Dear Ms. Bernard:

On behalf of Saint Louis University, we are glad to provide you with the accompanying report on the economic and community impact of the St. Louis Symphony Orchestra. The geographic focus is on the bi-state St. Louis metropolitan area and on the state of Missouri.

The SLSO is a $31.4 million organization on an average annual basis and employs more than 650 people in a wide variety of positions. In addition, the SLSO’s 600+ volunteers contribute an average of 80,000 hours annually to symphony projects. The SLSO serves more than a quarter-million patrons and participates in an average year, including over 73,000 youths. These people spend another $5.2 million in the St. Louis economy that can be attributed to their patronage of SLSO events. Moreover, the SLSO has had impressive success in increasing patronage in the last few years. Participation at the variety of SLSO events per year increased 25 percent, from an average attendance of 670 in 2016 to 860 in 2019, as a result of deliberate efforts to adjust and modify programs, both at Powell Hall and elsewhere in the region, that are most impactful for the organization and, more importantly, for all the people enjoying and learning from the SLSO’s events.

In turn, the SLSO triggers an additional $59.4 million in economic activity, resulting in $96.1 million total activity in a wide range of economic sectors in metropolitan St. Louis. The multiplier, therefore, exceeds 2.6—an impressive result when compared to the other sectors of the regional and state economies. This multiplier effect also supports an additional 540 jobs in the metro area. That impact could be higher if the SLSO could significantly increase the number of non-St. Louisans who partake in SLSO events. Non-metro residents bring “new money” into the region that can recirculate for expanded economic impact. Moreover, the SLSO has had impressive success in increasing patronage in the last few years. Participation at the variety of SLSO events per year increased 25 percent, from an average attendance of 670 in 2016 to 860 in 2019, as a result of deliberate efforts to adjust and modify programs, both at Powell Hall and elsewhere in the region, that are most impactful for the organization and, more importantly, for all the people enjoying and learning from the SLSO’s events.

It has been a joy to work with you and your staff to evaluate all these numbers and better understand the operations and scale of the SLSO. We look forward to opportunities to assist you in the future.

Respectfully submitted on behalf of Saint Louis University,

Robert M. Lewis, FAICP, CEcD
Assistant Professor, Urban Planning & Development
Independent Consultant in Urban Planning & Development

Mary Celeste Kennedy
Graduate Assistant
SLU Urban Planning & Development

March 12, 2020

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Note: this study was completed in February 2020 before the COVID-19 pandemic.
Executive Summary

The St. Louis Symphony Orchestra (originally the St. Louis Choral Society) was formed in 1880 and is the second-oldest major orchestra in the United States, behind only the New York Philharmonic, which was established in 1842. Over the last more than 140 years, the SLSO has become renowned worldwide and is a crucial part of St. Louis’ cultural, educational, and economic networks. This report documents and illustrates many of the statistics that demonstrate the community and economic scale of the SLSO. Findings in this report focus on annual average data for the four fiscal years of 2016 through 2019. The average is a useful measure that accounts for statistical changes from year to year which, by themselves, might not adequately reflect a typical year. The report also shows much of the individual year data for comparison purposes.

Economic and community impacts are described for two geographic areas: the bi-state St. Louis metropolitan area, which is the primary market for SLSO events; and the State of Missouri. Impacts are triggered by the SLSO’s direct annual spending to support its operations, by the number of jobs it supports for those operations, and by its variety and number of events and programs.

The SLSO spends an average of $31.4 million per year (2019 dollars) for operations, employee compensation, and a modest amount of annual capital improvements. This ranks it as one of the very top orchestras in the U.S.

Patrons of SLSO events spend an additional $5.2 million per year in the regional economy that can be attributed directly to their participation in those events.

These direct and indirect impacts support just over 1,000 jobs in the St. Louis area economy.

The average SLSO job pays about $44,500 per year and the average “multiplier job” pays $37,000 (2019 dollars).

This $36.6 million in annual spending triggers some $96.1 million in annual economic activity throughout metro St. Louis.

Of that amount, $41 million becomes incomes for households. The rest, for all intents and purposes, becomes incomes for other businesses—for profit and non-profit—as well as taxes and fees paid to governments.

The SLSO hosts an average of 340 events per year. Fluctuations over the four years are the result of strategic adjustments that reflect the most effective events for attracting audiences and educating the public.
Nine out of ten SLSO patrons live in metropolitan St. Louis. Statistically speaking, the SLSO’s multipliers could be higher if more of its patrons and ticket buyers were from outside the metro area or state. This would make the SLSO more of an “export” business that brings outside money into the region that can then recirculate within the region, thus creating a higher multiplier.

Almost eight out of ten St. Louis metro patrons live on the Missouri side. This is almost consistent with the population distribution within the metropolitan area but favors Missouri by a small amount. Three quarters of the metro population lives in the seven counties in Missouri (actually six counties plus the city of St. Louis), and one quarter live in the eight counties of Illinois.

Recent patrons have also come from 49 states and several other countries. While the St. Louis Symphony Orchestra is one of the best and largest symphonies in the U.S., the metro area has been a relatively slow growing market for several decades when compared to the SLSO’s peers. St. Louis is one of the country’s top 16 symphony cities. There are surely many more people in the metro area who can be attracted to SLSO events and who can benefit from SLSO educational programs. Recent improvements in patronage and participation demonstrate this. Continued market growth potential is, therefore, optimistic. But relatively sluggish population and economic growth might also be deemed a future hindrance among funders and other supporters if allowed to become adverse factors in attracting top musicians and expanding audiences. St. Louis is the 20th most populated metro area in the U.S. (among 380 metros), though this ranking has gradually diminished. A challenge for SLSO leaders and, indeed, for all of greater St. Louis, is to increase the rate of economic and demographic growth but also to continue the creative deployment of available resources in support of the incredible cultural, educational, and economic asset that is the St. Louis Symphony Orchestra.

The SLSO directly 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.

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Background and History of the SLSO

When the St. Louis Symphony Orchestra was formed in 1880, St. Louis was on the cusp of its golden age. The city had established its current boundaries four years before in 1876 and boasted other cultural hallmarks as the Saint Louis Art Museum (1879), the Missouri Botanical Garden (1860), and a zoological garden (1876), which would later become the St. Louis Zoo.

By the 1880 census, St. Louis had grown to a population of 350,000 and “was alive with the magnetic aura of purpose and grandeur.”

The award-winning SLSO is the country’s second-oldest major orchestra, preceded only by the New York Philharmonic, which was established in 1842, and followed shortly by the Boston Symphony Orchestra (1881) and the Chicago Symphony Orchestra (1891).

Just as in these other cities, the SLSO has been an important signifier of its city’s vibrance since its inception. Around 1907, when the symphony’s name changed from the St. Louis Choral Symphony to the St. Louis Symphony Society, the symphony hired its first group of professional musicians for a 20-week regular season and has continued to support the professional tenure of hundreds of musicians ever since.

