

Comprehensive Impact Analysis of the Freeman Arts Pavilion



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Comprehensive Impact Analysis of the Freeman Arts Pavilion

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For the
Joshua M. Freeman Foundation

All photos courtesy of the Joshua M. Freeman Foundation



Preface

As the director of the University of Delaware's Institute for Public Administration (IPA), I am pleased to present the Comprehensive Impact Analysis of the Freeman Arts Pavilion. Funded by the Joshua M. Freeman Foundation, this report details the results of an IPA analysis of the economic impacts of the Freeman Arts Pavilion's programming from 2008 to 2022. Included within are quantitative estimates of the employment and spending contributions that the Freeman Arts Pavilion makes to Sussex County, Delaware. Whether based on the results of detailed economic models or survey responses, the Freeman Arts Pavilion makes a significant impact to Sussex County's economic and cultural landscape, and its programming is greatly appreciated by patrons and community partners.

IPA is committed to supporting community and economic development efforts that enhance the quality of life for existing Delawareans and make the state more attractive for visitors and future residents—a description that certainly fits the bill for the Freeman Arts Pavilion's programming. I appreciate the opportunity for IPA to support the Freeman Arts Pavilion's efforts with this data-driven analysis of economic and cultural vitality impacts, and I hope that this study serves as a useful framework for the Joshua M. Freeman Foundation to broaden and enhance the impacts of its programming over time.

Jerome R. Lewis, Ph.D.

Director, Institute for Public Administration

Acknowledgments

I offer my sincere thanks to the Joshua M. Freeman Foundation and the Freeman Arts Pavilion team for choosing to engage with IPA to update, refine, and expand upon a 2019 study of impacts resulting from activities at The Freeman Stage. This updated study clearly demonstrates the significant economic and cultural dividends that have come from the Joshua M. Freeman Foundation's steadfast commitment to "creating opportunities that elevate the human spirit" through Freeman Arts Pavilion performances and programs. Thank you to the Freeman Arts Pavilion team—Melissa Donnelly, Patti Grimes, Lindsay Richard, and Darren Silvis—for providing the key ingredients of data, context, and encouragement needed to complete this study.

IPA Fellow Reidel Vichot played several key roles in the production of this study, including taking the lead on the analysis of cultural vitality trends presented within, developing and administering the survey instrument, and leading in the preparation of data and methods for the economic impact components of the study. This report could not have been completed without his contributions.

Finally, IPA staff member Sarah Pragg provided her usual, indispensable editing, design, and formatting assistance. Any remaining errors are mine alone.

Troy Mix

Associate Director, Institute for Public Administration



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Executive Summary

Driven by ticket sales, contributions, and spending by visitors to Sussex County, Delaware, for performances, **Freeman Arts Pavilion supports approximately \$18 million in annual spending across the Sussex County economy.** The Freeman Arts Pavilion's nearly \$9 million annual budget spurs direct spending by visitors to Sussex County of approximately \$2.2 million annually, with this activity resulting in ripple effects of approximately \$6 million in sales and \$2 million in wages across businesses in the county. **As of 2022, each dollar Freeman Arts Pavilion spends results in \$2.12 of economic activity in Sussex County.**

As listed in Table 1, **at least \$7.2 million out of the \$18 million in annual spending across the Sussex County economy represents new money that would not otherwise be in Sussex County without Freeman Arts Pavilion and its programming.** The \$7.2 million in net impacts on output in Sussex County represent sources

such as tourists enticed to Freeman Arts Pavilion from outside Delaware or residents who decided to spend on entertainment locally rather than spend their money outside Sussex County.

Since beginning performances in 2008, **economic contributions and impacts resulting from the Freeman Arts Pavilion have grown steadily from roughly \$2 million in sales in 2008 to nearly \$18 million in 2022. Cumulatively, the economic contributions and impacts during this 15-year period total over \$101 million.** Ticket sales and visitors are the primary drivers of increased impacts. Figure 1 charts this path of continued growth—with a trend of increasing impacts on the Sussex County economy over the last 15 years.

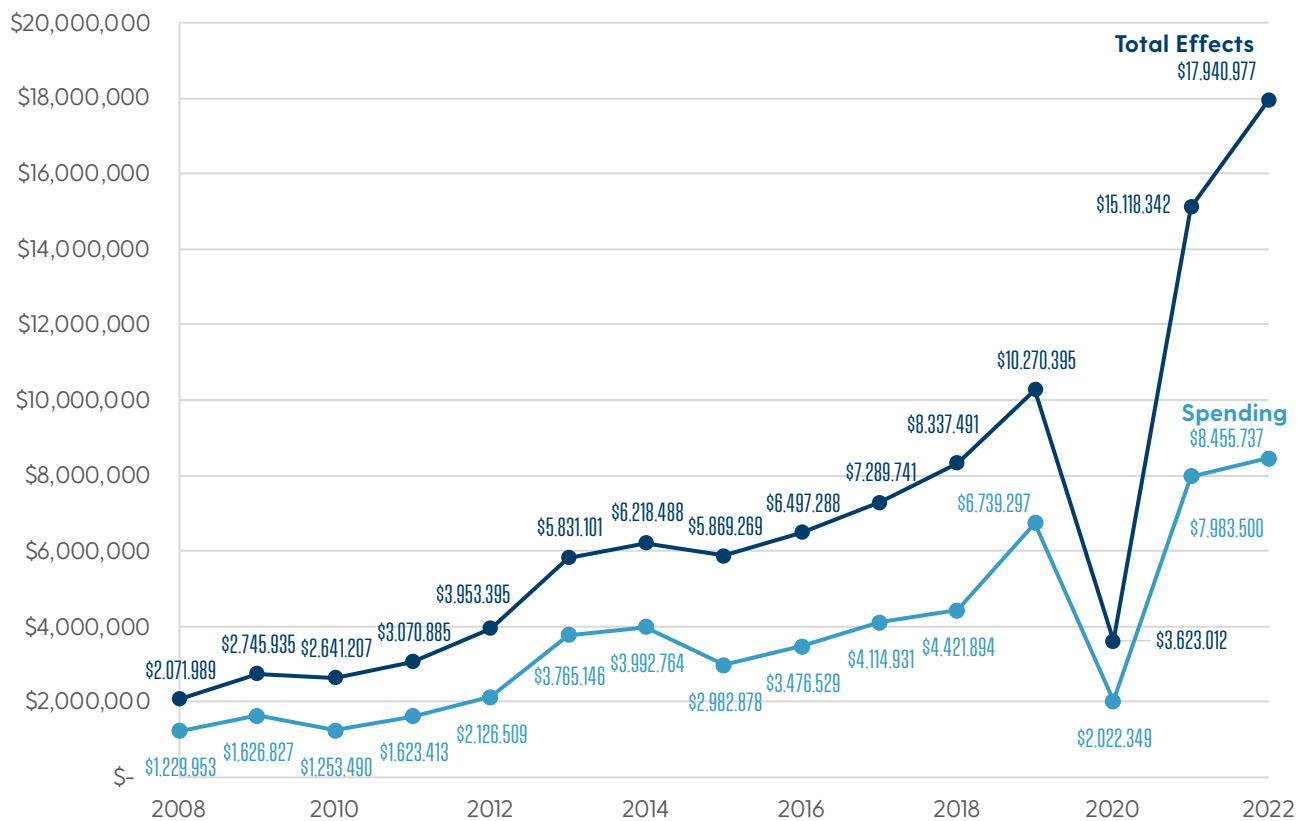
Apart from economic impacts, **this study revealed patrons of Freeman Arts Pavilion are highly engaged and recognize the venue as a unique and valuable cultural asset for Sussex County and the region.**

Table 1. Summary of Freeman Arts Pavilion's Gross Contributions and Net Impacts on Employment and Business Activity in Sussex County, 2022

Contribution Type	Employment	Labor Income (\$)	Output (\$)
Direct Effect	62.20	3,046,411	11,866,424
Pavilion Sales	31.00	1,951,616	9,146,715
Visitor Spending	26.12	880,705	2,241,381
Food Trucks	3.96	130,770	269,319
Construction	1.12	83,320	209,009
Indirect Effect	19.72	1,217,639	3,832,991
Induced Effect	13.66	692,263	2,241,561
Total Contribution	95.58	4,956,313	17,940,977
Net Impact	53.26	1,886,707	7,226,576

Sources: IMPLAN 2021 Data and Model; Freeman Arts Pavilion budget and expenditures detail, 2022; Freeman Arts Pavilion Attendee Survey, 2022. Note: All dollar values presented in inflation-adjusted 2022 dollars.

Figure 1. Freeman Arts Pavilion's Gross Contributions to Economic Output in Sussex County, 2008–2022



Sources: IMPLAN 2021 Data and Model; Freeman Arts Pavilion budget and expenditures detail, 2008–2022; Freeman Arts Pavilion Attendee Survey, 2022. Note: All dollar values presented in inflation-adjusted 2022 dollars.

A series of surveys of approximately 3,647 ticket buyers yielded a 42 percent response rate—highly favorable for studies of this kind—with more than 90 percent agreeing or strongly agreeing that Freeman Arts Pavilion “provides arts and cultural entertainment that would be missing otherwise.” More than 91 percent of respondents agreed or strongly agreed that “Freeman Arts Pavilion creates opportunities for positive social interactions in the community,” “enhances the sense of community in southern Delaware,” and “increases awareness of and participation in the arts.”

Particularly important for a rapidly growing region, Freeman Arts Pavilion provides access to arts and cultural activities for Sussex County residents drawn from all age groups and economic strata. As part of Freeman Arts Pavilion’s Arts Access Initiative, which seeks to provide everyone—regardless of their financial status—with access to the arts, more than 40 percent of performances are free to the public. The Arts in

Education program serves K–12 students throughout the year, with 25,951 students reached during 2022. With growing evidence of the broad educational value of exposure to the arts, this initiative of the Freeman Arts Pavilion may prove to be its most significant and long-lasting impact to the Sussex County community.¹

The first 15 years of performances at Freeman Arts Pavilion have brought steadily increasing economic activity and impact levels, along with an ever-broadening program reach—both to underserved communities in Sussex County and to the surrounding region. In summary, the economic and non-economic analyses conducted for this study provide conclusive support for asserting that **Freeman Arts Pavilion has stamped itself as a destination for cultural tourists; a source of considerable economic activity for Sussex County; and a significant educational and quality of life asset for area residents of all ages and backgrounds.**



Introduction

The Joshua M. Freeman Foundation commissioned this study to assess the economic and non-economic impacts of programming at the Freeman Arts Pavilion since its establishment in 2007. Freeman Arts Pavilion is an outdoor performing arts venue near Fenwick Island, Delaware. It first opened in the summer of 2008 as a program of the Joshua M. Freeman Foundation, which was established to honor the memory of Josh Freeman, the former Chair of the Carl M. Freeman Foundation and Carl M. Freeman Companies.

Program Overview

The Joshua M. Freeman Foundation's mission is "advancing arts access for all through performance, education and advocacy." Acting on this mission, Freeman Arts Pavilion provides unique arts experiences through a diverse range of dance, music, theatre, and children's programming. The foundation's vision, "transforming lives through the arts," is reflected in the more than 65 diverse performances held during the 2022 season. Patronage to Freeman Arts Pavilion performances experienced rapid growth over the first 15 seasons, with 9,464 visitors in 2008 and 92,060 visitors in 2022.

Freeman Arts Pavilion provides diverse artistic performances to residents, children, and visitors of the region. Since 2008, the Freeman Arts Pavilion presents a mix of free and paid performances that spans a multitude of genres including dance, theatre, symphonic, opera, and jazz. Paid performances at Freeman Arts Pavilion in 2022 included more than 20 nationally recognized artists such as Il Divo, Patti LaBelle, John Fogerty, Elvis Costello & The Imposters, and The Original Wailers featuring Al Anderson. Community-driven shows with free admission included Terrance Simien & the Zydeco Experience, the First State Ballet Theatre, the Delaware Army National Guard Band, and University of Delaware Music Spectacular, among others.²

The Arts Access Initiative provides everyone, regardless of their financial status, access to the arts. This initiative consists of four programming elements: the Young Audience Series, free programming, the Arts in Education Program, and the Community Access Program. The Arts Access Initiative primarily serves children, families, and underserved populations with limited financial resources. Annually, over 35 percent of all Freeman Arts Pavilion performances are free to attend. Partnering with all Sussex County school districts, the Arts in Education program brings the arts to K–12 students through a layered approach supporting curriculum standards. Through the Arts in Education Program, the Joshua M. Freeman Foundation aims to provide Sussex County children with four free arts education experiences during their K–12 schooling. In 2022, Arts in Education programming consisted of 30 theatre, music, and dance performances that reached 25,951 students drawn from 13 school districts in Delaware and Maryland.

Overview of Study Scope and Methodology

The University of Delaware's Institute for Public Administration (IPA) designed and conducted this study to estimate and detail the economic impacts resulting from performances and programs delivered by the Freeman Arts Pavilion from 2008 to 2022. IPA gathered and analyzed data to address the following main question:

What level of economic activity in Sussex County is supported by programs delivered by the Freeman Arts Pavilion?

Modeling Freeman Arts Pavilion's Economic Contributions

IPA used IMPLAN—an economic impact modeling software package—to estimate the economic activity supported by Freeman Arts Pavilion. IMPLAN is an input-output model of economic activity, so named because it is based on inter-industry relationships defined by an individual company's purchasing inputs (e.g., office paper, fuel for vehicle fleets) from other companies to produce its outputs (e.g., performing arts events, accounting services, manufactured goods such as furniture or automobiles).³

Starting with information on an initial direct effect—a change or activity being modeled, such as ticket sales in the case of Freeman Arts Pavilion—analysts can use IMPLAN to model how these changes ripple through the economy to create indirect and induced effects. Indirect effects represent spending on local goods and services as a result of the direct effect.⁴ For instance, Freeman Arts Pavilion's expenditures on goods and services necessary to host performances are indirect effects of the ticket sales. Induced effects represent the impact resulting from the local spending of increases in household income created by the direct effect.⁵ The Freeman Arts Pavilion raises local incomes both directly by employing staff and indirectly by supporting the hiring of staff at other local businesses to provide goods and services to Freeman Arts Pavilion. In this example, induced effects represent the total local spending resulting from changes in household incomes driven by Freeman Arts Pavilion's activities.

Patronage to the Freeman Arts Pavilion performances experienced rapid growth over the first 15 seasons, with 9,464 visitors in 2008 and 92,060 visitors in 2022.

Using built-in data on local economic activity and inter-industry and household spending patterns, IMPLAN can estimate the impacts resulting from direct effects with little analyst intervention needed beyond inputting the extent of the direct effect. However, such a hands-off approach to analysis runs the risk of masking key assumptions or relying on inaccurate data to quickly arrive at a final number that satisfies the client demand for an economic impact number.⁶

In contrast to the hands-off approach to analysis that defers to IMPLAN model data and assumptions, IPA relied upon generating and collecting detailed data in three categories to carefully calibrate the IMPLAN model and arrive at defensible, realistic estimates of Freeman Arts Pavilion's total contributions to Sussex County's economy:

1. Freeman Arts Pavilion's revenues and expenditures;
2. Ticket sales by state and county of residence; and
3. Average spending at Freeman Arts Pavilion and in Sussex County while attending a performance, by attendee type.

Using these data, IPA developed estimates of total economic contributions and net economic impacts attributable to Freeman Arts Pavilion activities from 2008 to 2022.⁷ Often conflated with one another, net economic impacts represent a subset of the total economic contributions resulting from a particular direct effect. An economic contributions analysis focuses on tracking the total economic activity generated by a direct effect. By contrast, a net economic impact analysis focuses on determining and reporting only those economic activities that are truly "new" to the local economy because of the direct effect. Activities are not new if they simply substitute one type of spending for

another type that would have occurred in the absence of the direct effect. For example, local resident spending at a new baseball stadium should not all be counted as "new" spending since at least some of this activity simply substitutes spending on baseball tickets and concessions in place of previous spending on existing entertainment venues such as movie theaters.

