



Economic & Community Impact Report

Executive Summary *Prepared March 2020*

St. Louis Symphony Orchestra
stéphane denève : music director



SAINT LOUIS UNIVERSITY

—
URBAN PLANNING AND DEVELOPMENT



About the St. Louis Symphony Orchestra

Celebrated as one of today's most exciting and enduring orchestras, the St. Louis Symphony Orchestra is the second-oldest orchestra in the country, marking its 141st year with the 2020/2021 season and its second with Music Director Stéphane Denève. Widely considered one of the world's finest orchestras, the SLSO maintains its commitment to artistic excellence, educational impact, and community connections—all in service to its mission of enriching lives through the power of music.

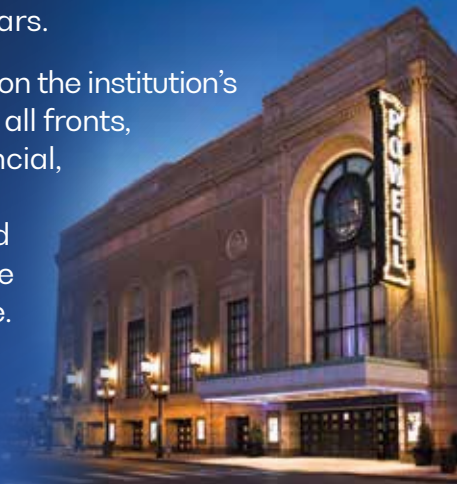
The SLSO musical family includes two resident choruses: the St. Louis Symphony Chorus, founded in 1976 by Music Director Jerzy Semkow; and the St. Louis Symphony IN UNISON Chorus, an ensemble focused on the music of African-American and African cultures founded in 1994; and also the St. Louis Symphony Youth Orchestra, founded by Conductor Laureate Leonard Slatkin in 1970.

In addition to its regular concert performances at Powell Hall, which has been the permanent home of the SLSO for more than 50 years, the orchestra is an integral part of the diverse and vibrant St. Louis community, presenting dozens

of free education and community programs and performances throughout the region each year. It presents *St. Louis Symphony: Live at the Pulitzer*, a four-program series at the Pulitzer Arts Foundation. The SLSO also serves as the resident orchestra for Opera Theatre of Saint Louis.

The Grammy Award-winning SLSO's impact beyond the St. Louis region is realized through weekly Saturday night concert broadcasts on St. Louis Public Radio, acclaimed recordings, and regular touring activity. A sought-after artistic partner by preeminent musicians and composers from across the globe, as well as by local and national organizations, the SLSO enjoys a long history of robust and enduring artistic collaborations that have developed and deepened over the years.

Today, the SLSO builds on the institution's current momentum on all fronts, including artistic, financial, audience growth, and community impact, and looks toward the future with Stéphane Denève.





The St. Louis Symphony Orchestra, founded in 1880, is the second-oldest orchestra in the United States.

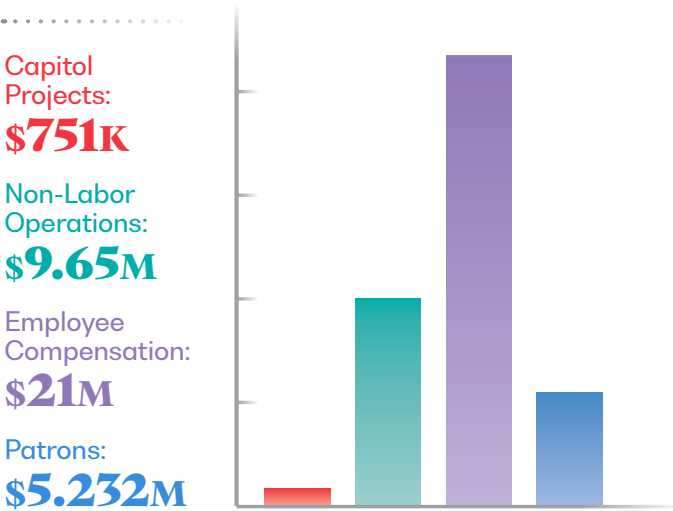
Over the last 140+ years, the SLSO has become renowned worldwide and is an integral part of the St. Louis region’s cultural, educational, and economic networks. A team from the Saint Louis University Urban and Planning Development department, led by Assistant Professor Robert Lewis, compiled this report based on data for the fiscal years 2016 through 2019 to detail the significant economic and community impact of the SLSO on the region.