In 1976, the SLSO was a 46-week orchestra. Starting with the 1977/1978 season, the SLSO became a 52-week orchestra for 24 years until 2001 when the institution reduced the season to 42 weeks. Since 2009, the orchestra season has been 43 weeks, including eight weeks as the resident orchestra for Opera Theatre of Saint Louis—a partnership that began in 1978.

Out of the 1,224 orchestras in the United States today, only one-fifth of them have professional (paid) musicians. The long history of the SLSO and its investment in professional musicians demonstrates the symphony’s dedication to the arts and to the community. In the 1970s and 80s, the SLSO’s national presence increased notably with the tenure of new Music Director Leonard Slatkin. Time Magazine called the SLSO the second-best orchestra in the country in 1983. Shortly thereafter, the SLSO introduced a composer-in-residence program to foster the creation of new American music. With such strides, the SLSO became known as a leader in contemporary American music and has won nine out of 60 Grammy Award nominations for its recordings of classical music, most recently for Best Orchestral Performance in 2015 for the recording of John Adams’ City Noir.

The SLSO has inhabited a few temporary homes in the city. Its earliest performances were in the St. Louis Mercantile Library in downtown St. Louis, and later moved to the Kiel Opera House (now the Stifel Theatre). Constructed in 1925 as the St. Louis Theatre, what is now Powell Hall was acquired by the SLSO in 1966 and renamed for Walter S. Powell. After an extensive two-million-dollar renovation, the orchestra moved in 1986 into its first and only permanent home. Renowned violinist Isaac Stern said in interviews with the St. Louis Post-Dispatch and the St. Louis Globe-Democrat that, “[Powell Hall] has warmth that enhances a performance... a pleasure for a musician. Powell Hall is first-rate. It ranks with Carnegie Hall in New York and Symphony Hall in Boston.” Today, the SLSO housed in Powell Hall is a cultural anchor in not just Grand Center, but for the entire St. Louis region.

Early in its history, the SLSO helped develop local talent and shared music with the community at large. In 1921, the SLSO began inviting local school children to its performances, becoming one of the first orchestras to institute an education program in the country. In 2017, more than 23,400 students attended education concerts at Powell Hall. In 2021, the SLSO will celebrate 100 years of its education concerts and continue making them increasingly accessible to all students.

In 1970, the SLSO and then Assistant Conductor Leonard Slatkin founded the St. Louis Symphony Youth Orchestra, which has been recognized for its professional-level repertoire. The Youth Orchestra provides training and mentorship for aspiring young artists from professional musicians and performs three public concerts each season. With 2,500 alumni, the Youth Orchestra has had a profound impact on the development of students and musicians locally and nationally. In fact, there are six YO alumni who are current SLSO musicians.

Additional performing ensembles of the SLSO include the St. Louis Symphony Chorus (founded in 1976) and the St. Louis Symphony IN UNISON Chorus (founded in 1994). The latter is a unique ensemble that dedicates itself to performing music of African and African-American cultures.

The SLSO continues to reach new audiences with events like its free annual concert in Forest Park and the new SLSO Crafted series, which partners with local eateries like its free annual concert in Forest Park and the new SLSO Crafted series, which partners with local eateries to offer a happy hour concert where the audience and musicians mingle. The SLSO is deeply connected to and invested in the St. Louis community, collaborating with many local institutions such as St. Louis Public Radio, Classic 107.3, the Nine Network, Opera Theatre of Saint Louis, The Muny, Forest Park, the St. Louis Blues National Hockey League team, the Pulitzer Foundation, COCA, and The Black Rep. In the early 1990s, the SLSO created the IN UNISON program, partnering with more than 35 African-American churches in the St. Louis region to bring orchestral music to houses of worship at no cost. Community programs and partnerships that take the SLSO where people live, work, learn, and worship have connected the SLSO with colleges in the region, Mosaic and the International Institute, SLU Cancer Center, Scott Air Force Base, Fort Leonard Wood, and Maryville University music therapy programs, among others.

As the SLSO begins the next chapter of its storied 140-year history with the vision of President and CEO Marie-Hélène Bernard and Music Director Stéphane Denève, it will continue to improve and diversify events, outreach, and partners that make music accessible to all, share classical music in modern and inclusive contexts, and reinforce the significance of the SLSO and classical arts in the region—all to enrich lives through the power of music.
Profile: Powell Symphony Hall at 50: From Movie Palace to Acoustical Gem

Sarah Bryan Miller

On Jan. 20, 2018, the St. Louis Symphony Orchestra celebrates the 50th anniversary of the opening of its home, Powell Symphony Hall, with a daylong celebration.

Originally the St. Louis Theater, designed by the Chicago-based architectural firm Rapp and Rapp, the venue started its life in 1925 as a movie and vaudeville house. In 1966, longtime SLSO leader and benefactor Oscar Johnson Jr. gave $500,000 to purchase the theater for the orchestra.

Fittingly, “The Sound of Music” was the last film to be shown in its first incarnation.

Then-SLSO executive director Peter Pastreich oversaw the $2 million renovation of what became Powell Symphony Hall. Pastreich, who hated coatrooms, was responsible for the lockers that line the halls; unfortunately, he also got rid of the old theater’s pipe organ.

The musicians who work at Powell appreciate the venue in which they get to perform.

“It’s known worldwide as one of the best halls in the country,” says associate principal clarinet Diana Haskell. “Acoustically, it’s just a very warm place to play, not to mention that it’s really beautiful.

“I remember the first time I walked into the hall: I looked out and thought, ‘What a glorious place to make music!’ It’s hard to imagine that a hall built for movies is a great hall for music — but it is. It’s an awe-inspiring hall, a beautiful place to play, and I think that has something to do with our sound. We’re really blessed.”

The hall is named for Walter Sidney Powell, an executive at Brown Shoe, who was a lover of the St. Louis Symphony Orchestra, opera and ballet. His second wife, Helen Lamb Powell, was the head nurse anesthetist at what was then Barnes Hospital; they shared a love of figure skating.

Powell was president of U.S. Figure Skating in the mid-1940s, the first American officer of the International Skating Union, and a judge at many important competitions. He was to referee the 1961 world skating competition in Prague; tragically, he and the American team died in a plane crash on the way there. He was 81.

At the time, the SLSO badly needed a new home. The orchestra played for years at the Kiel (now Peabody) Opera House. When the opera house was no longer available, the orchestra performed for a time in the Khonnsan Room of the Chase Hotel.

Helen Lamb Powell followed her late husband’s wishes and made the SLSO the beneficiary of a $1 million charitable trust. That helped to match a $2 million Ford Foundation grant to endow Powell Hall.

The renovated hall, with 2,689 seats, was designed by the St. Louis architectural firm Wedemeyer, Cernik & Corrubia, with consulting work by Ben Schlanger, a specialist in theater architecture who had recently finished work on the new Metropolitan Opera House in New York. A noted acoustician, Cyril Harris (who also worked on the Kennedy Center), oversaw the acoustics.

Unusually for an American hall in the 1960s, Powell Hall was done up in a traditionally European style, with its red, gold and cream decor modeled on the royal chapel at Versailles. Still remaining from the old movie palace is the front facade’s stained-glass window of St. Louis, the crusader King Louis IX of France.