IPA completed both an economic contributions analysis and a net economic impact analysis for this study. The economic contributions analysis estimates the total direct, indirect, and induced economic activity in Sussex County that is supported by Freeman Arts Pavilion expenditures and the expenditures of visitors to the Freeman Arts Pavilion both at performances and during their visits to Sussex County. Using data on attendance by state and county, survey results on visitor spending and purpose of visit, and literature on economic impact study best practices, the net economic impact analysis conservatively estimates those economic activities that were unlikely to have occurred without the presence of the Freeman Arts Pavilion and its programming.

Assessing the Cultural Vitality Impacts of Freeman Arts Pavilion

IPA used survey data and publicly available data on arts and culture activity and participation to assess Freeman Arts Pavilion's impacts on the cultural vitality of Sussex County. Framed by the approach used in the Urban Institute's 2006 "Cultural Vitality in Communities: Interpretations and Indicators" report, this analysis focused on tracking the presence of, participation in, and support for arts and culture offerings in Sussex County from 2007 to 2022. IPA gathered and analyzed related data on the Freeman Arts Pavilion to assess how the Pavilion's programming may contribute to these cultural vitality conditions.

Key Data Sources

IPA relied upon gathering and analyzing the following significant data:

- IMPLAN 2021 data and model
- Freeman Arts Pavilion expenditures and revenues by detailed source, 2008–2022 (provided by Freeman Arts Pavilion and summarized in publicly available annual reports)
- Data on number and proportion of out-of-state ticket buyers by year, 2014–2022 (provided by Freeman Arts Pavilion)
- Data on in- and out-of-county vendor spending by Freeman Arts Pavilion, 2022 (provided by Freeman Arts Pavilion)
- Data sources on cultural vitality as suggested by the Urban Institute’s 2006 “Cultural Vitality in Communities: Interpretations and Indicators” report
- Online surveys of Freeman Arts Pavilion attendees administered as follows:
 - The IPA team used four post-event surveys to capture impacts associated with a reasonably representative sample of free and paid events. For each event, IPA administered anonymous online surveys via Qualtrics XM.
 - > Elvis Costello & The Imposters (Surveys Sent: 1,051; Responses: 490; Response Rate: 47%)
 - > Face to Face: A Tribute to Elton John & Billy Joel (Surveys Sent: 998; Responses: 383; Response Rate: 38%)
 - > First State Ballet Theatre (Surveys Sent: 327; Responses: 97; Response Rate: 26%)
 - > John Fogerty (Surveys Sent: 1,226; Responses: 578; Response Rate: 47%)
 - In total, IPA received 1,548 responses out of the 3,647 surveys distributed, for a response rate of 42%. IPA evaluated the survey responses for completeness and accuracy and conducted statistical analysis on 1,462 responses.
 - The survey included four question types:
 - > Questions about respondent background
 - » Zip code of primary residence, age, size of party, and ages of party members

- > Detailed information related to participation in events at Freeman Arts Pavilion
 - » How much money was spent on tickets; how much money was spent on food at Freeman Arts Pavilion; if the person stayed overnight as part of their trip; and if the show was the main reason for their visit
- > Estimates of trip expenditures
 - » How much was spent in total on lodging, food, entertainment, transportation, etc. in Sussex County and outside the area
- > Questions about the perceived value of the Freeman Arts Pavilion and how likely the person would be to attend Freeman Arts Pavilion performances again

Report Organization

In addition to the executive summary and this introductory chapter, this report includes two core analysis chapters and two appendices that provide supplementary information related to these analyses. The next chapter, Economic Contributions of Freeman Arts Pavilion, reports the results of IPA’s analysis of the total economic contributions and net economic impacts attributable to Freeman Arts Pavilion, while reviewing the key assumptions and methods used to generate these estimates. The Freeman Arts Pavilion’s Impacts on Cultural Vitality chapter reviews trends in cultural offerings and participation in Sussex County, with a focus on detailing Freeman Arts Pavilion contributions to these trends.

Appendix A includes a copy of the survey questions used, along with the frequency of particular responses for selected questions. Appendix B lists reference data and provides maps in support of the cultural vitality trends analysis.



Economic Contributions of the Freeman Arts Pavilion

This chapter contains a review of the methods, key data sources and trends, and findings associated with IPA's analysis of the Freeman Arts Pavilion's gross economic contributions and net economic impacts to the Sussex County economy.

Key findings include:

- The Freeman Arts Pavilion supported a gross total of \$101.5 million in sales activity in Sussex County over the 2008–2022 period, with nearly \$48.5 million of this total representing new activity that was unlikely to occur in Sussex County without the presence of the Freeman Arts Pavilion.
- Every dollar of direct spending by the Freeman Arts Pavilion over the 2008–2022 period translated to \$1.82 in total contributions to output in the Sussex County economy.
- In 2022, Freeman Arts Pavilion directly and indirectly contributed an estimated \$3.9 million in labor income for Sussex County residents.

Methodology

To generate estimates of the Freeman Arts Pavilion's gross economic contributions and net economic impacts to Sussex County, IPA used IMPLAN economic impact modeling software; detailed data from Freeman Arts Pavilion on revenues and expenditures and out-of-state ticket sales and vendor purchases; and responses to an attendee survey on topics including primary purpose of their visits to Sussex County and spending behavior while visiting Freeman Arts Pavilion and Sussex County. IPA largely duplicated the methods used in the *2019 Comprehensive Impact Analysis of The Freeman Stage*, though changes in data availability and IMPLAN feature updates allowed for several enhancements.⁸ For example, IPA used an analysis-by-parts technique to estimate contributions and impacts for the 2019 study. For this study, IPA used IMPLAN's new detailed industry impact analysis technique, which allowed for substantial customization of Freeman Arts Pavilion's spending patterns without the need for the more cumbersome analysis-by-parts approach. Relative to accepting IMPLAN assumptions, this technique should allow for results that are more consistent with the Freeman Arts Pavilion's operational reality.

IMPLAN model year 2021, the latest available to IPA at the time of the analysis, was used to generate all estimates of contributions and impacts. All dollar amounts are represented in inflation-adjusted 2022 dollars. Table 2 lists and defines key terms related to conducting and interpreting these analyses of gross economic contributions and net economic impacts.

Key analysis steps and related assumptions for this study included:

1. **Translating Freeman Arts Pavilion's line-item budget expenditures data to IMPLAN sectors** to create a customized industry spending pattern for use in modeling the indirect impacts resulting from performances. Due to minor inconsistencies in the categorization of expenditures and lack of prior year spending data on out-of-county versus in-county vendors, the 2022 spending pattern was used to model years from 2019 to 2022. For 2008 to 2018, IPA preserved data from the 2019 analysis, which was modeled based on the 2018 spending pattern.
2. **Collecting direct effects information from Freeman Arts Pavilion budgets equal to the total of sales and contribution income minus any costs associated with sales (e.g., costs of food sold at concession stand)** and inputting this information into IMPLAN as an output for a detailed industry impact analysis event type that also included known employment and labor income totals at the Freeman Arts Pavilion. These totals were preserved for manual combination with direct effects resulting from food truck sales and visitor spending.
3. **Estimating total food truck sales at performances for 2015 to 2021 based on contribution amounts provided from vendors to the Freeman Arts Pavilion.** Total food truck sales for 2022 were provided by Freeman Arts Pavilion staff.
4. **Using survey responses and economic impact analysis literature to determine the share of spending by out-of-county and in-county visitors that should be recognized as contributions of the Freeman Arts Pavilion to Sussex County's economy.** Based on survey responses indicating whether the Freeman Arts Pavilion was the main reason for respondents' visits to Sussex County, both in- and out-of-county visitors to Freeman Arts Pavilion were assigned to "Main Reason" and "Not Main Reason" groups. For the four groupings of in- and out-of-county visitors and "Main Reason" and "Not Main Reason" visitors, Table 3 illustrates the approach used to estimate average spending amounts per visitor that should be reasonably attributed to Freeman Arts Pavilion. Dollar values in the table's second column represent the average per visit spending levels by expenditure type reported by out-

of-county and in-county visitors, respectively, who indicated the Freeman Arts Pavilion was the main reason for their visit. In-county and out-of-county visitors were estimated using 2022 surveys responses. For out-of-county visitors who indicated the Freeman Arts Pavilion was not the main reason for their visit, the average spending per visit amounts were reduced to 25 percent of the “main reason” amounts to account for the proportion of time a visitor staying the median length of two days would likely spend preparing for and attending a performance at Freeman Arts Pavilion. For in-county visitors who

indicated Freeman Arts Pavilion was not the main reason for their visit, average spending amounts were first reduced to the same 25 percent of main reason amounts and then reduced by an additional 90 percent to reflect that 90 percent of in-county visitors in the “not main reason” group indicated that they lived in the area—suggesting a relatively low level of new local spending that should be attributed to Freeman Arts Pavilion. Weighted spending coefficients by attendee and expenditure types were then calculated for both out-of-county and in-county visitors.

Table 2. Key Terms for Interpreting Impact Analyses

Term	Definition
Input-Output Model	“Framework [characterizing]...financial linkages in a regional economy between industries, households, and institutions.” ¹
Economic Contribution	“Gross change in economic activity associated with an industry, event, or policy in an existing regional economy.” ¹
Economic Impact	“Net changes in new economic activity associated with an industry, event, or policy in an existing regional economy.” ¹
Direct Effects	“Set of expenditures applied to the predictive model...for impact analysis. It is a series (or single) of production changes or expenditures made by producers/consumers as a result of an activity or policy.” ²
Indirect Effects	“Impact of local industries buying goods and services from other local industries.” ²
Induced Effects	“Response by an economy to...direct effect...that occurs through re-spending of income received...money is recirculated through...household spending patterns causing further...economic activity.” ²
Employment	“A job in IMPLAN = the annual average of monthly jobs in that industry...Thus, 1 job lasting 12 months = 2 jobs lasting 6 months each = 3 jobs lasting 4 months each. A job can be either full-time or part-time.” ²
Labor Income	“All forms of employment income, including Employee Compensation (wages and benefits) and Proprietor Income.” ²
Output	“The value of industry production...For manufacturers this would be sales plus/minus change in inventory. For service sectors production = sales. For Retail and wholesale trade, output = gross margin and not gross sales.” ²
Multiplier	“Measure of how dollars interjected into a community are respent, thereby leading to additional economic activity...[for instance] for one dollar of economic activity, the output multiplier measures the combined effect of a \$1 change in its sales on the output of all local industries.” ³

Sources:

1. Watson, Philip, Joshua Wilson, Dawn D. Thilmany, and Susan Winter. “Determining Economic Contributions and Impacts: What is the difference and why do we care?” *Journal of Regional Analysis and Policy* 37, no. 1100-2016-90041 (2007).
2. “Glossary.” IMPLAN Support Site, IMPLAN Group, LLC, 2023, <https://support.implan.com/hc/en-us/categories/1500000107962-Glossary>.
3. Hughes, David. “A Primer in Economic Multipliers and Impact Analysis Using Input-Output Models.” <https://extension.tennessee.edu/publications/Documents/W644.pdf>, (2018).

For out-of-county visitors, the weighted spending coefficient by expenditure type represents the sum of average spending per visit values for those indicating Freeman Arts Pavilion was and was not the “main reason” for this visit, with each value weighted by the share of survey respondents reporting, respectively, that Freeman Arts Pavilion was either the main reason for the visit or not. For in-county visitors, spending values for “main reason” and “not main reason” respondents were also weighted according to the proportion of these responses. Additionally, “main reason” in-county visitor spending was further

reduced by 50 percent to reflect that at least a portion of this entertainment-related spending by Sussex County residents substitutes for spending that would have otherwise occurred outside Sussex County or Delaware (i.e., Freeman Arts Pavilion performances allow for local substitution of otherwise imported entertainment services from outside the state and region).⁹

5. Using calculated weighted coefficients of in-county and out-of-county visitor spending and known and estimated in- and out-of-county ticket buyer

Table 3. Estimates of Average Spending by Visitors to the Freeman Arts Pavilion, By Attendee and Expenditure Type

Attendee and Expenditure Type	Average spending (\$) per visit reported by respondents indicating the Freeman Arts Pavilion was “main reason” for visit	Average spending (\$) per visit estimated for respondents indicating the Freeman Arts Pavilion was “not main reason” for visit	Weighted spending (\$) per visit estimated by attendee and expenditure type
Out-of-Sussex	45% of responses	55% of responses	
Hotel	19.50	$19.5 * .25 = 4.88$	$((19.50 * .45) + (4.88 * .55))/3.34 = 3.44$
Grocery	19.95	... = 4.99	... = 3.52
Restaurants	50.43	... = 12.61	... = 8.90
Outdoor recreation	2.77	... = 0.69	... = 0.49
Entertainment	3.29	... = 0.82	... = 0.58
Transportation	13.45	... = 3.36	... = 2.37
Sussex	20% of responses	80% of responses	
Hotel	10.68	$10.68 * .1 * .25 = 0.27$	$((10.68 * .20 * .5) + (0.27 * .80))/3.34 = 0.38$
Grocery	15.17	... = 0.38	... = 0.55
Restaurants	53.60	... = 1.34	... = 1.93
Outdoor recreation	3.85	... = 0.10	... = 0.14
Entertainment	5.98	... = 0.15	... = 0.22
Transportation	13.35	... = 0.33	... = 0.48

Sources: Freeman Arts Pavilion Attendee Survey, 2022; Tyrrell, Timothy J., and Robert J. Johnston. “A framework for assessing direct economic impacts of tourist events: Distinguishing origins, destinations, and causes of expenditures.” *Journal of travel Research* 40, no. 1 (2001): 94–100.; Cobb, Steven, and David Weinberg. “The importance of import substitution in regional economic impact analysis: Empirical estimates from two Cincinnati area events.” *Economic Development Quarterly* 7, no. 3 (1993): 282–286.

Note: Percentage of responses figures do not total to 100 percent because respondents skipped questions. To estimate conservatively, potential contributions from the share of respondents who skipped questions were omitted from consideration.

data to estimate spending by expenditure type and year that should be attributed to Freeman Arts Pavilion. Survey data on the proportion of out-of-county and in-county visitors during 2022 were used to assign attendance numbers to out-of-county and in-county residents over the 2008–2022 period.

Several steps were used to translate in- and out-of-county attendance estimates to spending by expenditure type. First, since the spending data from the survey reflected spending by party, it was divided by the mean party size to represent individual spending. Second, for years prior to 2022, dollar values were deflated using the Bureau of Labor Statistics' inflation calculator.¹⁰ Third, the inflation factor was multiplied by attendance and the weighted spending coefficient for in- and out-of-county visitors, respectively, to arrive at spending totals by expenditure type for each type of visitor. These totals were summed across in- and out-of-county visitors to arrive at total estimated spending attributable to the Freeman Arts Pavilion in the categories of hotels, groceries, restaurants, outdoor recreation, entertainment, and transportation. While these spending categories do not likely capture all spending associated with visitor attendance, they are typical expenditure items included in tourism spending studies similar to the visitor-focused aspect of this study.

6. **Using IMPLAN to model gross contributions of spending by Freeman Arts Pavilion visitors to the Sussex County economy.** Inputs to the model were net visitor spending attributable to the Freeman Arts Pavilion (as estimated in step 5) and food truck spending (as estimated in step 3), which were both entered as commodity output events. Additional direct effects estimated in step 2 were then added to the model results to arrive at the final gross contributions figures by year.
7. **Using IMPLAN to model the net economic impacts of Freeman Arts Pavilion on the Sussex County economy.** As in step 6, the net visitor spending attributable to Freeman Arts Pavilion was inputted to the model. All other inputs used in step 6 were reduced before being entered into the model to reflect only those expenditures that should be reasonably attributed to Freeman Arts Pavilion. Based on input from Freeman Arts Pavilion staff,

the portion of spending supported by contribution income was reduced to 60 percent of the total to reflect the approximate portion of contributions from out-of-county sources. The portion of Freeman Arts Pavilion expenditures supported by sales was reduced based on the estimated split between in- and out-of-county attendees. The estimated in-state portion of sales was reduced by a factor equal to the weighted coefficient from step 4 divided by estimated sales to in-county customers. The out-of-county portion of sales attributed to visitors who indicated the Freeman Arts Pavilion was not the main reason for their visit was reduced to 25 percent of its full estimated value, while sales were not reduced for out-of-county visitors indicating the performance was their main reason for visiting.