Note: this study was completed in March 2020 before the COVID-19 pandemic.

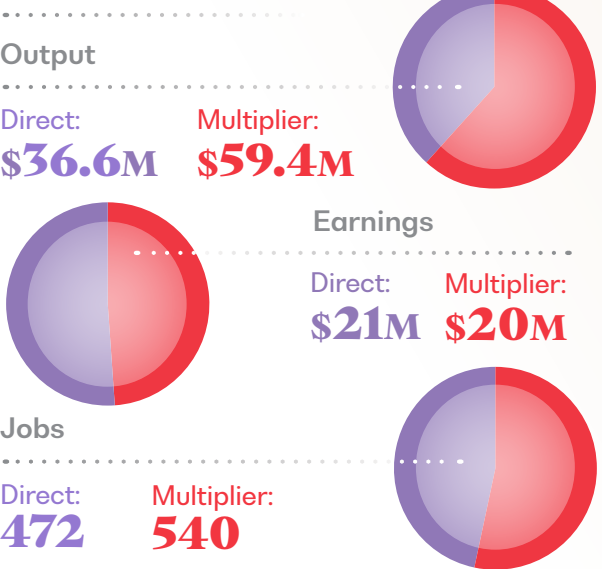
The SLSO is a powerful economic engine for the region

- Spending by the SLSO and its patrons **triggers \$96.1 million in metro-wide economic activity each year. This activity supports almost \$41 million in household earnings and 1,012 jobs.**
- The SLSO** ranks as one of the top orchestras in the U.S., **spending an average of \$31.4 million per year for operations, employee compensation, and annual capital improvements.**
- Patrons spend an additional \$5.2 million per year** in the regional economy that can be attributed directly to their participation in SLSO events.
- This \$36.6 million in annual spending triggers \$96.1 million in annual economic activity throughout the St. Louis region.**

SLSO Direct Spending in an Average Year, 2016-2019 **Total: \$36,633,000**



Direct & Multiplier Effects SLSO in Metropolitan St. Louis



The SLSO delivers more than expected

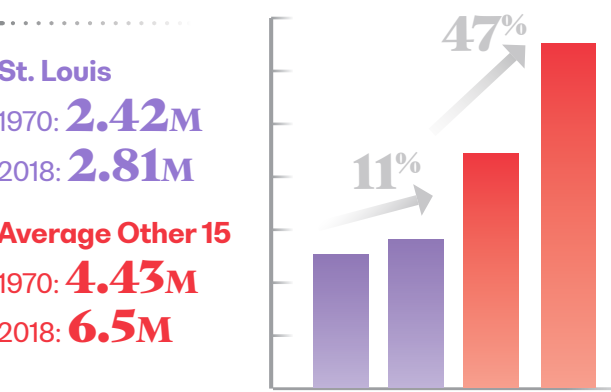
While St. Louis comprises 0.9 percent of the U.S. population, the SLSO produces well more than one percent of the nation’s orchestra-related events and attracts more than one percent of the nation’s audiences.

According to the League of American Orchestras (League), the orchestra field contributed \$1.8 billion to the U.S. economy in 2014. Thus, about 1.6 percent of the nation’s spending by orchestras can be attributed to the SLSO. Metropolitan St. Louis made up about 0.9 percent of the nation’s population and 0.9 percent of the nation’s personal income. **Therefore, the SLSO’s spending represented a much larger proportion of the nation’s spending by orchestras than population or income would suggest.**

St. Louis is one of the country’s top 16 symphony cities. St. Louis has been a sluggishly growing metro area for several decades, with 11 percent average growth from 1970 to 2018, while the other top 15 symphony cities averaged 47 percent growth.