Powell Symphony Hall opened Jan. 24, 1968 and got raves from musicians (two of whom are still members of the SLSO, double bass player Donald Martin and French horn Lawrence Strieby), as well as critics and audiences. Violinist Isaac Stern compared it to New York’s fabled Carnegie Hall.

Powell Hall, entered into the National Register of Historic Places in 2001, was the first element of what is now Grand Center.

The building is also noted for what some believe is paranormal activity. Stagehands and others have long reported encounters with a spectral vaudevillian in a white top hat and tails, dubbed “George.” In 2010, the SLSO invited the St. Louis Ghost Hunters Society to check it out.

They heard some hard-to-explain things during their overnight visit, including a voice whispering “Richard,” an alleged encounter with a female spirit (“She doesn’t like to be called George,” one said) in the old projection booth, and, in the lower-level Whitaker Room, a phone that rang just once after a member of the group asked for a sign.


The nights were always bright from the immense holiday season marquee bulb displays gracing such majestic movie theaters as Shubert, the 3,600-seat St. Louis Mayer to become Powell Hall, the 2,800-seat Movieland, and the palatial Fox. The Fox was the nation’s second largest theater when it was opened in 1929 with 6,080 seats; it cost about $30 million to build.
Challenges and Changes in the Arts and Orchestra Industry

U.S. Orchestra Facts 2006-2014 Compared to the SLSO

An extensive survey of symphony orchestras in the United States was published by the League of American Orchestras in 2016. Data collected and analyzed covered the years 2006 through 2014. This report provides useful insights into the scale and challenges of symphony orchestras that enables the operations and economic impact of the St. Louis Symphony Orchestra to be evaluated in a larger context.

As of 2014, the League of American Orchestras (League) found there were 1,224 U.S. orchestras distributed widely across the U.S. In that year, the orchestra field contributed $1.8 billion to the U.S. economy in direct payments for goods and services. As analyzed in this report, the St. Louis Symphony Orchestra (SLSO) spent $28.9 million to operate the symphony and its programming in 2015, the first year for which data were collected. Thus, about 16 percent of the nation’s spending by orchestras can be attributable to the SLSO. In 2015, metropolitan St. Louis made up about 0.9 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 otherwise suggest.

The SLSO is among those 98.

5

The SLSO is among those 98.

4

analyzed covered the years 2006 through 2014. Therefore, the SLSO’s spending represented a much greater metrics in this regard than the metro area’s share of the nation’s population or personal income. These 267 “free community/educational programs” attracted a total audience of 45,960, or almost 180 per program. This was notably higher than the national average of 170 per education and community engagement performance.

League of American Orchestras Data Not Surveyed for SLSO

While this study for the SLSO in 2019/2020 focuses somewhat narrowly on the SLSO’s economic and community impact, it is valuable to highlight other key findings of the 2016 study published by the League of American Orchestras. This information suggests challenges and opportunities for the orchestra industry that might also have relevance for St. Louis.

For instance, two out of every three orchestras operated with annual expense budgets of less than $300,000 in 2014. The SLSO has expenses averaging roughly $30 million each year, making it one of the largest orchestras in the U.S. in terms of budget. Indeed, the League study found that only two percent of America’s symphony orchestras (approximately 26 orchestras) had budgets exceeding $20 million in 2014. This two percent of all orchestras, however, accounted for one-fifth of all performances, events, and other activities in 2014.

As noted, orchestras across the U.S. produced 28,000 performances, activities, and other events in 2014, attracting a total audience of nearly 25 million, according to the League study. Overall, “audiences declined by 10.5 percent between 2010 and 2014” broadly in line with other performing arts sectors. This decline was sharpest within tour audiences, which decreased by almost 50 percent over the five-year period. In contrast, audiences for classical series concerts declined by 5.5 percent, corresponding roughly to a 3 percent decline in the number of classical series performances offered.1

1 Orchestra Facts 2006-2014: A Study of Orchestra Finances and Operations, commissioned by the League of American Orchestras; November 2016. No subsequent study has been conducted.

2 SLSO increased its nominal (i.e. not inflation-adjusted) spending to $28.9 million during the year 2019, though this was down from a peak of $31.5 million in 2017. No comparable data for the nation as a whole, however, are presently available.

3 The SLSO is among those 98.

4 In 2015, the SLSO spent $28.9 million to operate the symphony and its programming, a decrease from a peak of $31.5 million in 2017. No comparable data for the nation as a whole, however, are presently available.

5 The SLSO is among those 98.

6 While difficult to directly compare the data, the SLSO reports that its “classical series” audiences declined by 13.8 percent between 2016 and 2019 while audiences for its “concert programs” (excluding community and educational programs) declined by only 3.6 percent. While this represents a notable loss in concert patronage, audiences increased from 2016 through 2018 for the Live and Powell Hall series and for the Pulitzer series.

Profile: Frankie Skinner: SLSO Super Fan

At the age of 66, Frankie Skinner attended his first classical music concert at Washington University, performed by five St. Louis Symphony Orchestra musicians, as part of a class assignment while studying at Southwestern Illinois College. Little did he know when given this assignment, that it would turn into a love affair with classical music and specifically the SLSO. “I love classical music. I didn’t think I would ever love it the way I love it now. Sometimes I come here by myself and sit back and close my eyes and listen to the story.”

Since that serendipitous first concert, he has developed an unquenchable passion for the SLSO’s soul-stirring music, attending concerts regularly. Fascinated with the talent of SLSO musicians, he recalled thinking, “I love it when someone puts their heart into what they do.”

The performance at Washington University where Skinner fell in love with classical music was part of the SLSO’s Symphony in Your College program, which brings chamber concerts to partner college and university venues free of cost.

Source: slsostories.org
Across League member orchestras, 40 percent of total income in 2014 was classified as earned income, 43 percent as contributed income, and 17 percent as investment income. The SLSO has a more evenly balanced income portfolio, with 277 percent coming from earned income, 28 percent from contributed income, and 35.6 percent from investment income (as of December 31, 2019). Three-quarters of all earned income for League member orchestras in 2014 was generated from performance and performance-related activities.

The year 2013 was a moment of transition in ticket buying: as single-ticket revenues and group sales exceeded subscription revenues for the first time. The subscription model remained important to audiences as well as to orchestras themselves: nearly 1.4 million people subscribed in 2014. Importantly, the League authors noted an 18 percent increase in the number of people subscribed in 2014. Indeed, the number of ticket buyers per subscriber decreased. Individual (trustee and non-trustee) donors were found to be the cornerstone of orchestras' contributed income, giving almost half of the field’s contributed funds in 2014. The broad base of community support for—and appreciation of—the orchestra’s work is demonstrated by the large number of small gifts made by individuals. In 2014, around 75 percent of the gifts made by non-trustee individuals were less than $250.

Investment income fluctuated in line with macroeconomic trends, dipping significantly during the recession’s trough in 2009 and again during the 2012 downturn, but recovering by 2014. Income draw from the endowment currently covers one-third of the SLSO’s budget.