Net impact coefficients were then calculated for each year by dividing the sum of reduced sales and contributions by the sum of actual sales and contributions. These coefficients appear in Figure 2, with a maximum value of 0.53 in 2008 and 2009 and low values of 0.34 and 0.33 in 2018 and 2022, respectively. As contributions have made up a smaller portion of Freeman Arts Pavilion's revenues over time, the net impact coefficient has decreased to account for the greater susceptibility, relative to contributions, for sales at the Freeman Arts Pavilion to represent spending shifted from other potential expenditures in Sussex County. Finally, the net impact coefficients were applied to the IMPLAN model inputs from step 6, and these adjusted values were re-entered into the IMPLAN model to estimate the net impacts of the Freeman Arts Pavilion on Sussex County's economy, by year.

Drivers of Economic Contributions and Impacts

Key drivers of increases in estimated gross economic contributions and net economic impacts attributable to Freeman Arts Pavilion include ticket sales and attendance, spending by visitors, contributions to Freeman Arts Pavilion, and expenditures necessary to host Freeman Arts Pavilion. As shown in Figure 3, attendance at performances has increased from just under 9,500 in 2008 to just over 92,000 during the 2022 season—a more than 900 percent increase. Ticket buyer

information over the 2014–2022 period indicated that slightly more than half of ticket buyers come from out of state, a strong indicator that Freeman Arts Pavilion performances introduce new spending to the Sussex County economy.

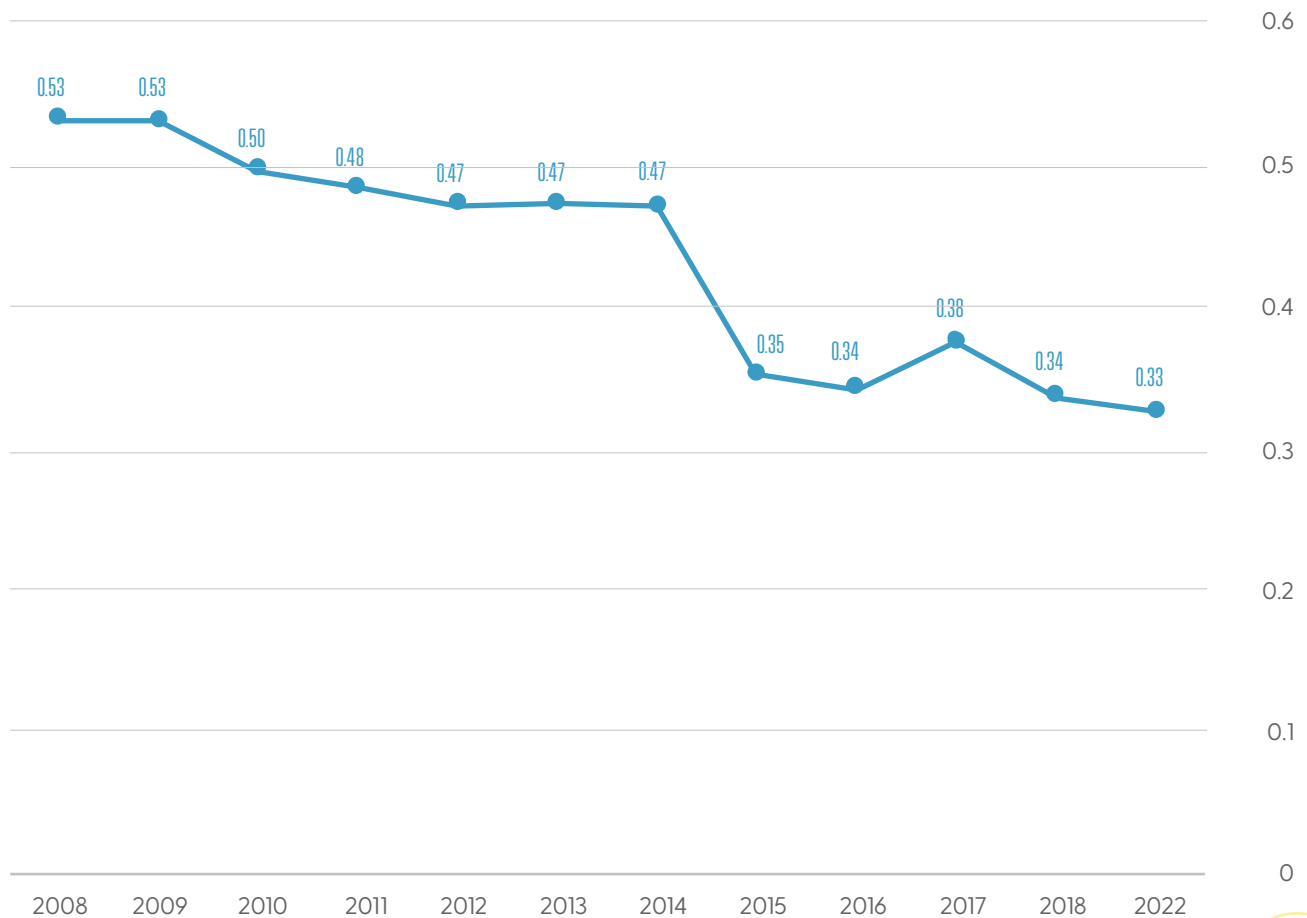
Growing attendance at Freeman Arts Pavilion performances has contributed to significant spending in Sussex County. Though actual visitor spending values are unavailable, the Freeman Arts Pavilion 2022 Attendee Survey was used to estimate spending for groups classified based on their county of residence and whether a performance at Freeman Arts Pavilion was their main reason for visiting Sussex County. Table 4 lists average survey responses for Delaware Sussex residents, Delaware non-Sussex residents, and non-Delaware residents. Non-

local Delawareans and out-of-state residents are more likely to indicate that Freeman Arts Pavilion was their main reason for visiting Sussex County. For the purposes of this study, this finding translates to a greater share of spending by non-local residents—as compared to local residents—being attributed to Freeman Arts Pavilion.

Table 5 indicates average spending totals for all respondent visitors to Freeman Arts Pavilion. Unsurprisingly, visitors who stay overnight tend to spend significantly more money as part of their visit to Sussex County.

Based on steps 4 and 5 as described in the methodology section, and results from the Freeman Arts Pavilion Attendee Survey, Figures 4 and 6 show estimated non-

Figure 2. Calculated Net Impact Coefficient for Freeman Arts Pavilion Activities, 2008–2022



Sources: Freeman Arts Pavilion Attendee Survey, 2019; Tyrrell, Timothy J., and Robert J. Johnston. "A framework for assessing direct economic impacts of tourist events: Distinguishing origins, destinations, and causes of expenditures." *Journal of Travel Research* 40, no. 1 (2001): 94–100; Cobb, Steven, and David Weinberg. "The importance of import substitution in regional economic impact analysis: Empirical estimates from two Cincinnati area events." *Economic Development Quarterly* 7, no. 3 (1993): 282–286.

Delaware resident tourist/visitor spending that can be attributed to attendance at Freeman Arts Pavilion performances. Even after accounting for visitor spending that might simply substitute for other spending in Sussex County, new, out-of-county resident spending in Sussex County has increased from just over an estimated \$74,000 in 2008 to an estimated \$951,000 during the 2022 season. According to survey responses, almost half of this spending has been directed to restaurants in Sussex County.

Compared to spending by non-Sussex County residents, spending by Sussex County residents is more likely to simply substitute for other spending that might have happened in Sussex County regardless of the Freeman Arts Pavilion. Still, estimated new, tourism-related spending associated with Sussex County resident attendance at Freeman Arts Pavilion has grown from \$12,000 in 2008 to just over \$158,000 during the 2022 season (see Figures 5 and 6).

Increased Freeman Arts Pavilion income—grouped as “sales and fundraising” and “contributions and grants”—has accompanied these increases in attendance at performances. Sales totals include patron purchases of Freeman Arts Pavilion concessions and performance tickets. Fundraising income accounts for funds

from auction sales, ticketed fundraising events, and sponsorship income. Contribution income includes charitable donations by individuals, workplace giving, and in-kind goods and services. Grant income includes funds from government and corporate foundation programs. From 2008–2022, total Freeman Arts Pavilion income has steadily increased from just over \$1 million to more than \$9 million (see Figure 7). Though contribution and grants income was greater than sales and fundraising income as recently as 2014, sales and fundraising income has accounted for totals that are two-to-six times greater than other income sources for each year since 2015.

As a nonprofit entity, Freeman Arts Pavilion reinvests nearly all of its income to support its mission. As such, the Freeman Arts Pavilion’s total expenditures have increased from nearly \$800,000 in 2008 to more than \$7.8 million in 2022—an approximately 900 percent increase commensurate with increased attendance over this time period. As a sizable portion of this spending occurs locally and an estimated one-third or more of this spending results in net new activity in Sussex County, increased expenditures by the Freeman Arts Pavilion are another key driver of local economic contributions and impacts (see Figure 8 and Table 6).

Table 4. Overview of Responses to Visitor Spending Portions of Attendee Survey

	Delaware Sussex Residents	Delaware Non-Sussex Residents	Non-Delaware Residents
Percent Responses (frequency) ¹	54% (787)	6% (87)	40% (585)
Percent Staying Overnight (frequency) ²	2% (16)	18% (16)	17% (98)
Percent Main Reason Visiting Sussex County (frequency) ³	15% (117)	47% (41)	45% (263)
Average One-Way Distance from Primary Residence to Freeman Arts Pavilion	13 miles	59 miles	65 miles
Average Size of Party	3.4	3.1	3.3
Median Spending on Food at Freeman Arts Pavilion	\$30–\$40	\$30–\$40	\$30–\$40
Median Spending on Tickets	\$100–\$200	\$100–\$200	\$100–\$200

Source: Freeman Arts Pavilion Attendee Survey, 2022.

1. The total number of responses to this question (n=1,459) does not match the total number of survey responses (n=1,462) because of incomplete survey responses.

2. If respondent indicated that the show at Freeman Arts Pavilion was not their main reason for visiting the Sussex County area, this question was not asked.

3. If respondent zip code was 19975, which includes Freeman Arts Pavilion, then this question was not asked.

Overview of Findings

Estimated Gross Economic Contributions, 2008–2022

Figure 9 and Table 6 detail the Freeman Arts Pavilion’s estimated gross contributions to economic output in Sussex County over the 2008–2022 period. Figure 9 emphasizes the gross contributions to the local economy supported by Freeman Arts Pavilion expenditures for performances. Table 6 lists the effects of Freeman Arts Pavilion spending and spending by visitors on sales activity in Sussex County. The Freeman Arts Pavilion’s contributions to sales activity in Sussex County have grown from an estimated \$2.1 million in 2008 to nearly \$18 million in 2022. Over the 2008–2022 period, the Freeman Arts Pavilion’s \$55.8 million in direct spending spurred total sales activity in Sussex County of \$101.5 million, which consists of Freeman Arts Pavilion’s expenditures, net spending by visitors, and the indirect and induced effects resulting from these activities. Again over 2008–2022, each dollar of spending by the Freeman Arts Pavilion resulted in \$0.82 of additional sales activity across Sussex County—the equivalent of a final output

multiplier of 1.82. In 2022, the Freeman Arts Pavilion’s final output multiplier was estimated at 2.12, with each dollar of direct spending translating to \$1.12 of additional sales activity across Sussex County.

Table 7 summarizes the Freeman Arts Pavilion’s contributions to labor income in Sussex County, including direct spending for employees of the Freeman Arts Pavilion, labor income supported by net visitor spending attributed to the Freeman Arts Pavilion, and the gross labor income contributions that result as this income is spent and re-spent throughout the economy. From 2008 to 2022, direct labor spending by the Freeman Arts Pavilion increased by more than \$1.2 million and labor income supported by net visitor spending increased from \$132,633 to \$358,763. Total labor income effects increased from just under \$1 million in 2008 to nearly \$4 million in 2022. This income accounted for an estimated 95 jobs in 2022 across sectors that include independent artists, writers, and performers (20); full-service restaurants (18); promoters of performing arts (7); employment services (4); retail food and beverage stores (2); and all other food and drinking places (2).

Table 5. Average Reported Spending by Visitors to Freeman Arts Pavilion

Respondent’s Primary Residence	Stayed Overnight (includes accommodations)		Did Not Stay Overnight (without accommodations)	
	Spending in Sussex County	Spending Outside Sussex County	Spending in Sussex County	Spending Outside Sussex County
Delaware (Sussex)	\$313.04	\$94.11	\$54.38	\$11.57
Delaware (Non-Sussex)	\$157.14	\$107.14	\$29.92	\$0.00
Non-Delaware	\$165.69	\$102.54	\$31.30	\$2.33

Source: Freeman Arts Pavilion Attendee Survey, 2022.

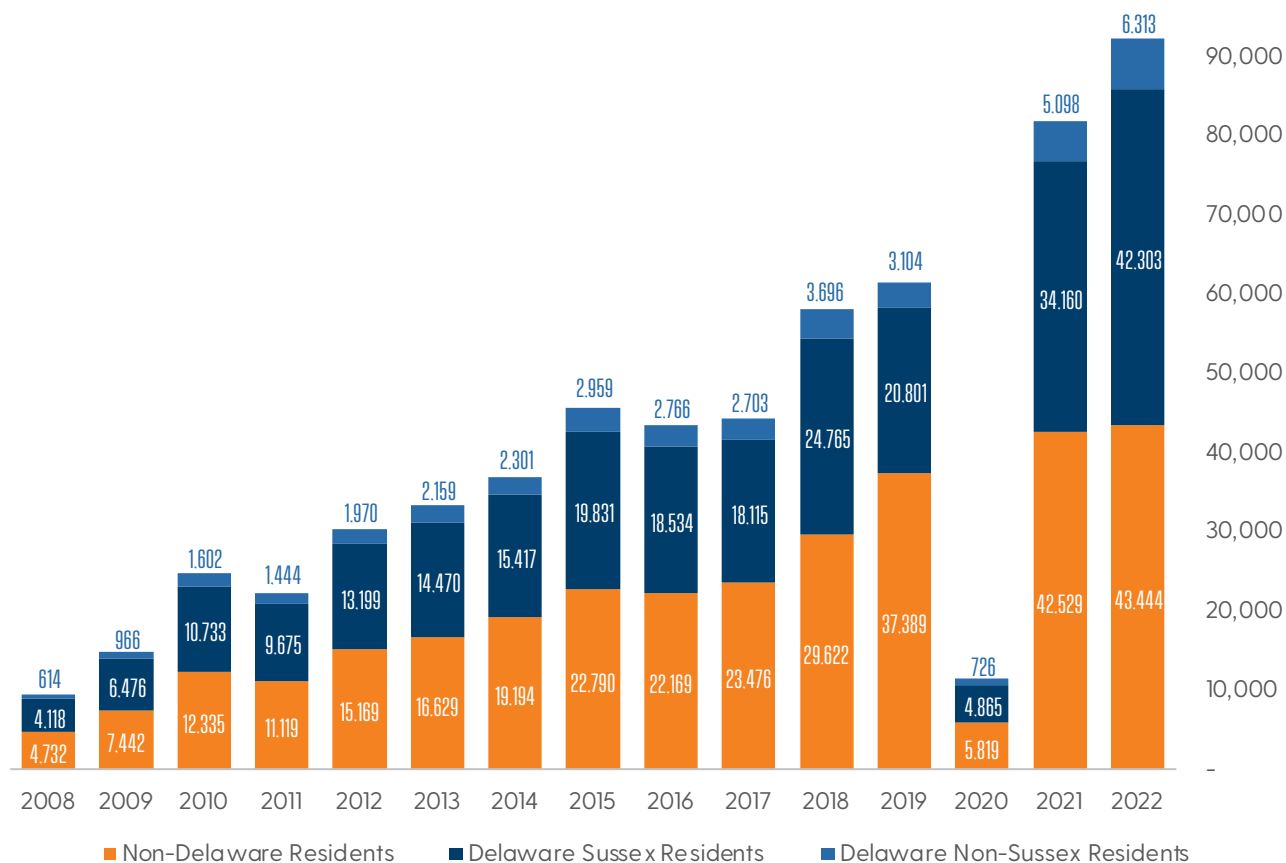
Estimated Net Economic Impacts, 2008–2018 and 2022

As discussed in the methodology section, making a conservative estimate of the economic impacts that may be attributed to the Freeman Arts Pavilion requires accounting for the proportion of spending that might have occurred in Sussex County even without Freeman Arts Pavilion programming. For example, local residents or visitors to Sussex County may have shifted spending on other local entertainment outlets to spending at the Freeman Arts Pavilion. While such spending is counted as part of the Freeman Arts Pavilion's gross contributions, it should not be counted as a net economic impact representing economic activity that is

truly new to Sussex County. On the other hand, Freeman Arts Pavilion performances may result in local residents choosing to spend entertainment dollars locally rather than spending in Baltimore, Philadelphia, or elsewhere. Further, residents from outside Sussex County may take new trips to Sussex County based on the attractiveness of Freeman Arts Pavilion performances. These two factors—keeping local dollars local when residents might otherwise spend them outside the county and attracting new, non-resident spending to the county—account for the net economic impacts generated by the Freeman Arts Pavilion.

