, appointed by the President of the Senate;
- (ii) one member of the House of Delegates, appointed by the Speaker of the House;
- (iii) the Governor’s appointed Senior Advisor on Film, Television, and Entertainment;

and

(iv) the following members, appointed by the Governor:

- 1. one expert in the business of the film, television, and entertainment industry, such as an executive, producer, studio representative, or an individual holding a leadership role within the industry;
- 2. one expert in workforce development or higher education related to the film, television, and entertainment industry;
- 3. one expert in emerging technologies or specialties of the film, television, and entertainment industry, such as an expert in gaming, artificial intelligence, visual effects, animation, post-production, or another related specialty;
- 4. one expert in legal or policy fields specific to the film, television, and entertainment industry;
- 5. one representative of the independent film and television community; and
- 6. one representative of nongovernmental entities or philanthropic institutions that support film, television, or entertainment directly or creative economies more broadly.

(2) The Governor may appoint up to three additional individuals as honorary cochair of the Council who are:

- (i) individuals with extraordinary cultural capital and commanding significant influence within the film, television, and entertainment industry;
- (ii) business leaders commanding a significant stake within the film, television, and entertainment industry; or
- (iii) individuals who have defined the current cultural brand of the film, television, and entertainment industry within the State.

(3) An individual appointed as an honorary cochair of the Council shall be a nonvoting member of the Council whose responsibilities shall be limited to the promotion and business development of Maryland’s film, television, and entertainment industry.

(c) The Senior Advisor on Film, Television, and Entertainment shall chair the Council.

(d) The Department of Commerce shall provide staff for the Council.

(e) A member of the Council:

- (1) may not receive compensation as a member of the Council; but
- (2) is entitled to reimbursement for expenses under the Standard State Travel Regulations, as provided in the State budget.



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(f) The Council shall:

(1) assess Maryland’s existing assets, opportunities, and competitive position within the film, television, and entertainment industry;

(2) study:

(i) Maryland’s State, local, and private assets that currently support Maryland’s film, television, and entertainment industry, including key infrastructure, existing workforce, workforce pipelines, scenic profile, emerging specialties, and independent creative communities;

(ii) existing State programs, agencies, offices, grant programs, and commissions across State agencies that support the film, television, and entertainment industry;

(iii) models, competitive profiles, methods, and legislation that states have utilized to incentivize necessary infrastructure and workforce to support the film, television, and entertainment industry;

(iv) industry needs, disruptive trends, and emerging technologies within the film, television, and entertainment industry; and

(v) complementary industries, aligned businesses, and potential corporate, philanthropic, and other partners for the film, television, and entertainment industry; and

(3) make recommendations on the development of a coordinated, comprehensive strategic plan to position Maryland as an emerging leader in the film, television, and entertainment industry.

(g) On or before December 1, 2023, the Council shall submit a preliminary report to the Governor, the Secretary of Commerce, and, in accordance with § 2-1257 of the State Government Article, the General Assembly that includes:

(1) an assessment of Maryland’s existing infrastructure, creative profile, and core structural advantages that the State is uniquely positioned to leverage;

(2) recommendations on how to best utilize existing State offices, commissions, and programs to advance Maryland’s film, television, and entertainment industry and what, if any, additional investments should be made to support these State functions;

(3) a clear definition of Maryland’s creative and competitive profile; and

(4) recommendations to measure the economic impact of additional investment in the film, television, and entertainment industry.

(h) On or before September 1, 2024, the Council shall submit its final report to the Governor, the Secretary of Commerce, and, in accordance with § 2-1257 of the State Government Article, the General Assembly on:

(1) the matters included in the Council’s preliminary report;

(2) recommendations regarding the expansion of eligibility for film production incentives, including with respect to live to tape events, and the potential economic impact from that expansion;

(3) recommendations to strengthen the structure and funding of the State’s existing film and theatrical production incentives to ensure a greater return on investment on Maryland’s investment in the film, television, and entertainment industry;



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(4) recommendations for additional State investment to bolster identified specialties and high-leverage growth opportunities in the film, television, and entertainment industry;

(5) recommendations to support and grow Maryland’s independent creative community and incentivize export promotions of Maryland-based talent;

(6) methods to bolster film–, television–, and entertainment–related business development and identify potential industry partnerships;

(7) methods to sustainably grow the film, television, and entertainment workforce and identify potential workforce development and higher education partners; and

(8) other recommendations, as appropriate, to support and grow the economic impact of Maryland’s film, television, and entertainment industry.

Approved by the Governor, May 8, 2023.



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Appendix B–Measurable Objectives

Recommendations on the best manner to measure the economic impact of additional investment in the film, television, and entertainment industry vary across the country and the world. It is for this reason that the Council recommends hiring an outside consultant that specializes in this type of economic analysis. In the meantime, included below are the metrics that the Department of Commerce currently tracks.