In 2014, larger-budget orchestras met a greater percentage of their annual operating expenses from endowment earnings than did smaller-budget orchestras. Artistic pay and benefits were by far the greatest expenses incurred by orchestras in 2014, accounting for more than 60 percent—nearly half—of the average budget, a higher proportion than any other arts and cultural sector. Eleven percent of expenses were dedicated to orchestra administrators’ pay and benefits.

Cutting the data another way, orchestras’ concert production expenses accounted for more than two-thirds—69 percent—of all orchestra expenditures in 2014.

Data provided by the SLSO for this economic and community impact study indicate that payroll and benefits for all employees—artistic and administrative—made up an average of 66.9 percent of all expenditures between 2016 and 2019. Non-labor operational expenses averaged 30.7 percent and capital expenses averaged 2.4 percent.

Comparing St. Louis Socio-Economics to Other Major Orchestra Cities

There are generally accepted to be 16 “top” orchestras in the United States, including St. Louis, listed here in order of their original creation date by metropolitan area.

- New York Philharmonic (1842)
- St. Louis Symphony Orchestra (1880)
- Boston Symphony Orchestra (1881)
- Chicago Symphony Orchestra (1891)
- Pittsburgh Symphony Orchestra (1895)
- Cincinnati Symphony Orchestra (1895)
- Philadelphia Orchestra (1900)
- Dallas Symphony Orchestra (1900)
- Minnesota Orchestra (Minneapolis) (1902)
- San Francisco Symphony (1911)
- Houston Symphony (1913 and 1930)
- Baltimore Symphony Orchestra (1916)
- Cleveland Orchestra (1918)
- Los Angeles Philharmonic (1919)
- National Symphony (Washington) (1931)
- Atlanta Symphony Orchestra (1945)

The New York Philharmonic was founded much earlier than St. Louis in 1842, but Boston followed St. Louis in 1881, and next was Chicago in 1891. The youngest is the Atlanta Symphony Orchestra founded in 1945.

This section of the report compares a few socio-economic characteristics of these 16 metropolitan areas and how St. Louis stacks up as a region to continue to support the SLSO as one of the leading orchestras in the United States.

Population by Metropolitan Area

As of mid-2018, metropolitan St. Louis had 2.81 million residents and was the 20th most populated metro area in the United States. Metropolitan St. Louis, like all metro areas, is defined by counties and the largest determinant for becoming a metropolitan county is economics. Contiguous counties with close economic relationships tend to be grouped into metro areas, though some metro areas share boundaries with others (e.g., Chicago and New York). St. Louis is a “stand-alone” metro area made up of eight counties in Illinois plus six counties and the city of St. Louis in Missouri. About three-quarters of that population resides on the Missouri side.

Population of Selected Metro Areas 2018

<table>
<thead>
<tr>
<th>Source: U.S. Census Bureau (millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlanta: 5.95</td>
</tr>
<tr>
<td>Baltimore: 2.8</td>
</tr>
<tr>
<td>Boston: 4.84</td>
</tr>
<tr>
<td>Chicago: 9.5</td>
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<td>St. Louis: 2.81</td>
</tr>
<tr>
<td>San Francisco: 4.73</td>
</tr>
<tr>
<td>Washington: 6.26</td>
</tr>
</tbody>
</table>

There are 381 formally defined metropolitan areas in the U.S. The largest is New York with almost 20 million residents, followed by Los Angeles and Chicago. The smallest is Carson City, Nevada, with just less than 60,000 residents.

Among just the 16 symphony cities noted above, metro St. Louis ranked 12th in 2018, though Baltimore had almost the same population. But Baltimore’s population increased 34 percent between 1970 and 2018 while St. Louis grew at one-third that rate—11 percent. The chart on page 13 compares St. Louis’ 1970 to 2018 growth to the average of the other 15 metros. While St. Louis added 11 percent more residents, the others averaged 47 percent growth.

6 Based on conversations with representatives of the SLSO. Dates were found on Wikipedia.org. What was to become the Houston Symphony is listed as originally founded in 1930 but it disbanded shortly thereafter and was re-formed in 1930.
St. Louis has been a sluggishly growing metro area for several decades, along with notable peers like Pittsburgh and Philadelphia. Still, the St. Louis Symphony Orchestra is the second oldest of the 16, having been founded in 1880 when St. Louis was the fourth largest city in the U.S.

At 2.81 million residents, metro St. Louis comprises about 0.9 percent of the American population. As noted earlier, however, the SLSO produces well over one percent of the nation's audiences. San Francisco's PCI of over $100,000 was almost three times (170 percent) higher than St. Louis in 1970 but jumped to 1.78 times higher in 2018. In contrast, Atlanta's PCI was 93 percent of St. Louis' PCI in 1970 but changed very little to 94 percent of St. Louis in 2018.

Moreover, while Atlanta's per capita income in 2018 was less than in St. Louis (six percent lower), Atlanta's PCI was 1.78 times higher in 2018, its GDP was 3.27 times higher than St. Louis. And San Francisco's GDP per capita was 5.50 times higher than St. Louis.

In many ways, therefore, macroeconomic measures of the metropolitan areas that host the best and most well-known symphony orchestras in the United States broadly indicate that St. Louis is relatively struggling. It's not that St. Louis isn't a large metropolitan economy; it's that the growth pace of change in the St. Louis economy is clearly trailing other large metropolitan areas. This likely puts increasing pressure on fundraising and both public and private support for maintaining a world-class orchestra, not to mention resource pressures on countless other arts organizations and assorted non-profits.

Per Capita Income by Metropolitan Area

While per capita income (PCI) can be a misleading metric at the metropolitan level because of notable differences in cost-of-living by U.S. region, it is nevertheless a useful indicator of relative conditions. As shown on the chart below, St. Louis ranked 13th among the 16 symphony cities for PCI in 2018.

Per Capita Income in Selected Metro Areas 2018 Source: U.S. Bureau of Economic Analysis (2019 Dollars)

Gross Domestic Product by Metro Area

Contrasts in gross domestic product (GDP) at the metropolitan level seem to be even more unbalanced, as shown to the right. Again, St. Louis ranked 13th of the 16 symphony cities in 2018, ahead of Pittsburgh, Cincinnati, and Cleveland. Particularly notable is the comparison between St. Louis and San Francisco. While San Francisco's per capita income was 178 times higher than St. Louis in 2018, its GDP was 3.27 times higher than St. Louis. And San Francisco's GDP per capita was 5.50 times higher than St. Louis.

Gross domestic product in the St. Louis metropolitan area increased 15 percent between 2001 (earliest metropolitan GDP data available) and 2018. This ranked 15th in growth rate among the 16 symphony cities. Pittsburgh increased 31 percent, double the rate of growth in greater St. Louis. Only Cleveland grew more slowly at 13 percent while San Francisco grew 61 percent.

Moreover, while Atlanta’s per capita income in 2018 was less than in St. Louis (six percent lower), Atlanta’s metropolitan GDP was 2.35 times larger than St. Louis and its GDP per capita was 1.87 times higher.