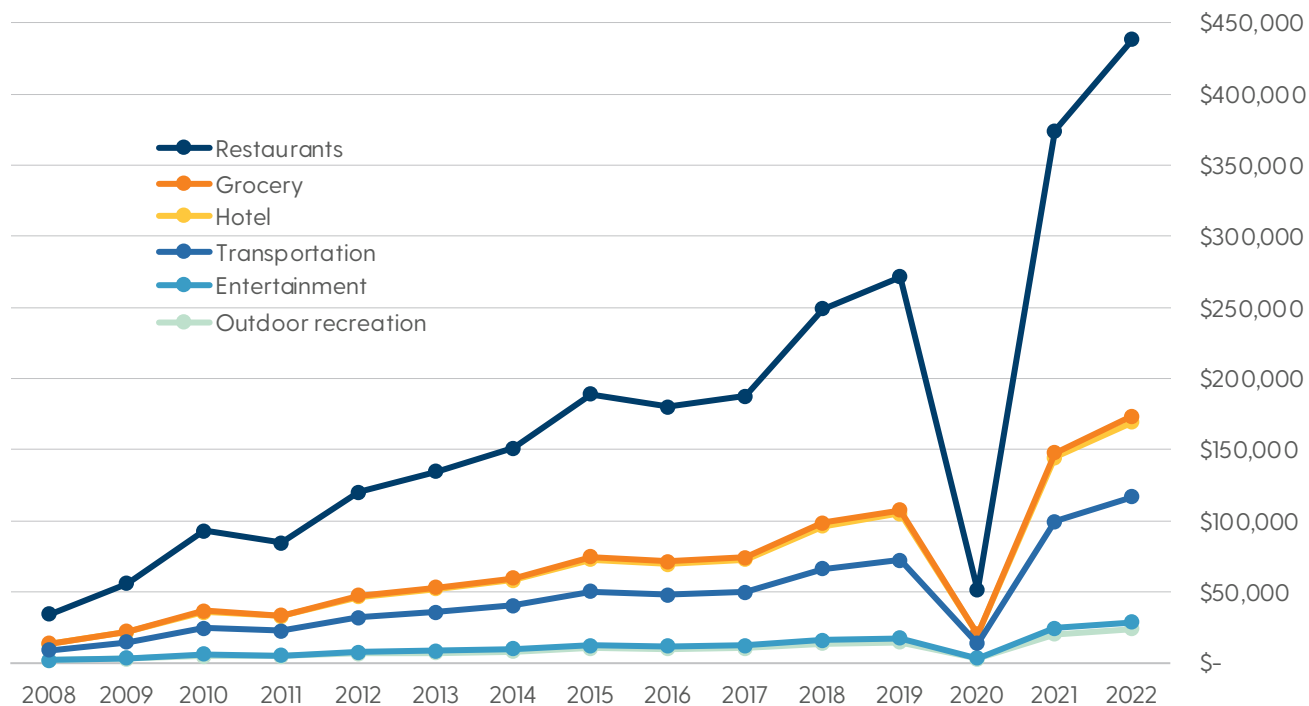
Table 8 lists the direct, indirect, induced, and total net impacts of the Freeman Arts Pavilion on output in Sussex County over the 2008–2022 period. The annual

Figure 3. Estimated Delaware (Sussex and Non-Sussex) and Non-Delaware Resident Attendance to Freeman Arts Pavilion Performances, 2008–2022



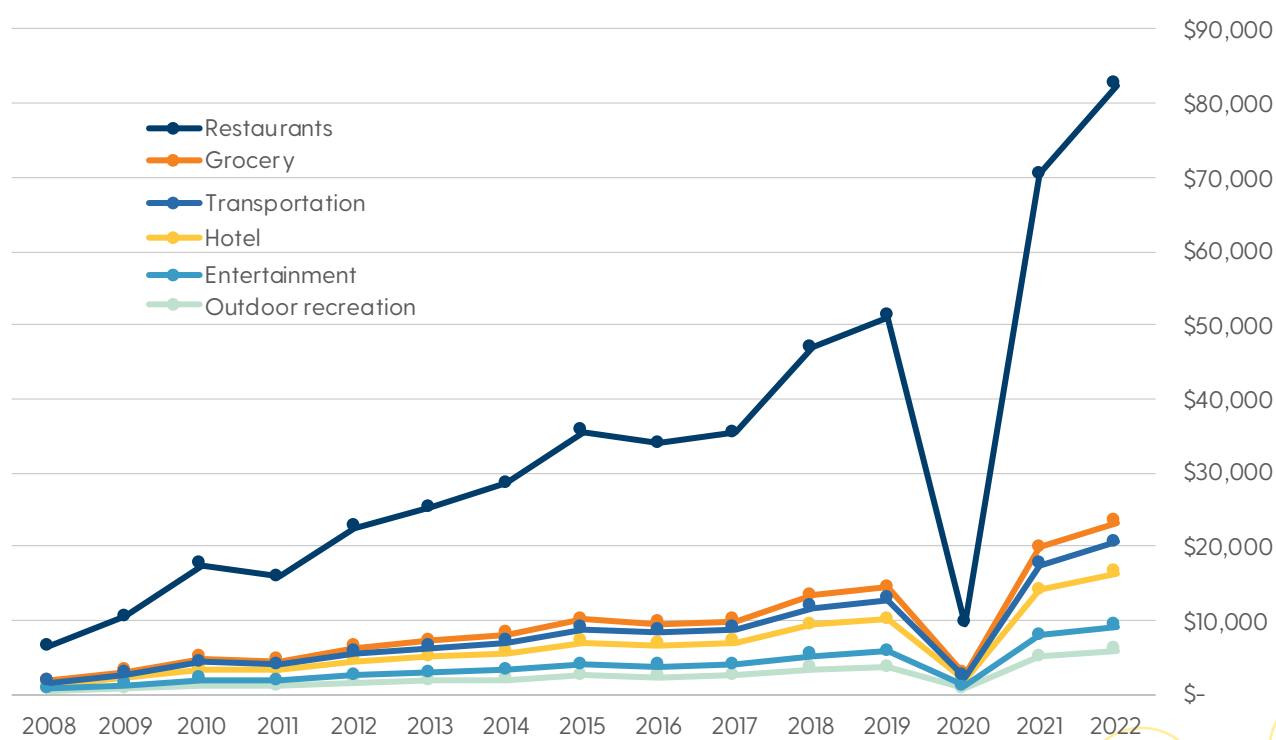
Source: Total attendance figures provided by Freeman Arts Pavilion, with Delaware and non-Delaware resident proportions of attendance estimated based on the reported share of Delaware and non-Delaware resident ticket buyers for 2014–2022. For 2008–2013, a 50-50 split of Delaware and non-Delaware resident attendance was assumed. IPA used 2022 survey responses to estimate the proportion of Sussex and Non-Sussex residents. This 2022 proportion was used to estimate Sussex and Non-Sussex residents for all years.

Figure 4. Estimated Non-Sussex Resident Visitor Spending (\$) Attributable to Freeman Arts Pavilion Performances



Sources: Freeman Arts Pavilion Attendee Survey, 2022; Attendance and ticket buyer information provided by the Freeman Arts Pavilion, 2022.
Note: All dollar values presented in inflation-adjusted 2022 dollars.

Figure 5. Estimated Sussex Resident Visitor Spending (\$) Attributable to Freeman Arts Pavilion Performances



Sources: Freeman Arts Pavilion Attendee Survey, 2022; Attendance and ticket buyer information provided by the Freeman Arts Pavilion, 2022.
Note: All dollar values presented in inflation-adjusted 2022 dollars.

net impact of the Freeman Arts Pavilion on sales activity in Sussex County has increased from \$1.3 million in 2008 to \$5.5 million in 2022. From 2008–2022, the Freeman Arts Pavilion accounted for almost \$48.5 million of new sales activity in Sussex County—a total representing nearly half of the Freeman Arts Pavilion’s gross contributions to output over this period.

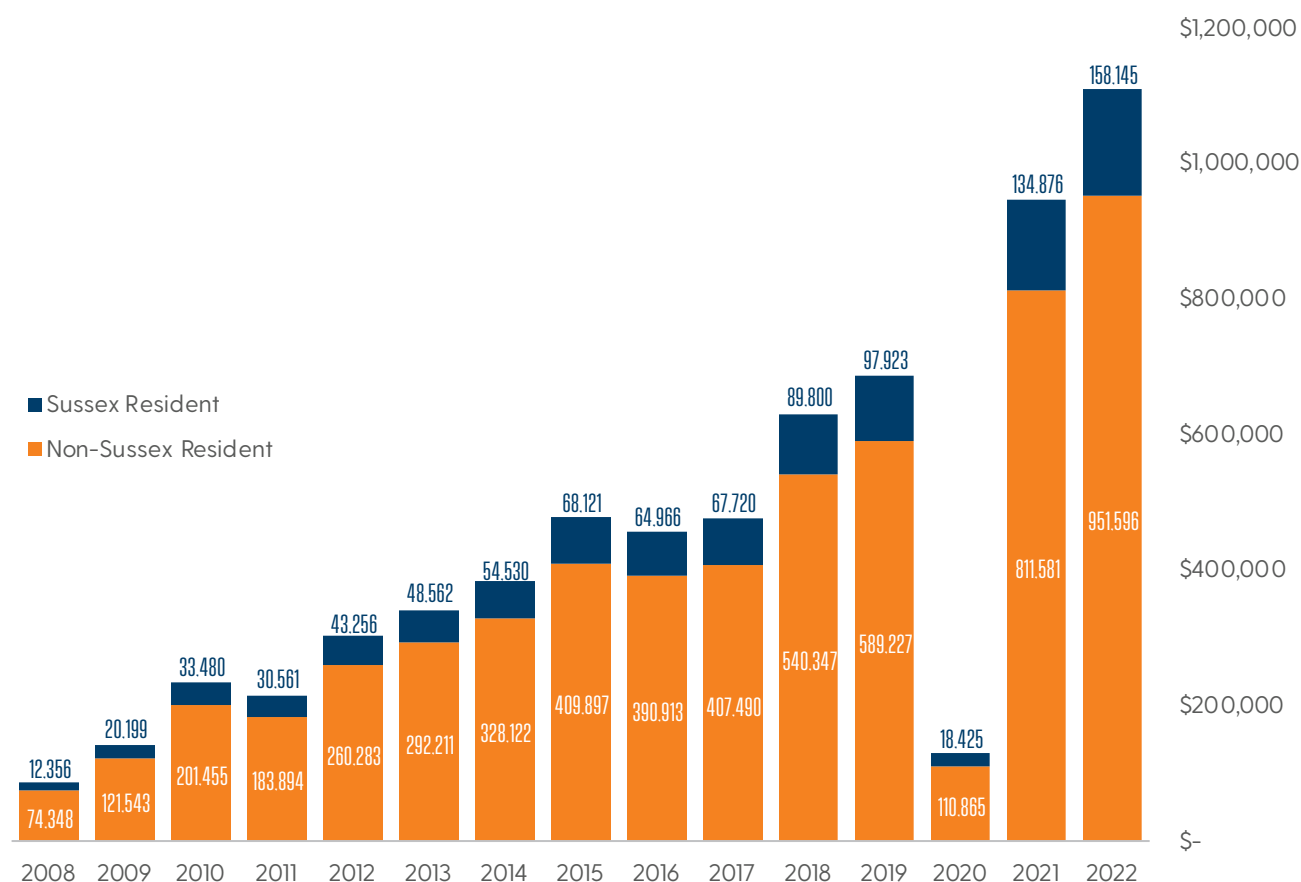
Construction and Maintenance Impacts from the Freeman Arts Pavilion

The Freeman Arts Pavilion requires periodic infrastructure investments to improve or maintain the quality of facilities. Annually, these investments include

landscaping, installation of lighting structures, sidewalks, fences, and other small- and large-scale development efforts. During 2022, the Freeman Arts Pavilion invested in construction and maintenance efforts that involved approximately \$209,000 spent on local vendors.

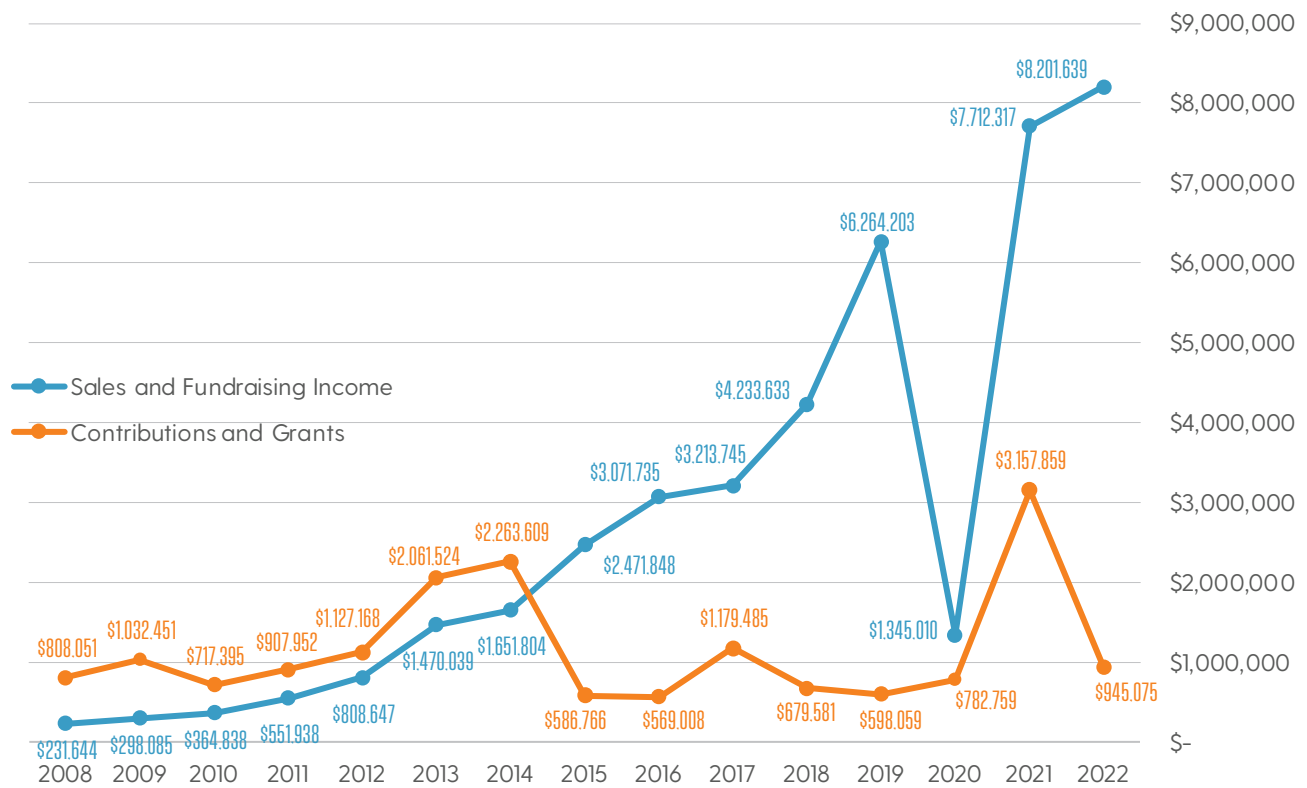
Table 9 shows the net impacts of Freeman Arts Pavilion’s 2022 construction and maintenance spending on local, Sussex County vendors. IPA assumed that these construction and maintenance expenses would not have occurred without the Freeman Arts Pavilion, so they were not adjusted for substitution effects. In total, the Freeman Arts Pavilion’s 2022 spending on local construction and maintenance vendors resulted in an estimated \$317,118 impact on total economic output in Sussex County.