Commerce currently reports on the following measurable objectives:

The Maryland State Arts Council reports annually on the following:

- 1) Gross sales by Maryland non-profit arts industry
- 2) Total number of jobs (FTE) supported by non-profit arts industry
- 3) Grants for Organizations (GFO) - matching funds
- 4) Community Arts Development (CAD) - matching funds
- 5) Number of attendees at arts events supported by MSAC
- 6) Individual Artists program – number of participants
- 7) Maryland Traditions Folklife program – institutions served
- 8) State and local taxes generated by Maryland non-profit arts industry
- 9) Arts organizations payroll
- 10) Per capita arts investment
- 11) Number of schools served
- 12) Number of children served through performances/residencies
- 13) Number of teaching artists and organizations on MSAC Teaching Artist Roster

The Maryland Film Office reports annually on the following:

- 1) the number of film production entities submitting applications;
- 2) the number and amount of tax credit certificates issued;
- 3) the number of local technicians, actors, and extras hired for film production activity during the reporting period;
- 4) a list of companies doing business in the State, including hotels, that directly provided goods or services for film production activity during the reporting period;
- 5) any other information that indicates the economic benefits to the State resulting from film production activity during the reporting period;
- 6) the direct spend of the production activity in the State; and



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- 7) using a multiplier of 1.7 calculated by Implan, the economic impact of that direct spend on Maryland’s economy.¹²

Additionally, Commerce has previously participated in economic studies on the impact of the Arts and Film/Television Production in Maryland. Some of the findings from those reports are shared below.

The Arts

Annual reports by Commerce’s Office of Research calculate the economic impact of the arts organizations and county arts agencies supported by MSAC’s two largest grant programs. Pre-pandemic, MSAC’s 300+ grantee organizations in these programs created around \$1.2 billion in total economic activity annually, supporting 14,600 jobs and generating close to \$50 million in state and local taxes on average.¹³ FY 2020-2021 showed a steep decline during the height of the pandemic. FY 2022’s report shows signs of recovery with an \$800 economic impact, 8,058 jobs and \$20 million in state and local taxes generated.¹⁴

MSAC commissions the Regional Economic Studies Institute (RESI) at Towson University annually to conduct economic footprints analyses of the state’s Arts & Entertainment Districts. The most recent completed study for FY 2022, shows the 27 districts reporting supported approximately 1,185 jobs, \$149.5 million in state GDP, and nearly \$45.7 million in employee compensation from net business growth and event and festival attendee spending.¹⁵

Film / Television Production

In 2014, the RESI completed a study, “Economic and Fiscal Impacts of the Film Production Activity Tax Credit in Maryland,”¹⁶ comparing tax credits claimed with tax revenues generated to determine the ROI of the film tax credit program between 2012 and 2015. The study concluded that:

- For every dollar claimed in film tax credits, \$1.03 is returned to the State in total additional taxes.
- Every dollar claimed in film tax credits generates an additional \$3.69 in economic output.

¹² The [Maryland Film Production Activity Tax Credit Annual Report for FY 2022](https://marylandfilm.org/ReportsArticles) and all other fiscal years are available at <https://marylandfilm.org/ReportsArticles>.

¹³ MSAC economic impact reports available at www.msac.org/resources/publications

¹⁴ Economic Impact of the Arts in Maryland: FY 2022, Maryland Department of Commerce, Office of Research

¹⁵ RESI, FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis available at www.msac.org/programs/arts-entertainment-districts

¹⁶ RESI, “[Economic and Fiscal Impacts of the Film Production Activity Tax Credit in Maryland](https://marylandfilm.org/ReportsArticles).” The full report is available at <https://marylandfilm.org/ReportsArticles>.



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In 2010, the Sage Policy Group authored the study, “An Economic Assessment of Maryland’s Film & Television Production Industry and Policy Implications.”¹⁷ They reported:

- Nationally jobs in the industry pay 77 percent more than the typical job.
- The industry provides an extra employment bonus— for every Maryland film industry job, the industry supports on average an additional 1.26 jobs.

To date, Commerce has not included the impacts of “Film Induced Tourism” in its return on investment (ROI) reporting on the film industry in Maryland. At the time a production activity concludes in the State, no data exists regarding the impact said production may have on tourism. The 2014 RESI study touched on the impacts noting that travelers were visiting Berlin because of *Runaway Bride* and weddings were being booked at the Inn at Perry Cabin because of *Wedding Crashers*. According to Stefan Roech, film tourism expert and Director of FilmQuest, in 2018 following the success of *Game of Thrones*, Ireland saw \$US 50 million in *Game of Thrones* tourism spending. Studies testifying to the impact of film induced tourism have been done elsewhere in the US, as well as internationally. For example, Olsberg-SPI also completed a study entitled “Quantifying Film and Television Tourism in England.”¹⁸

Along the same lines and should be noted as well is the advertising value equivalency (AVE) of domestic and international printed and televised press or social media stories that spotlight Maryland. Examples include stories in the international press about *House of Cards* filming in Harford County, Julia Louis Dreyfus (*VEEP*) tweeting that she “loves Maryland” to her 600,000 followers, or Jane Fonda (*Better Living Through Chemistry*) blogging about how charming Annapolis is and that “people must visit.”

¹⁷ Sage Policy Group, “[An Economic Assessment of Maryland’s Film & Television Production Industry and Policy Implications](https://marylandfilm.org/ReportsArticles).” The full report is available at <https://marylandfilm.org/ReportsArticles>.

¹⁸ Olsberg-SPI, “[Quantifying Film and Television Tourism in England](#).”