In many ways, the PCI data are indicative of shifts in the uneven distribution of income throughout the U.S. But they are also indicative of the amount of cash that is available for making purchases in a metropolitan economy. San Francisco has a lot more cash per person than St. Louis (or most every other metro area) but it is also a higher cost-of-
But the same projections show robust potential growth of 18 percent in St. Louis for the “performing arts, spectator sports, and related” sector. Most of this growth might be in “sports and related” but there is no way to disaggregate this regional data any further.

At the national level, however, the projections appear grim for “performing arts companies,” of which the St. Louis Symphony Orchestra is one. U.S. projections show this sector’s jobs declining by over four percent from 2018 to 2028. More optimistically, Missouri’s economists show a slight job increase in the state for this sector of just under one percent over ten years. Again, there are no projections for this sector in the St. Louis region.

Far more robustly, the sector called “promoters of events, and agents and managers” shows an 11 percent national job growth rate over the coming decade. Missouri projects twice this rate of growth. Again, this might include events, agents, and managers in non-performing arts sectors, but it seems clear that there should be more “promotion” going on, suggesting more events over time, though perhaps with fewer workers within the actual events sectors.

Of course, these projections are all based on recent trends and on variables that seem to affect, or are affected by, the economic sectors in question. That is, there are a great many assumptions built into the projections. A purpose of the projections, therefore, is for advocates of such sectors to attempt to alter the course of the trends toward more favorable outcomes. Projections, themselves, aren’t destiny. Still, given sluggish economic forces in St. Louis (as illustrated in the previous section) and mixed messages about job projections in the nation, state, and greater St. Louis, there is much to be done to assure a stronger and economically healthier climate in St. Louis that supports the arts and, more specifically, the SLSO.

After the U.S. projections are released, the states produce their own projections, but these are typically one year behind because of time necessary to coordinate with the national numbers. Latest available projections for Missouri and large subsections of the state, therefore, are for the period 2016 to 2026. The graph below, however, is based on an extrapolation of trend data for the state and the St. Louis area to estimate what the projections might be for 2018 to 2029 to better match the U.S. numbers. The extrapolations are solely the responsibility of this report’s authors.

### Arts & Related Economic Sectors Employment Projections 2018-2028

**USA, Missouri & Metro St. Louis**  
*Source: U.S. Dept. of Labor & MO Dept. of Economic Development*

<table>
<thead>
<tr>
<th>Sector</th>
<th>USA 2018-2028</th>
<th>Missouri 2016-2026</th>
<th>St. Louis 2016-2026</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts, Entertainment &amp; Recreation</td>
<td>6.6%</td>
<td>7.2%</td>
<td>18%</td>
</tr>
<tr>
<td>Performing Arts, Spectator Sports &amp; Related</td>
<td>4.6%</td>
<td>16.6%</td>
<td>-9.8%</td>
</tr>
<tr>
<td>Performing Arts Companies</td>
<td>11.4%</td>
<td>23.3%</td>
<td></td>
</tr>
<tr>
<td>Promoters of Events, Agents &amp; Managers</td>
<td>0.7%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

While symphony orchestras do not constitute a projected sector, four larger sectors might serve as proxies. As shown above, the U.S. expects to experience a 6.6 percent increase in “arts, entertainment, and recreation” jobs between 2018 and 2028. Missouri projects a slightly faster rate of growth at 7.2 percent for the state, but state economists project a decline in this sector for the St. Louis region of some 9.8 percent. This would be a decline of about 1,880 jobs in the St. Louis area.

For more robustly, the sector called “promoters of events, and agents and managers” shows an 11 percent national job growth rate over the coming decade. Missouri projects twice this rate of growth. Again, this might include events, agents, and managers in non-performing arts sectors, but it seems clear that there should be more “promotion” going on, suggesting more events over time, though perhaps with fewer workers within the actual events sectors.

### Arts & Related Economic Sectors Employment Projections 2018-2028

**USA, Missouri & Metro St. Louis**  
*Source: U.S. Dept. of Labor & MO Dept. of Economic Development*

For purposes of regional projections within Missouri, the St. Louis Region is defined as the City of St. Louis plus St. Louis, Jefferson, Franklin, and St. Charles Counties. This is a smaller area than the formal metropolitan definition (excludes Lincoln and Warren Counties and all of the Metro East counties in Illinois).
The St. Louis Symphony Orchestra hosted an annual average of 340 events over the fiscal years from 2016 through 2019, as illustrated below. But note also that there was an intentional and strategic reduction in the number of events into 2018 to accommodate market changes, with some resulting regrowth in 2019. The SLSO divides its variety of events into three categories: concert programs, free community/education programs, and other programs. The latter category includes road tours (though these might also be concerts) and special events held at Powell Hall.

### Numbers and Types of SLSO Events

#### SLSO Concert Programs

<table>
<thead>
<tr>
<th>Year</th>
<th>Family Concerts</th>
<th>Pulitzer Series</th>
<th>Live at Powell Hall</th>
<th>Holiday Concerts</th>
<th>Education Concerts</th>
<th>Classical Series</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY16</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>15</td>
</tr>
<tr>
<td>FY17</td>
<td>5</td>
<td>27</td>
<td>6</td>
<td>13</td>
<td>6</td>
<td>4</td>
<td>46</td>
</tr>
<tr>
<td>FY18</td>
<td>3</td>
<td>14</td>
<td>8</td>
<td>18</td>
<td>14</td>
<td>11</td>
<td>49</td>
</tr>
<tr>
<td>FY19</td>
<td>4</td>
<td>14</td>
<td>8</td>
<td>18</td>
<td>16</td>
<td>5</td>
<td>48</td>
</tr>
<tr>
<td>Avg</td>
<td>4</td>
<td>21</td>
<td>6</td>
<td>15</td>
<td>11</td>
<td>4</td>
<td>47</td>
</tr>
</tbody>
</table>

#### SLSO Other (Mostly Out-of-Town Programs)

<table>
<thead>
<tr>
<th>Year</th>
<th>Family Concerts</th>
<th>Holiday Concerts</th>
<th>Live at Powell Hall</th>
<th>Education Concerts</th>
<th>Classical Series</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY16</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>FY17</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>FY18</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>FY19</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Avg</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

#### SLSO Free Community/Education Programs

<table>
<thead>
<tr>
<th>Year</th>
<th>Youth Orchestra</th>
<th>Education Programs</th>
<th>Community Programs</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY16</td>
<td>6</td>
<td>10</td>
<td>21</td>
<td>37</td>
</tr>
<tr>
<td>FY17</td>
<td>11</td>
<td>12</td>
<td>27</td>
<td>50</td>
</tr>
<tr>
<td>FY18</td>
<td>12</td>
<td>11</td>
<td>20</td>
<td>43</td>
</tr>
<tr>
<td>FY19</td>
<td>14</td>
<td>20</td>
<td>21</td>
<td>55</td>
</tr>
<tr>
<td>Avg</td>
<td>11</td>
<td>14</td>
<td>21</td>
<td>46</td>
</tr>
</tbody>
</table>

#### SLSO Concert Patrons, 2016-2019

- **SLSO Concert Patrons, 2016-2019**
  - **FY2016:** 381
  - **FY2017:** 348
  - **FY2018:** 310
  - **FY2019:** 522
  - **Average:** 440

There are many subcategories as well. Concert programs are measured in six subcategories, as shown below. The Classical Series is probably what the SLSO is most known for with major programs held at Powell Hall. Over the four years of study, there has been an average of 58 Classical Series programs, or almost half (48.9 percent) of all concert programs.