Figure 6. Total Non-Sussex and Sussex County Resident Visitor Spending (\$) Attributable to Freeman Arts Pavilion Performances



Sources: Freeman Arts Pavilion Attendee Survey, 2022; Attendance and ticket buyer information provided by the Freeman Arts Pavilion, 2022.
Note: All dollar values presented in inflation-adjusted 2022 dollars.

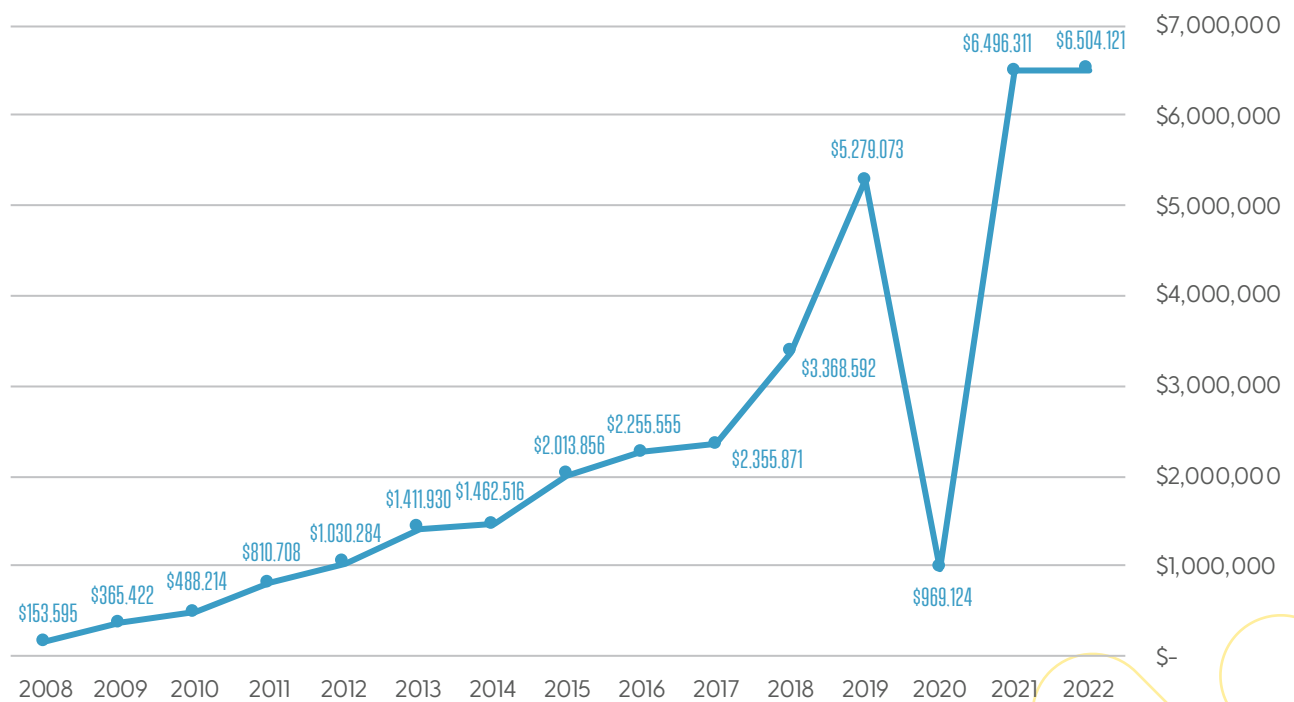
Figure 7. Sales and Fundraising and Contributions and Grants Income (\$) for the Freeman Arts Pavilion



Source: Freeman Arts Pavilion, 2022.

Note: All dollar values presented in inflation-adjusted 2022 dollars.

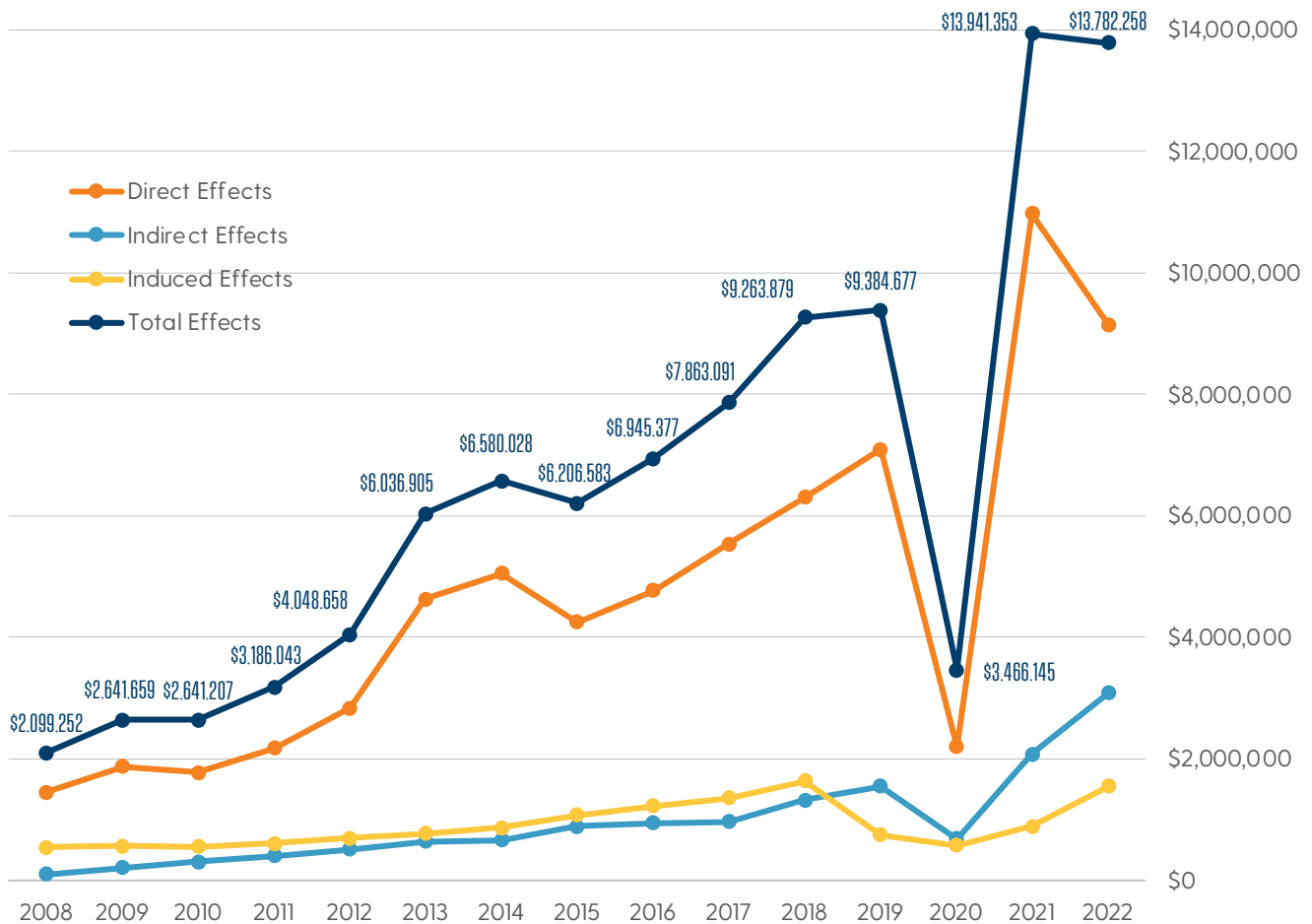
Figure 8. Expenditures (\$) by the Freeman Arts Pavilion (excluding labor), 2008–2022



Source: Freeman Arts Pavilion, 2022. Year 2022 is the only year that includes construction-related spending.

Note: All dollar values presented in inflation-adjusted 2022 dollars.

Figure 9. Freeman Arts Pavilion Contributions to Output in Sussex County, 2008–2022



Sources: IMPLAN 2021 Data and Model; Freeman Arts Pavilion budget and expenditures detail, 2008–2022.
 Note: All dollar values presented in inflation-adjusted 2018 dollars.

In 2022, Arts in Education programming consisted of 30 theatre, music, and dance performances that reached 25,951 students drawn from 13 school districts in Delaware and Maryland.

Table 6. Freeman Arts Pavilion's Spending and Multiplier of Spending on Total Output in Sussex County, 2008–2022

	Direct Spending by the Freeman Arts Pavilion (\$)	Net Visitor Spending (\$)	Total Effects (\$)	Multiplier of the Freeman Arts Pavilion's Spending
2008	1,229,953	200,606	2,071,989	1.68
2009	1,626,827	319,543	2,745,935	1.69
2010	1,253,490	524,790	2,641,207	2.11
2011	1,623,413	470,139	3,070,885	1.89
2012	2,126,509	647,036	3,953,395	1.86
2013	3,765,146	711,282	5,831,101	1.55
2014	3,992,764	780,794	6,218,488	1.56
2015	2,982,878	1,035,935	5,869,269	1.97
2016	3,476,529	986,676	6,497,288	1.87
2017	4,114,931	1,019,591	7,289,741	1.77
2018	4,421,894	1,257,009	8,337,491	1.89
2019	6,739,297	627,852	10,270,395	1.52
2020	2,022,349	167,343	3,623,012	1.79
2021	7,983,500	1,066,347	15,118,342	1.89
2022*	8,455,737	1,377,642	17,940,397	2.12
2008–2022	55,815,217	11,192,585	101,478,936	1.82

Sources: IMPLAN 2021 Data and Model; Freeman Arts Pavilion budget and expenditures detail, 2008–2022; Freeman Arts Pavilion Attendee Survey 2019 and 2022. Net visitor spending values from 2008 to 2018 were adopted from the *Comprehensive Impact Analysis of The Freeman Stage*, 2019 and re-adjusted for inflation to 2022 dollars.

Note: The peak in 2018 net visitor spending values can be explained by two differences in the methodology between the 2019 impact analysis and this analysis. First, visitor spending values before 2019, due to limitations of the data, were calculated for out-of-state and in-state visitors. For 2019–2022, an out-of-county and in-county approach was taken. Second, inconsistencies in party-size data were resolved for post-2018 years. All dollar values presented in inflation-adjusted 2022 dollars.

*Year 2022 is the only year that included construction spending and its effects on the local economy.



Table 7. Freeman Arts Pavilion's Direct Contributions to Labor Income, Labor Income Supported by Net Visitor Spending, and Total Labor Income Contributions in Sussex County, 2008–2022

	Direct Contributions to Labor Income by Freeman Arts Pavilion	Labor Income Directly Supported by Net Visitor Spending	Total Labor Income Effects
2008	656,515	130,910	979,384
2009	600,722	208,963	1,056,903
2010	398,270	345,557	1,011,933
2011	438,785	308,234	1,060,354
2012	438,212	424,253	1,240,091
2013	437,614	466,557	1,343,639
2014	505,689	512,739	1,483,083
2015	558,100	682,628	1,837,977
2016	775,466	651,243	2,084,705
2017	917,695	673,739	2,284,943
2018	927,457	868,489	2,660,765
2019	1,098,502	229,332	1,990,348
2020	1,025,545	46,408	1,455,909
2021	1,227,855	302,982	2,403,400
2022	1,951,616	358,763	3,941,168
2008–2022	11,958,041	6,210,798	26,834,603

Sources: IMPLAN 2021 Data and Model; Freeman Arts Pavilion budget and expenditures detail, 2008–2022; Freeman Arts Pavilion Attendee Survey, 2019, 2022. Labor income values from 2008 to 2018 were adopted from the *Comprehensive Impact Analysis of The Freeman Stage*, 2019 and re-adjusted for inflation to 2022 dollars.

Note: The peak in 2018 of labor income directly supported by net visitor spending values can be explained by two differences in the methodology between the former impact analysis and this current one. First, the labor income values before 2019, due to limitations of the data, were calculated for out-of-state and in-state visitors, while for the years from 2019 to 2022, an out-of-county and in-county approach was taken. Second, some inconsistencies in party-size were resolved for post-2018 years. All dollar values presented in inflation-adjusted 2022 dollars; labor income estimates include benefits.



Table 8. Freeman Arts Pavilion's Net Economic Impacts on Output in Sussex County, 2008–2022

	Direct Effects (\$)	Indirect Effects (\$)	Induced Effects (\$)	Total Effects (\$)
2008	852,481	76,164	331,304	1,259,950
2009	1,181,761	144,718	378,246	1,704,723
2010	1,151,535	207,518	400,062	1,759,115
2011	1,249,376	239,154	394,723	1,883,253
2012	1,646,494	307,951	481,371	2,435,817
2013	2,480,901	373,333	524,698	3,378,932
2014	2,657,392	389,478	578,314	3,625,184
2015	2,024,840	440,113	646,665	3,111,618
2016	2,112,028	443,432	672,283	3,227,743
2017	2,528,840	477,016	748,919	3,754,775
2018	2,760,453	598,649	905,675	4,264,776
2019	2,359,251	1,546,848	372,497	4,278,596
2020	913,177	283,856	240,958	1,437,991
2021	4,303,129	2,083,535	503,887	6,890,551
2022	3,258,823	1,646,512	561,221	5,466,556
2008–2018	31,480,482	9,258,276	7,740,822	48,479,580

Sources: IMPLAN 2021 Data and Model; Freeman Arts Pavilion budget and expenditures detail, 2008–2022; Freeman Arts Pavilion Attendee Survey, 2022.

Note: All dollar values presented in inflation-adjusted 2022 dollars.

Table 9. Net Impacts from Construction of the Freeman Arts Pavilion, 2022

Impact Type	Employment	Labor Income (\$)	Output (\$)
Direct Effect	1.12	\$83,320	\$209,009
Indirect Effect	0.26	\$15,921	\$54,344
Induced Effect	0.33	\$16,530	\$53,765
Total Effect	1.71	\$115,771	\$317,118

Sources: IMPLAN 2021 Data and Model; Freeman Arts Pavilion construction costs provided by Freeman Arts Pavilion, 2022.

Note: All dollar values presented in inflation-adjusted 2022 dollars.



Cultural Vitality Impacts of the Freeman Arts Pavilion

This chapter reviews Sussex County and Delaware trends in arts and culture offerings and participation, with a focus on detailing the Freeman Arts Pavilion's contributions to these trends.

Key findings include:

- Patrons participating in an online survey overwhelmingly agreed with the statements that the Freeman Arts Pavilion “provides arts and cultural entertainment that would be missing otherwise,” “creates opportunities for positive social interactions in the community,” “enhances the sense of community in southern Delaware,” and “increases awareness of and participation in the arts.”
- With recent population growth statewide often outpacing growth in arts and cultural resources, Freeman Arts Pavilion serves a key regional role in enhancing access to the arts in Sussex County and across Delaware.
- Through its Arts in Education program and broader Arts Access Initiative, Freeman Arts Pavilion serves a diverse range of populations drawn from all age groups and economic strata across Delaware. The Freeman Arts Pavilion’s Arts in Education program helps Sussex County schools achieve arts education standards while engaging K–12 students in enriching programming.
- Access to the Freeman Arts Pavilion serves as an attractive quality-of-life amenity for residents countywide.
- Growing levels of volunteer activity and financial support provided by donors and community partners serve as evidence of the significant value ascribed to the Freeman Arts Pavilion by a wide variety of individuals and businesses.