Macroeconomic measures broadly indicate that St. Louis is relatively struggling because its growth pace trails other large metropolitan areas. **This puts increasing pressure on fundraising and both public and private support for maintaining a world-class orchestra.**

Population of Metro St. Louis Compared to Average of Other Top Symphony Metros
Source: US Census Bureau



The SLSO makes a meaningful impact on the St. Louis community

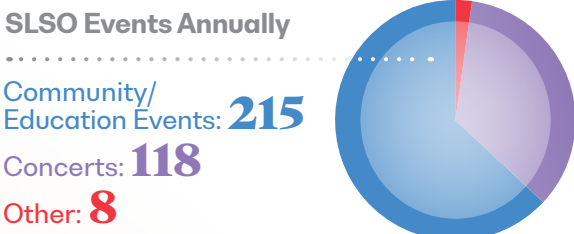
The SLSO impacted 74,000 youths in FY2019. This was an increased and purposeful effort, accomplished through a combination of education concerts at Powell Hall, in-school programs, teacher training, the Youth Orchestra, and other activities.

The SLSO delivered about 1.3 percent of the national total of orchestra education in 2014, again delivering greater impact than the metro area’s share of the nation’s population or personal income. These 257 free community and educational programs attracted a total audience of 45,960, or almost 180 per program—higher than the national average of 110 participants.



The SLSO expands audience reach

The SLSO hosts an average of 340 events per year and averages 262,400 patrons and participants per year.



Notably, there was a 5.5 percent increase in attendance between 2016 and 2019, with average patronage and participation at all SLSO events increasing 25 percent from 690 in 2016 to 860 in 2019.

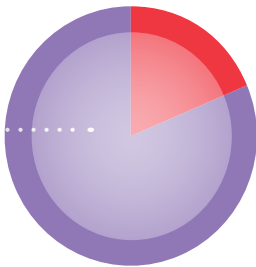
While recent patrons have come from 49 states (only Delaware is missing) and several other countries, nine out of ten SLSO patrons live in the St. Louis region, with eight out of ten St. Louis patrons living on the Missouri side. With expanded national and international attention, the SLSO is poised to grow its status as a valuable export and a destination for visitors who bring new dollars into the region

Moreover, the SLSO is a Missouri symphony orchestra. While Missouri is home to 81.2 percent of all patrons, Illinois is home to 14.7 percent, including locations outside of the

Metro East. Chicago, both Springfields, Peoria, Columbia, and Kansas City have small but notable concentrations.

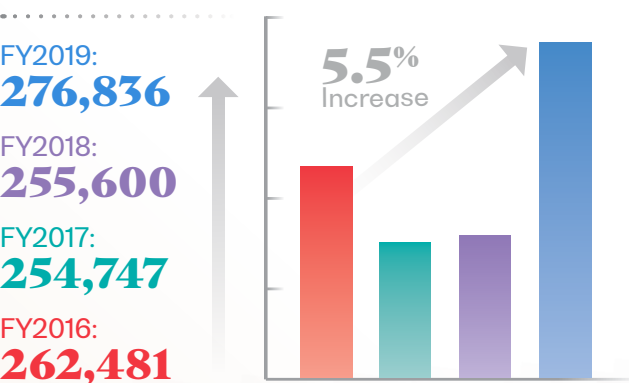
Share of SLSO Patrons Who are Residents of Missouri

In Missouri: **81.2%**
Out of State: **18.8%**



While the SLSO is one of the best and largest orchestras in the U.S., the metro area has been a relatively slow growing market for several decades when compared to the SLSO’s peers. A challenge for SLSO leaders and for all of greater St. Louis is to increase the rate of economic and demographic growth and to continue the creative deployment of available resources to support the cultural, educational, and economic asset that is the St. Louis Symphony Orchestra.

St. Louis Symphony Orchestra Patrons, 2016-2019
Source: SLSO, 2019





To read the full report, visit **slso.org/impact**.

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