The SLSO made a strategic shift in the total number of programs it offered after 2016 in order to adjust resources to better meet the organization’s goals and the needs of the community. An immediate impact was a decline in community/education programs, but an eventual increase in programs that had the best impact.

The “other” events category is small and has remained rather steady at about eight programs per year. In 2016, this category included concerts in Cape Girardeau and Columbia, Missouri, and concerts in four cities in California.

In 2017, there were “other” concerts in Columbia and Rolla, Missouri, as well as in Urbana, Illinois. These were accompanied by a several-city concert tour in Spain. In 2018, there were a few regional concerts by the SLSO and another tour in California. Data for 2019 do not show these various tours but include major events at Powell Hall, including “Live from Here,” an entertainment program on National Public Radio, and the St. Louis Speaker Series in conjunction with Maryville University and other local sponsors.

Still, even the lower number would have been an improvement from both FY17 and FY18 when attendance dipped by several thousand after some 262,500 audience members in FY16.

Concert programs are the biggest patronage generators of the SLSO’s many kinds of events. Concerts drew an average of 202,800 people between 2016 and 2019, just over three quarters (77.3 percent) of all patrons. Of the Concert attendance, the Classical Series is responsible for almost half, averaging 98,100 for the past four years. The Live at Powell Hall series attracted an annual average 59,000 audience members, or 291 percent of all Concert participants.
Community programs lost about 6,000 audience members between 2016 and 2019 as a result of intentional reduction in the number of free chamber concerts in the community to bring a larger audience for live symphonic performances at Powell Hall, but education programs experienced a substantial jump in attendance in 2019 to more than 6,000, up from just 1,915 in 2018 despite a slight readjustment to the number of programs delivered to schools.12

In sum, SLSO-sponsored events attracted 5.5 percent more audience members in 2019 than in 2016, but an 8.6 percent increase over 2017 when overall attendance dropped by 2.9 percent after 2016.13

Where SLSO Patrons Come From

SLSO data shows that patrons for its FY19 events came from all but one of the 50 states (Delaware is absent) plus the District of Columbia and internationally, though specific countries are not known. Still, almost nine out of ten patrons live in the bi-state St. Louis metropolitan area. It is clearly the St. Louis Symphony Orchestra.

More than three-quarters of all patrons live on the Missouri side of the metro area and almost 12 percent live in the Metro East. Of the metro area alone, almost 87 percent of patrons come from the west side and 13 percent from the east side. This is disproportionate to the general population distribution of the metro area where the east side has one-quarter of the residents.

Moreover, the SLSO is a Missouri symphony orchestra. In 2019, more than eight out of ten patrons live in Missouri, which includes counties and cities not necessarily located in the metropolitan area.14

Share of SLSO Patrons Who are Residents of Missouri

<table>
<thead>
<tr>
<th>Share</th>
<th>Missouri</th>
<th>Out of State</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Missouri</td>
<td>81.2%</td>
<td>18.8%</td>
</tr>
</tbody>
</table>

While Missouri is home to 81.2 percent of patrons, Illinois is home to 14.7 percent, including locations not in Metro East. The rest of the country and world provide less than five percent of all SLSO patrons. In third place is “International” with 0.54 percent of patrons, followed by California with 0.31 percent.

The distribution pattern of ticket buyers in the bi-state area shows there is a huge concentration in the metro area. But other metro areas in Missouri and Illinois also provide a fair number of patrons: Chicago, both Springfields, Peoria, Columbia, and Kansas City. Perhaps these represent opportunities for targeted marketing to attract more out-of-towners to SLSO events which, in turn, will increase the economic impact of the SLSO because the out-of-towners bring “new money” into the region.

This metropolitan area pattern is also apparent from the distribution of patrons from around the country. While they do not represent a huge percentage of patrons overall, it’s clear to see that major metro areas like Los Angeles, San Francisco, Seattle, New York, Boston, Washington, Atlanta, and much of Florida could be targeted as important markets.

The final map in this series illustrates the distribution of ticket buyers in the metropolitan area. It demonstrates the uneven pattern between Metro West and Metro East. Note that most of the patronage comes from what are commonly considered wealthier communities of the metro area. These include the central corridor of the city of St. Louis, much of central and west St. Louis County, and the more affluent suburbs in Illinois such as Edwardsville, Collinsville, and O’Fallon.
Focus on Youth Participation in SLSO Events

The St. Louis Symphony Orchestra served almost 74,000 youths during fiscal year 2019, up more than 20 percent since 2016, as shown below. Just under two-thirds (64.9 percent) of these youth attended SLSO concerts while the rest participated in community and education programs.

All SLSO Youths Served, 2016-2019

<table>
<thead>
<tr>
<th>Year</th>
<th>Youths Served</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>3,1K</td>
</tr>
<tr>
<td>2017</td>
<td>3K</td>
</tr>
<tr>
<td>2018</td>
<td>4.8K</td>
</tr>
<tr>
<td>2019</td>
<td>6.9K</td>
</tr>
</tbody>
</table>

Education concerts are the leading attractor of youths to SLSO events. In FY19, 18,675 youths participated in education concerts (38.9 percent of all concert youth attendees), but this number was down from the previous three years. The average for the four fiscal years was almost 20,000, or nearly half (48.7 percent) of the four-year average attendance by youth at concerts. In FY19, the SLSO offered an opportunity for students to attend Coffee Concerts, which may have transferred some youth interest away from the education concerts. But the net increase was greater than the decline in education concert participation.

Live at Powell Hall events are also highly favored by youths, attracting almost 12,900 in 2019, or an average of 9,600 over the four years shown.

Within the community/education programs category, the Picture the Music and Express the Music programs (PTM/ETM) are the most popular, by far, with youth. These art and writing activities, while not performance-based programs, connect students with classical music and are indicative of the power of teaching and learning music in attracting the interest of students. An average of 14,900 youths participated in these events over the four years, or two out of three youths (66.5 percent) participating in community/education programs.

Profile: St. Louis Symphony Youth Orchestra

Founded in 1970 by Conductor Laureate Leonard Slatkin, today’s St. Louis Symphony Youth Orchestra (YO) includes about 100 accomplished young musicians, ages 12 to 22, from more than three dozen schools and 46 ZIP codes in greater St. Louis. Throughout its history, the YO has provided a destination orchestral training ground, drawing you musicians from a 150-mile radius of Powell Hall. One of only a few American YOs directly associated with a major orchestra, the YO’s specialized curriculum focuses on connection, training, and mentorship with the musicians of the SLSO in an authentic symphony orchestra setting.