Survey Evidence of the Freeman Arts Pavilion’s Impacts

Freeman Arts Pavilion Attendee Survey

In addition to providing information on visitor spending patterns associated with Freeman Arts Pavilion performances, the Attendee Survey also gathered feedback on any intangible benefits that attendance at performances may offer. Specifically, the survey asked respondents to report their level of agreement with a series of statements related to the Freeman Arts Pavilion’s quality of life and cultural impacts. While

survey respondents were not drawn from a random sample, the overwhelming direction of responses suggests that the Freeman Arts Pavilion is viewed as a considerable quality-of-life and cultural asset for the region.

- Ninety-two percent of survey respondents agreed or strongly agreed that the Freeman Arts Pavilion “provides arts and cultural entertainment that would be missing otherwise.”
- Ninety-two percent agreed or strongly agreed that the Freeman Arts Pavilion is a place where they can go to experience positive interactions with other members of the community.
- Ninety-eight percent of respondents indicated that they would be likely or very likely to attend more performances or programs delivered by the Freeman Arts Pavilion.

Appendix A contains charts with more detailed response information from select questions relevant to the Freeman Arts Pavilion’s cultural and quality-of-life impacts.

Cultural Vitality Assessment

To outline connections among Freeman Arts Pavilion programs and changes in countywide cultural offerings, IPA prepared an analysis of the presence of, participation in, and support for arts and culture offerings in Sussex County to longitudinally assess cultural vitality from 2007 to 2022. Guided by the Urban Institute’s 2006 report, *Cultural Vitality in Communities: Interpretations and Indicators*, this analysis examines various measures of arts and culture indicators for Sussex County to study community dynamics and understand how the Freeman Arts Pavilion may contribute to these conditions.

The Urban Institute’s Arts and Culture Indicators Project defines cultural vitality as “the evidence of creating, disseminating, validating, and supporting arts and culture as a dimension of everyday life in communities.”¹¹ Creating a comprehensive picture of a community’s cultural vitality depends on information in three domains: presence, participation, and support.

This evaluation of cultural vitality in Sussex County drew from two tiers of data. Tier One data are publicly

available, recurrent, and nationally comparable. Tier Two data are publicly available, recurrent, and locally generated.¹²

To examine the differences in cultural vitality in Sussex County over the 2007–2022 period, IPA examined absolute changes in conditions, with absolute change defined as:

$$\text{Absolute Change } (\Delta X) = X_{2022} - X_{2007}$$

Where X is the measure of cultural vitality for that year.

Since many of the measures represent per capita values and imperfect measures of population exist for 2007 and 2022, proxies were used for population values. For 2022 population, 2020 U.S. Census data were used for Sussex County. For 2007 population, 2010 U.S. Census data were used for the same geographical areas.

Presence

The presence of cultural vitality in a community looks at whether physical opportunities for cultural participation exist in specific geographical areas. Measures include number of arts organizations, temporary arts venues such as parades, cultural programming at libraries or religious venues, public spaces specifically suited for cultural activities, and cultural districts and neighborhoods.¹³

The Urban Institute recommends several Tier One measures to examine presence of opportunities for participation:

- Arts establishments per 1,000 population including both nonprofit and commercial entities;
- Percentage of employment in nonprofit and commercial arts establishments as a proportion of all employment; and
- Nonprofit arts organizations per 1,000 population.

Arts Establishments per 1,000 population including both nonprofit and commercial entities, 2007–2022

These data are from the U.S. Census Bureau's ZIP Codes Business Patterns (ZBP), which report data from an annual survey on all establishments, including nonprofit and commercial organizations, with information on arts industries available based on categorization of establishments according to the North American Industry Classification System (NAICS).¹⁴ ZBP data

were only available through 2020 at the time of this analysis, so data for this component of the analysis cover change between 2007 and 2020. At the time of this report's production, only sixteen zip codes had information related to arts establishments.

The calculation for the arts establishments per 1,000 population was:

$$X_t = \frac{\text{Arts Establishments}_t}{\text{Population}_t} \times 1,000$$

where t is the year.

Statewide, 25 percent of the zip codes—four out of the 16 in total—experienced a positive absolute change in the number of arts establishments per 1,000 population over the 2007–2022 period.¹⁵ With population growth tending to outpace growth in the number of arts establishments for most geographies statewide, the Freeman Arts Pavilion likely plays a key role in providing arts and culture experiences that may otherwise be missing in Delaware.

Employment in nonprofit and commercial arts establishments as a percentage of all employment

The Occupational Employment Statistics (OES) dataset provides a detailed, frequently updated picture of the number of individuals employed in arts-related occupations.¹⁶ For the purposes of this analysis, data are only available at the state level and, as with the ZBP data, self-employed workers are excluded. Even with these limitations, OES data can be used to examine changes in the share of total workers employed in arts occupations over time. Figure 10 displays the employment of Delaware workers in arts occupations as a percentage of total employment from 2007 to 2021. Over this period, an average of 0.07 percent of Delaware workers were employed in arts occupations, and it seems that the share of employment in arts occupations is on a downward trend. In addition to providing audiences with access to a variety of arts experiences, the range of arts programming and performances delivered by the Freeman Arts Pavilion supports a portion of arts employment opportunities in Delaware.

Nonprofit arts organizations per 1,000 population

The National Center for Charitable Statistics (NCCS) database at the Urban Institute provides counts of nonprofit arts organizations based on information from

Ninety-eight percent of respondents indicated that they would be likely or very likely to attend more performances or programs delivered by the Freeman Arts Pavilion.

IRS 990 tax forms.¹⁷ More than half of Delaware's zip code areas experienced a positive, per capita increase in nonprofit arts organizations between 2007 and 2018.¹⁸

Participation

Participation examines qualitative and quantitative engagement in culture and arts programming. This may include enrollment in formal or informal arts instruction, purchase of art material, collective arts making at community events, media coverage of cultural practices, and membership in associations related to the arts.¹⁹

Participation was measured through Tier Two data, since there are no nationally recurrent databases that include indicators of cultural participation. The indicators for participation were:

- K–12 arts education in Delaware
- Audience participation

K–12 arts education in Delaware

In 2016, the Delaware Board of Education adopted new standards for arts education in the state. The new measurements were guided by the National Core Arts Standards developed by the National Coalition for Core Arts Standards. Delaware has four categories of standards for arts education, each with goals that students should meet. The standards and goals are:

- Creating
 - Conceptualize and produce artistic work
- Performing/Presenting/Producing
 - Select and analyze artistic work for presentation
 - Develop and refine presentation skills
 - Convey meaning through presentation of artistic work
- Responding
 - Analyze artistic work

- Interpret art in a meaningful way
- Critically evaluate work and revise as needed
- Connecting
 - Translate personal knowledge and experiences to artwork
 - Connect art, culture, and history to deepen understanding²⁰

Through the Arts in Education program, the Freeman Arts Pavilion has provided direct programming to schools in an effort to improve access to the arts and to help schools achieve these standards. The Freeman Arts Pavilion has significantly increased the number of participants reached through its Arts in Education program, with the number increasing from 2,000 in 2010 to 25,951 in 2022, with a record high of 41,259 participants in 2021. Working with school districts, surrounding communities, and local artists, the Freeman Arts Pavilion has organized efforts to paint murals in all of the Sussex County schools, brought students to the Town Hall Education Arts Recreation Campus in Southeast Washington, D.C., conducted writing workshops, and generally provided students with arts exposure opportunities that they would not have gotten otherwise. These efforts became critical during the period of isolation due to Covid-19. During this period, Freeman Arts Pavilion staff implemented innovative solutions such as distributing art kits to area schools as an alternative to performing live.

Freeman Arts Pavilion Attendance

As illustrated in Figure 3, attendance at the Freeman Arts Pavilion has increased substantially over the first 15 years of performances—rising from 9,464 in 2008 to 90,060 in 2022. Participation in the arts is an integral component to social capital and cultural vitality, and the Freeman Arts Pavilion offers Sussex County and Delaware residents numerous opportunities annually to participate in both free and paid performances.

Support

Support examines resources available for arts activity in both the commercial and nonprofit sectors. While financial support is a main component of this domain, there are also other measures of support such as advocacy for the arts, public policies that integrate the arts into other sectors, and volunteering and personal support. There are also indirect measures of support such as education, parks, libraries, and other economic development opportunities.

The Tier Two indicators for support are:

- Delaware Division of the Arts grants
- National Endowment for the Arts grants
- Volunteers and sponsors of the Freeman Arts Pavilion

Delaware Division of the Arts Grants and National Endowment for the Arts Grants

The Delaware Division of the Arts and the National Endowment for the Arts (NEA) have increased their monetary support of the arts in Delaware over the 2007–2022 period. This increased support includes

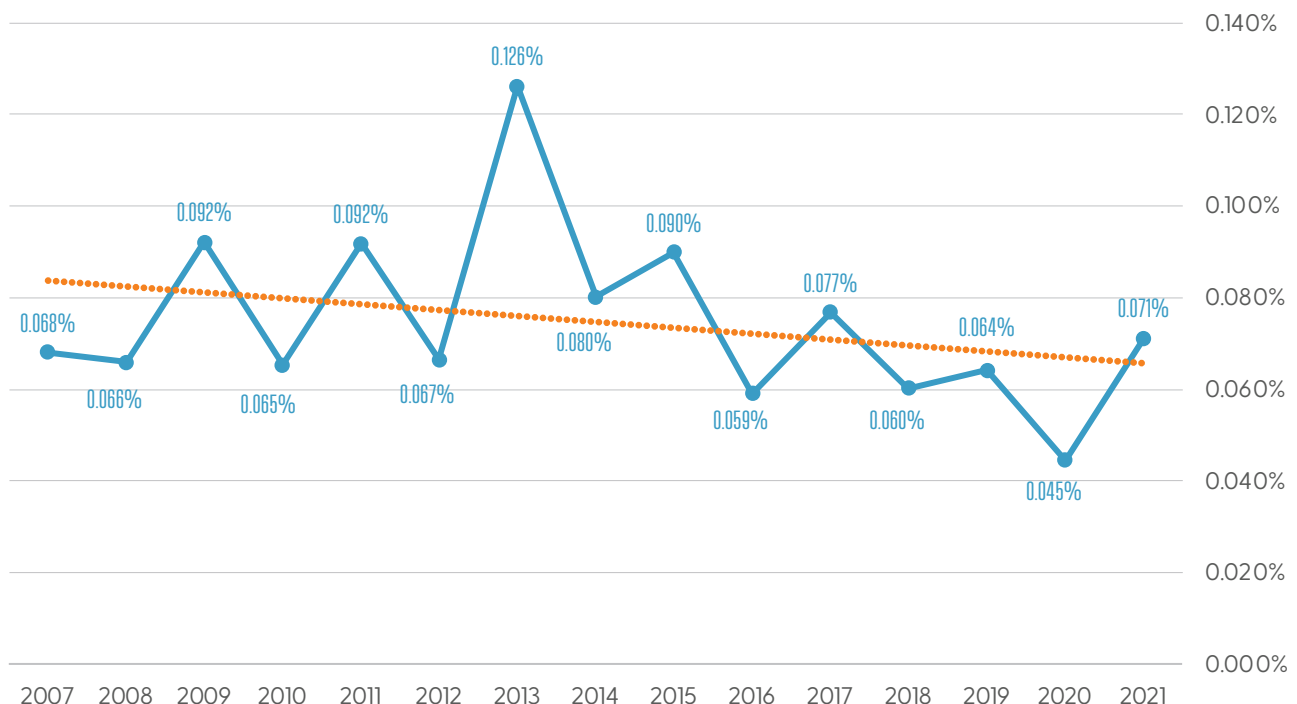
NEA-awarded grants to the Joshua M. Freeman Foundation for its Sussex County Arts in Education Program and general operations of that initiative and performances.

Volunteers and Sponsors

The Freeman Arts Pavilion relies on volunteers to ensure the smooth and effective delivery of its performances and programming. In 2021, 260 volunteers at the Freeman Arts Pavilion donated an estimated 20,117 hours of their time—up from nearly 13,000 hours in 2017—to ensure the quality of the Freeman Arts Pavilion’s programming. These volunteer hours provided a value of more than \$574,000 according to the Independent Sector rate for Delaware.²¹

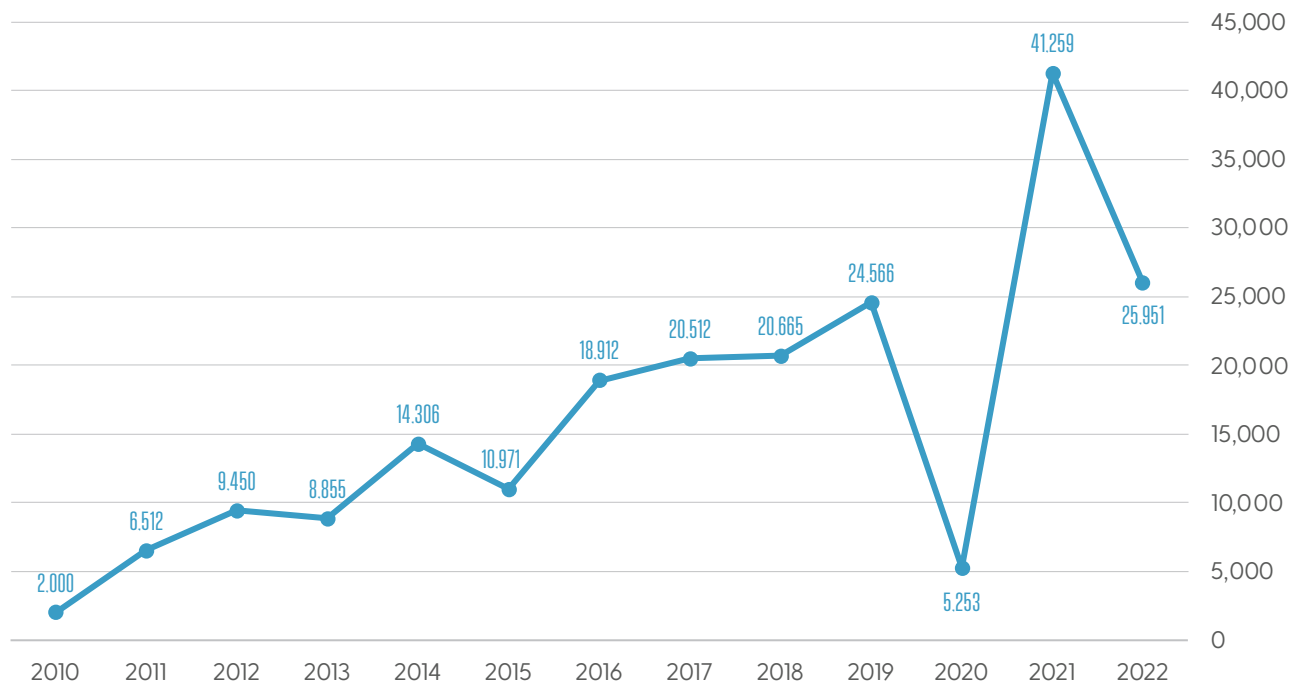
In addition to numerous individual donors, the Freeman Arts Pavilion is supported by many sponsors that differ greatly in type of business, location, size, and sponsorship. Sponsorship can represent financial support or in-kind donations. According to the Joshua M. Freeman Foundation’s 2021 annual report, each of twenty community partners provided financial support exceeding \$10,000 during 2021.²²

Figure 10. Employment in Arts Occupations as a Percent of Total Delaware Employment, 2007–2021



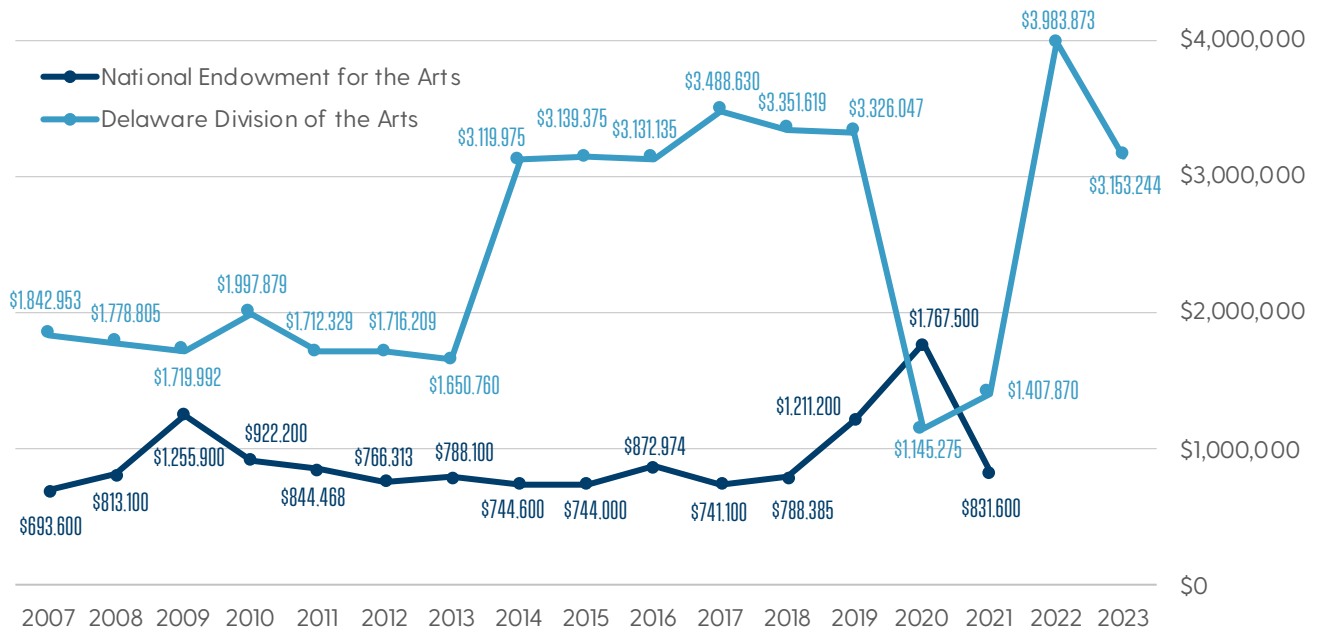
Source: Occupational Employment Statistics Data, 2007–2021, Bureau of Labor Statistics, <https://www.bls.gov/oes/tables.htm>

Figure 11. Number of Participants in the Freeman Arts Pavilion's Arts in Education Program, 2010–2022



Source: 2010–2022 Joshua M. Freeman Foundation annual reports, <https://freemanstage.org/support-sponsorship/financial-accountability>.

Figure 12. Grants from the Delaware Division of the Arts and National Endowment for the Arts to Organizations in Delaware, 2007–2023



Sources: Delaware Division of the Arts and National Endowment for the Arts, 2022.
Note: National Endowment for the Arts data were only available until fiscal year 2021.

End Notes

1. For examples of studies on the value of arts exposure, see “An unexpectedly positive result from arts-focused field trips,” <https://www.brookings.edu/blog/brown-center-chalkboard/2018/02/16/an-unexpectedly-positive-result-from-arts-focused-field-trips-in-school/> and “Research Matters / Does Arts Education Matter?” <http://www.ascd.org/publications/educational-leadership/dec18/vol76/num04/Does-Arts-Education-Matter%C2%A2.aspx>.
2. For details on the Joshua M. Freeman Foundation and programming by the Freeman Arts Pavilion, see 2010–2021 Joshua M. Freeman Foundation annual reports available here: <https://www.freemanarts.org/support-sponsorship/our-accountabilities>.
3. For more information on IMPLAN data and the IMPLAN modeling process, visit IMPLAN.com.
4. Cheney, Phil. “Indirect effects.” IMPLAN Support Site, IMPLAN Group, LLC, 2021, <https://support.implan.com/hc/en-us/articles/115009499547-Indirect-effects>.
5. Cheney, Phil. “Induced effects.” IMPLAN Support Site, IMPLAN Group, LLC, 2021, <https://support.implan.com/hc/en-us/articles/115009668568-Induced-Effects>.
6. For a discussion of common flaws and oversights in economic impact studies, see “The false profits of economic impact: beware the big number” https://www.richmond.com/opinion/their-opinion/sarah-lyon-hill-albert-alwang-and-bob-mcnab-column-the/article_e55ba529-f7bf-5c86-9fb0-41b28cc6e9f7.html and “Realistic local job multipliers,” https://research.upjohn.org/up_policybriefs/8/.
7. See “Determining Economic Contributions and Impacts: What is the difference and why do we care?” for details on the differences among terms including economic contributions and economic impacts, <https://jrap.scholasticahq.com/article/9291.pdf>.
8. For information on the previous analysis and methods, see Mix, Troy, and Ellen Schenk. *Comprehensive Impact Analysis of The Freeman Stage*. Institute for Public Administration, University of Delaware, <https://udspace.udel.edu/items/1a262495-0c19-4377-b8ec-67d8cec3223b>, (2019).
9. To avoid counting spending by local residents that would otherwise be spent on other local goods and services, impact studies often simply ignore local resident spending when estimating economic contributions and net economic impacts. Cobb and Weinberg (1993) argue that this approach undercounts contributions and impacts by neglecting to account for local resident spending that otherwise would have happened outside of the region. In recognition of the lack of entertainment venues comparable to the Freeman Arts Pavilion in Delaware, and particularly in Sussex County, IPA analysts selected 50 percent as a reasonable indicator of the degree to which local resident spending on the Freeman Arts Pavilion actually substitutes for spending that would have otherwise occurred outside the region, with 50 percent being a share that Cobb and Weinberg (1993) advance as reasonable for similar situations. See Steven Cobb and David Weinberg. “The importance of import substitution in regional economic impact analysis: Empirical estimates from two Cincinnati area events.” *Economic Development Quarterly* 7, no. 3 (1993): 282–286.
10. See “CPI Inflation Calculator,” <https://data.bls.gov/cgi-bin/cpicalc.pl>.
11. The Urban Institute (2006). *Cultural Vitality in Communities: Interpretations and Indicators*, <https://www.urban.org/sites/default/files/publication/50676/311392-Cultural-Vitality-in-Communities-Interpretation-and-Indicators.PDF>.
12. *ibid*
13. *ibid*
14. For a listing of NAICS codes considered for this analysis, see “Arts-Related NAICS Codes” in Appendix C.
15. See Figure C-1. Percent Change in Absolute Number of Arts Establishment Per 1,000 Population, 2007–2016.

16. See “Arts-Related SOC Codes” in Appendix C for a listing of Standard Occupational Classification (SOC) codes used to define arts employment for this study.
17. See “Arts-Related NTEE-CC Categories” in Appendix C for a listing of National Taxonomy of Exempt Entities Core Codes (NTEE-CC) used for this measure.
18. See Figure C-2. Percent Change in Nonprofit Arts Organizations Per 1,000 Population, 2007–2018.
19. The Urban Institute (2006). Cultural Vitality in Communities: Interpretations and Indicators. Retrieved from <https://www.urban.org/sites/default/files/publication/50676/311392-Cultural-Vitality-in-Communities-Interpretation-and-Indicators.PDF>.
20. Delaware Department of Education, Delaware Standards for Visual & Performing Arts. Retrieved May 2019 from <https://www.deartsstandards.org>.
21. See 2010–2021 Joshua M. Freeman Foundation annual reports, <https://freemanstage.org/support-sponsorship/financial-accountability>.
22. See 2010–2021 Joshua M. Freeman Foundation annual reports, <https://freemanstage.org/support-sponsorship/financial-accountability>.

Appendix A: Attendee Survey and Selected Responses

Attendee Survey

Note: Four versions of this survey were sent, each for one of the four performances that were assessed. The only differences across all these surveys were the closing dates, the dates of the performances, and the performers.

Version 1: Elvis Costello & The Imposters

- Closing Date: August 29th
- Date of the Performance: August 19th

Version 2: Face 2 Face: A Tribute to Elton John & Billy Joel

- Closing Date: September 5th
- Date of the Performance: August 27th

Version 3: First State Ballet Theatre

- Closing Date: September 13th
- Date of the Performance: September 1st

Version 4: John Fogerty

- Closing Date: September 19th
- Date of the Performance: September 10th

This survey should take approximately 10 minutes. Your responses are voluntary and completely confidential.

At the end of the survey, there is a space to enter your email for the chance to win one of four \$25 Amazon gift cards.

This survey will close on <<Closing Date>> at 11:59 PM.

If you have any questions about this survey, please contact Troy Mix (mix@udel.edu; 302-831-6191). If you have any questions or concerns about your rights as a research participant, please contact the University of Delaware's Institutional Review Board (hsrb-research@udel.edu; 302-831-2137).

By choosing the "I consent" option below, you acknowledge that your participation in the study is voluntary and that you are aware that you may choose to terminate your participation in the study at any time and for any reason.

- ☐ I consent, begin the study
- ☐ I do not consent, I do not wish to participate

1. Are you 18 years or older?

- ☐ Yes
- ☐ No

2. Did you attend <<Performer(s)>>, on <<Date of Performance>> at the Freeman Arts Pavilion?

- ☐ Yes
- ☐ No

3. What is the zip code of your primary residence?

4. What is the approximate one-way distance, in miles, from your home to The Freeman Arts Pavilion?

Thinking about the <<Performer(s)>> event, <<Date of the Performance>> that you attended at The Freeman Arts Pavilion...

5. Including yourself, how many people attended this event with you?

6. How many of these people were under the age of 13?

7. How many of these people were between the ages of 13 and 17?

8. How many of these people were 65 or older?

9. How many of the people in your party live 50 or more miles away from The Freeman Arts Pavilion?

10. What was your age at the time of the event?

11. Approximately how much did you pay for tickets for your entire party?

- ☐ \$0
- ☐ Less than \$50
- ☐ \$50-\$100
- ☐ \$100-\$200
- ☐ \$200-\$300
- ☐ \$300+

12. Did you buy any food or beverage at the Freeman Arts Pavilion during this event?

- ☐ Yes
- ☐ No

13. Approximately how much did your entire party spend on food at The Freeman Arts Pavilion?

- ☐ Less than \$10
- ☐ \$10-\$20
- ☐ \$20-\$30
- ☐ \$30-\$40
- ☐ \$40+

14. Thinking about your attendance at <<Performer(s)>>, on <<Date of Performance>>, was this performance at the Freeman Arts Pavilion your main reason for visiting coastal Sussex County?

- ☐ Yes
- ☐ No

15. Why not?

- ☐ Live in area
- ☐ On vacation
- ☐ In the area for another even
- ☐ Other (please specify) _____

16. Did you stay overnight in the area as part of your visit to The Freeman Arts Pavilion for the <<Performer(s)>>, on <<Date of Performance>>?

- ☐ Yes
- ☐ No

17. If so, for how many nights?

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4+

18. Thinking about your visit to the Freeman Arts Pavilion and surrounding area for the <<Performer(s)>>, on <<Date of Performance>>, approximately how much money (in dollars) did you spend in the following categories?

	In Sussex County	Outside Sussex County
Hotel/motel/other lodging	\$ _____	\$ _____
Grocery and other retail stores	\$ _____	\$ _____
Restaurants and drinking places (not including The Freeman Arts Pavilion)	\$ _____	\$ _____
Outdoor recreational activities	\$ _____	\$ _____
Entertainment (not including The Freeman Arts Pavilion)	\$ _____	\$ _____
Transportation (e.g. gas, rental car)	\$ _____	\$ _____

19. How likely is it that you will attend more events at The Freeman Arts Pavilion?

Not Likely	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very Likely
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20. Please indicate your level of agreement with each item.

	Strongly Disagree	Disagree	Neither Disagree nor Agree	Agree	Strongly Agree
The Freeman Arts Pavilion provides arts and cultural entertainment that would be missing otherwise.		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Freeman Arts Pavilion creates opportunities for positive social interactions in the community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Select Survey Responses

Figure A-1. Responses to the Question "How likely is it that you will attend more events at the Freeman Arts Pavilion?"

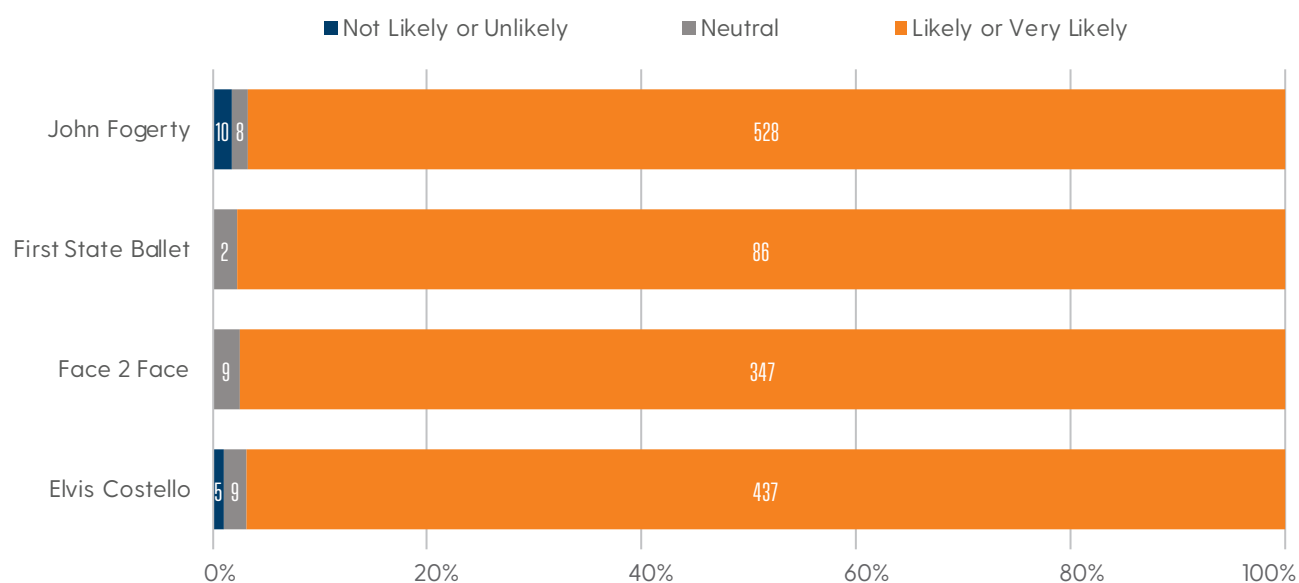


Figure A-2. Responses to the statement "The Freeman Arts Pavilion provides arts and cultural entertainment that would be missing otherwise."

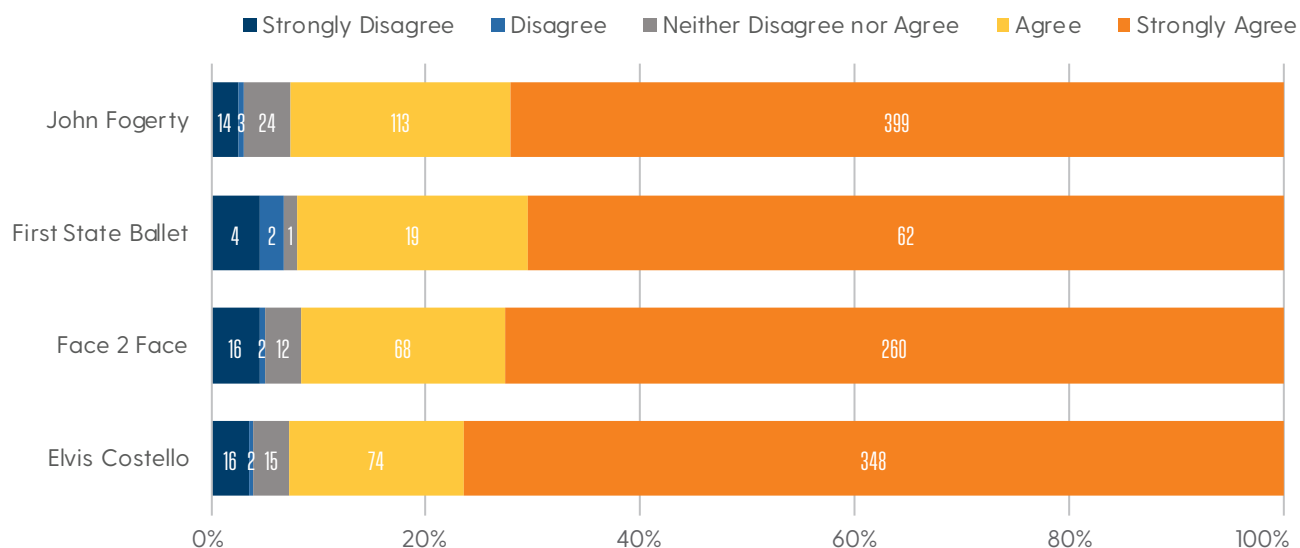


Figure A-3. Responses to the statement "The Freeman Arts Pavilion creates opportunities for positive social interactions in the community."