YO members commit to an intensive nine-month schedule of weekly, three-hour rehearsals; receive bi-monthly coaching with SLSO musicians; participate in a side-by-side rehearsal with the SLSO; engage in masterclasses with internationally renowned musicians; and present three public concerts at Powell Hall that attract more than 8,000 patrons annually.

YO members are selected through a blind audition process. They sign contracts like professional musicians, emphasizing the importance of their commitment to the program, their practice, and their peer musicians. Even their concerts, performed on stage at historic Powell Hall, underscore this authentic orchestral experience.
The reach of the SLSO is geographically broad in the bi-state area. As shown on these maps, schools that participate in SLSO education events come from as far away as Peoria, Danville, and Carbondale, Illinois; and from Hannibal, Springfield, and Poplar Bluff in Missouri, as well as from the metropolitan region.

MO & IL Schools that participated in SLSO Education Events

Profile: Sensory-Friendly Concerts

Individuals with disabilities typically have fewer opportunities to engage with the arts than their peers. As one of many efforts to bring classical music to all audiences, the SLSO recently resurrected a sensory-friendly concert series that began in the 1980s and lasted through the 90s. The SLSO partnered with the St. Louis Jewish Community Center and Special School District of St. Louis County to create inclusive music experiences for individuals with a range of special needs.

An ensemble of SLSO musicians, Emmy Award-winning Bobby Norfolk as narrator, and an American Sign Language interpreter brought the timeless classic Peter and the Wolf to life for the audience on their own terms, in a judgement-free environment. Greg Heaney, a music educator at Southview School in Crestwood, said the concert had an instant impact on his students. More than 100 students attended, many of them hearing a SLSO concert for the first time. With a palpable sense of wonder in the room, students clapped along, eyes glowing and smiles beaming.

Source: slsostories.org

Average Number of Patrons Per SLSO Event

Altogether, the SLSO has been able to increase its average audience size over the four fiscal years under study. The average grew almost 25 percent from 689 per event in 2016 to 860 in 2019.

Average Audience Size for All SLSO Programs, 2016-2019

<table>
<thead>
<tr>
<th>Year</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2016</td>
<td>689</td>
</tr>
<tr>
<td>FY2017</td>
<td>732</td>
</tr>
<tr>
<td>FY2018</td>
<td>825</td>
</tr>
<tr>
<td>FY2019</td>
<td>860</td>
</tr>
</tbody>
</table>

These averages vary widely and, as such, may not be very helpful on an individual event basis. For instance, the average attendance at the Forest Park concert in 2019 was 20,000. That’s because 20,000 people attended the single Forest Park event that year.

But it is important to highlight some of the trend averages for the various concert categories. The heights of the bars indicate that average attendance at concert events has been declining. The overall average attendance at the 116 concerts in 2016 was 1790. This dropped to 1627 for the 118 concerts in 2019.

St. Louis Region Schools that participated in SLSO Education Events

A conclusion seems to be that a more diversified outreach strategy is helping to increase awareness of and participation in SLSO events. But it is also clear that some of these “outside of Powell Hall” events might be cannibalizing on “inside of Powell Hall” events. The non-symphonic community programs appear to enhance the branding and awareness of the SLSO in the community even though there were 41 fewer SLSO events in 2019 than in 2016 (down 10.7 percent). In fact, overall patronage increased 5.6 percent and average attendance, therefore, increased by 24.8 percent.

On the other hand, community/education events helped to increase overall average attendance. The Forest Park concert, for example, is the single largest event for the SLSO and its average attendance increased 154 percent between 2016 and 2019.

Education programs have also done very well on an average basis. While attracting only 85 patrons per event in 2019, this was a 629 percent increase over an average of just 12 patrons per education program in 2016.

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Patrons enjoy the SLSO’s annual Forest Park concert during a beautiful sunset.
Flow of Economic Impacts

Multiplier Effects: How They Work

When a person or an organization spends money, that money immediately becomes income for someone else. The recipients of that income are then free to spend their money, and that spending becomes income for others. When this spending and re-spending process is confined to a fixed geographic area (such as the St. Louis metro area), the amount that is spent during each round of re-spending declines within that geography.

That is because some of the spending by individuals and organizations inevitably “leaks” from the geographic area. For instance, the SLSO might buy goods or services from another state or even another country. Employees of the SLSO spend some of their money on vacations out of the St. Louis area.

Eventually, all of the initial spending disappears from the subject geographic area, though the specific timing of that leakage depends on many factors, not least of which is how much there is to buy within the geographic area and how strong the economy is to encourage interior spending, or discourage it.

As depicted below, the operation of the SLSO in, say, the metro area triggers a “direct” round of spending (left side of diagram) by the SLSO for employees, capital improvements, non-labor operations, and even taxes, though taxes were not a subject of the survey for this report since the SLSO, itself, is essentially tax-exempt. This direct spending generates a first round of multiplier effects (middle of the diagram) and further rounds of multiplier effects (right side).

Because the St. Louis region is a fixed geographic area and there are “leakages” of spending during each round of re-spending, it is possible to estimate regional multiplier effects that are initiated by an annual spending routine of the SLSO.

The federal government’s extensive database of economic information is the source of “multiplier co-efficients” applicable in each county of the United States or for groups of contiguous counties such as states or metropolitan areas. This database, known as the Regional Input-Output Multiplier System (RIMS), is managed and routinely updated by the U.S. Bureau of Economic Analysis (www.BEA.gov) within the U.S. Department of Commerce. Multiplier coefficients are available for a wide range of economic sectors. These multipliers essentially demonstrate how big an impact that spending within one sector (in this case, the performing arts, spectator sports, museums, and related activities sector) benefits the rest of the metropolitan economy and a host of other sectors within the metro area.

For instance, spending in the performing arts sector also benefits the professional services sector and various retail and dining sectors, both within greater St. Louis and elsewhere. RIMS provides multipliers based on ever-changing and ever-growing economic data provided to BEA through many sources. All that data is coded by county, so BEA is able to determine the economic links between various industry sectors within counties.

For the current study, multipliers were obtained for the 15-county St. Louis metropolitan area and for the state of Missouri, details of which are presented in the next section of the report. The multipliers help to estimate indirect and induced economic impacts. As detailed later, for instance, the $37 million in average annual collective spending by the SLSO and its patrons triggers another $60 million in economic activity within the metro area, for an overall net multiplier of 1.62.

Profile: Mother & Son Violin Virtuosos

Originally from England, Angie Smart has been a First Violinist with the St. Louis Symphony Orchestra since 1998. Her son, Theo Backhorst, has followed in her footsteps and is quickly on his way to becoming a violin virtuoso. Inspired by his mother, Theo has been playing the violin since he was four and became a member of the St. Louis Symphony Youth Orchestra in 8th grade. Theo served as a co-concertmaster for the Youth Orchestra.

Smart has been inspired by the SLSO from an early age, when she bought her first CD of the orchestra’s recordings as a gift for her father. Calling St. Louis home now for more than 20 years, she continues to be amazed at the city’s arts scene. “There’s simply an unbelievable amount of music happening in St. Louis… there is everything here—in the art scene, in terms of education, in terms of food, in terms of culture,” she raved. The city’s music community and the SLSO’s position as a nationally renowned institution have created a supportive environment for hers and Theo’s development as professional violinists.