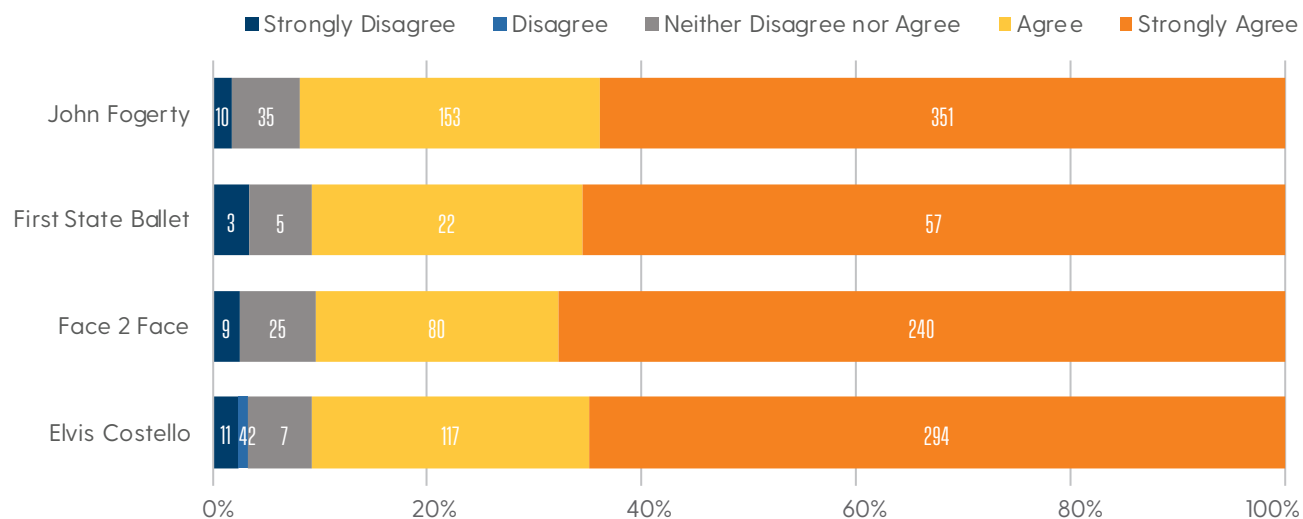
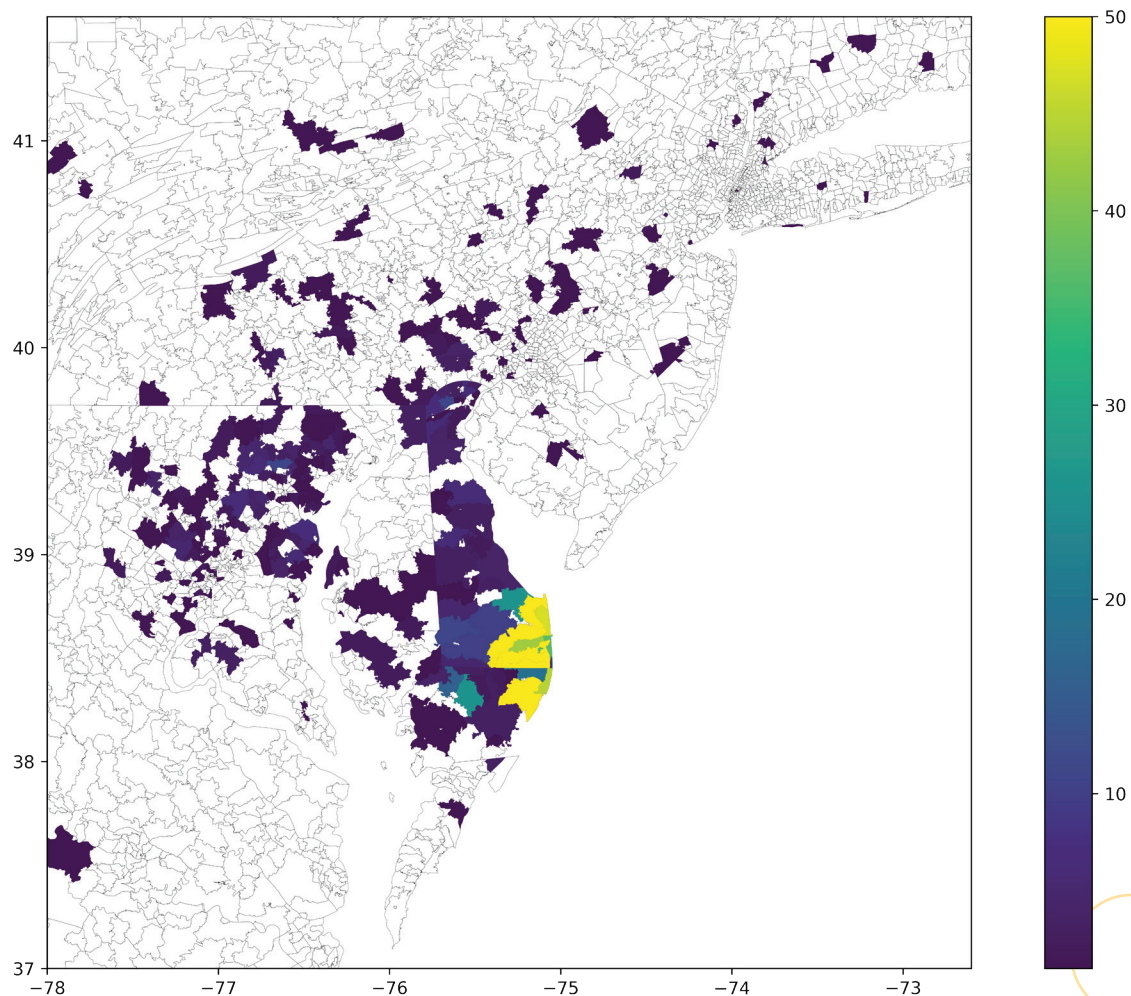


Figure A-4. Number of Parties per Zip Code



Appendix B: Supplementary Cultural Vitality Data

Arts-Related North American Industry Classification System (NAICS) Codes

Arts Organizations

- Theatre companies and dinner theatres: 711110
- Dance companies: 711120
- Musical groups and artists: 711130
- Other performing arts companies: 711190
- Motion picture theatres: 512131
- Museums: 712110
- Historical sites: 712120
- Zoos and botanical gardens: 712130

Art Schools: 611610

Independent Artists: 711510

Ancillary Arts Participation Venues

- **Bookstores: 451211**
- **Music stores: 451220**
- **Video rental stores: 532230**

Retail Art Dealerships: 453920

Arts-Related Standard Occupational Classification (SOC) Codes

- Art directors: 27-1011
- Fine artists, including painters, sculptors, and illustrators: 27-1013
- Multimedia artists and animators: 27-1014
- Photographers: 27-4021
- Camera operators, television, video, and motion picture: 27-4031
- Actors: 27-2011
- Producers and directors: 27-2012
- Dancers: 27-3031
- Choreographers: 27-2032
- Music directors and composers: 27-2041
- Musicians and singers: 27-2042
- Writers and authors: 27-3043

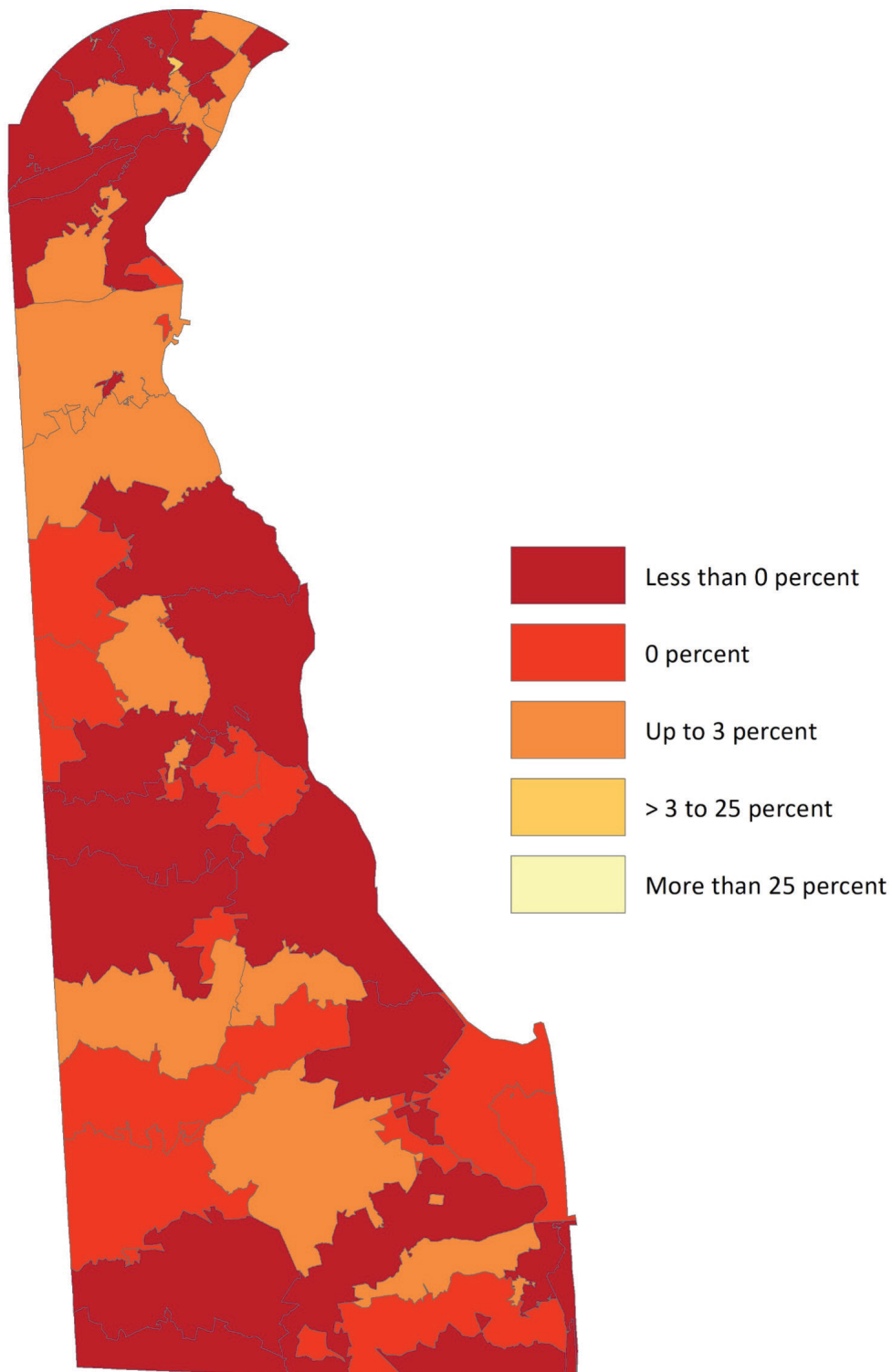
Arts-Related National Taxonomy of Exempt Entities Core Codes (NTEE-CC)

- Support organizations: A01, A02, A03, A05, A11, A12, and A19
- Arts and culture organizations: A20, A23, A24, A25, and A26
- Media and communications: A30, A31, A32, A33, A34, and A40
- Museums: A50, A51, A52, A54, A56, and A57
- Performing arts: A60, A61, A62, A63, A65, A68, A69, A6A, A6B, A6C, and A6E
- Other arts, culture, and humanities nonprofits: A70, A80, A82, A90, and A99



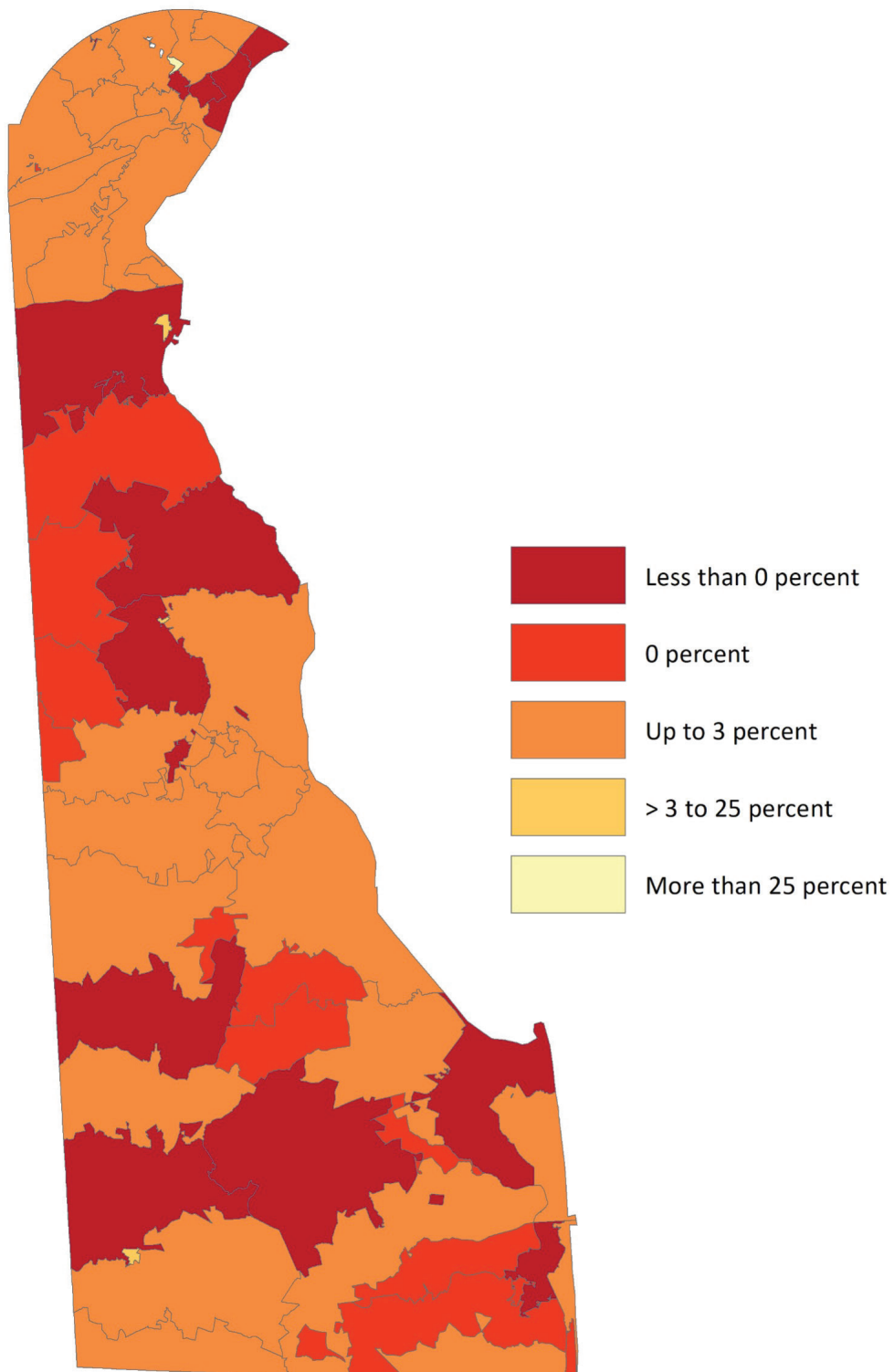
Maps of Changes in Cultural Vitality Conditions

Figure B-1. Percent Change in Absolute Number of Arts Establishment Per 1,000 Population, 2007–2016



Source: ZIP Codes Business Patterns, U.S. Census Bureau, 2007 and 2016.

Figure B-2. Percent Change in Nonprofit Arts Organizations Per 1,000 Population, 2007–2018



Source: The National Center for Charitable Statistics (NCCS) database at the Urban Institute, 2019.



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