Source: thestl.com/culture/family-matters/
Multiplier Effects in St. Louis and Missouri

Economic Impacts in Metropolitan St. Louis

The St. Louis Symphony Orchestra spent about $31,401,000 in an average year between 2015 and 2019. These expenditures are the sum of the “Direct Spending” line of columns 1, 2, and 3 on Table 1. These expenditures are the sum of the “Direct Spending” line of columns 1, 2, and 3 on Table 1.

- $75,000 went toward capital expenditures (2.0 percent of all annual spending).
- $966,000 paid for non-labor operations (25.9 percent).
- $2,000,000 paid employees for wages, salaries, and benefits (64.4 percent).

Table 1: Annual Economic Impact of the SLSO in the St. Louis Region (2015-2019 Annual Averages in 2019 Dollars)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Spending</td>
<td>$751,000</td>
<td>$9,050,000</td>
<td>$21,000,000</td>
<td>$4,826,000</td>
<td>$36,633,000</td>
</tr>
<tr>
<td>Annual Average Number of Patrons</td>
<td>253,596</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multipliers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Output</td>
<td>211</td>
<td>212</td>
<td>1.27</td>
<td>2.05</td>
<td>2.26</td>
</tr>
<tr>
<td>Earnings</td>
<td>0.68</td>
<td>0.83</td>
<td>0.38</td>
<td>0.63</td>
<td>0.78</td>
</tr>
<tr>
<td>Employment</td>
<td>12.87</td>
<td>23.83</td>
<td>9.15</td>
<td>20.95</td>
<td>24.14</td>
</tr>
<tr>
<td>Added Economic Impact in Missouri</td>
<td>$1,585,000</td>
<td>$20,458,000</td>
<td>$26,609,000</td>
<td>$9,870,000</td>
<td>$36,633,000</td>
</tr>
<tr>
<td>Output</td>
<td>$51,000</td>
<td>$8,022,000</td>
<td>$8,083,000</td>
<td>$3,063,000</td>
<td>$916,000</td>
</tr>
<tr>
<td>Earnings</td>
<td>$40,997,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Indirect Jobs Held by Missouri Residents</td>
<td>10</td>
<td>230</td>
<td>190</td>
<td>100</td>
<td>10</td>
</tr>
<tr>
<td>Total Economic Impact in Missouri</td>
<td>$2,336,000</td>
<td>$30,108,000</td>
<td>$47,609,000</td>
<td>$14,696,000</td>
<td>$96,071,000</td>
</tr>
<tr>
<td>Earnings</td>
<td>$40,997,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Jobs at SLSO in Missouri area</td>
<td>472</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Direct Jobs in Missouri Plus Indirect Jobs Held by Missouri</td>
<td>1,012</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Annual Earnings per Direct SLSO Job</td>
<td>$44,500</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Annual Earnings per Indirect Multiplier Job</td>
<td>$37,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Multiplier Definitions

- Output: Total dollar change in the St. Louis metro area economy due to expenditures by the St. Louis Symphony Orchestra.
- Earnings: Total dollar change in earnings of households in metropolitan St. Louis due to expenditures by the St. Louis Symphony Orchestra.
- Employment: Total change in the number of jobs held by metropolitan St. Louis residents per $1,000,000 of added output.

This section of the report describes in some detail how to read and interpret Table 1, which addresses impacts in metropolitan St. Louis. The next section addresses impacts in the entire state of Missouri. It is not as detailed because the processes and calculations were conducted in the same manner as Table 1.

Returning to Table 1: SLSO patrons in metro St. Louis spent $14,826,000 in an average year for non-transportation goods and services that can be attributed to their SLSO experience (column 4). This “direct spending” is in addition to that of the SLSO itself. Such expenditures include dining in restaurants before or after SLSO events, shopping for retail goods and services that would not have been purchased because the economic impacts of such purposes are captured by the spending by the SLSO itself.

SLSO patrons also spent $406,000 per year for transportation purposes that can be attributed to their patronage of SLSO events (column 5).

Column 6 shows that an average year results in total direct spending of the sum of the first five columns, or $36,633,000 (or $36.6 million). These are the numbers that trigger multiplier, or respending, effects throughout the metropolitan area economy attributable to the SLSO.

The second data line of Table 1 shows the number of SLSO patrons in an average year: 253,596. Not shown is the average annual spending per patron: $123.82 per patron for expenditures by the SLSO plus $20.63 per patron for spending attributable to their participation in SLSO events.

The next set of numbers are the multipliers obtained from the federal government for economic sectors relating to the particular spending categories. The “Goods and Services” spending in column 2, for instance, relies on multipliers for the performing arts, spectator sports, museums, and related activities sector. There is no finer-grained sector for symphony orchestras primarily because of the limitations of the economic data. In other words, the spending by the SLSO for non-labor operations (which is titled here “goods and services”) is multiplied in the St. Louis metro economy through the performing arts, spectator sports, museums, and related activities sector.

Multipliers for capital improvement spending (Column 1), on another hand, are best obtained from the construction sector of the economy. Again, there is no finer-grained capital improvements sector for orchestras, or even for the broader category of performing arts, spectator sports, museums, and related activities because of national data limitations. Moreover, most capital improvement spending is for construction kinds of projects, so money spent on construction is best measured through the construction multipliers.

Similarly, the multipliers that best depict how employees will spend their money (Column 4) in the Missouri economy are from the households sector. While the SLSO pays its employees, the multiplier models consider that it is the employees who determine where and how much of their wages are spent, not the SLSO itself.

Thus, the direct spending by the SLSO to support its mission is best tracked through the three direct sectors of the metro area’s economy: performing arts, spectator sports, museums, and related activities; construction; and households.
The eighth spending category, local transportation as shown in Column 5 of Table 1, was matched with two multiplier sectors:

<table>
<thead>
<tr>
<th>Spending Category</th>
<th>Multiplier Sector</th>
<th>Weighting Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local transportation</td>
<td>Transit &amp; ground passenger</td>
<td>50.0%</td>
</tr>
<tr>
<td>Local transportation</td>
<td>Other transportation &amp; support activities</td>
<td>50.0%</td>
</tr>
</tbody>
</table>

Thus, the multiplier coefficients shown on Table 1 in Columns 4 and 5 represent weighted averages of the above multiplier sectors as they apply in metropolitan St. Louis.

Of course, it gets more complicated. There are three multipliers in each spending category: output, household earnings, and employment.

1. The first is the “output” multiplier. It is the overall economic activity multiplier. It is multiplied by the direct spending (sum of Columns 1 to 5 on the first row of numbers) to determine overall indirect spending that the metro area’s economy should expect to be supported by the rounds of re-spending triggered by the initial spending. For example, the annual average of $781,000 in capital improvements is multiplied by 2.11 to determine that the additional impact in metro St. Louis should be $1,585,000, shown on the rows just below the multiplier coefficients.

2. The second multiplier is for added “household earnings.” It, too, is multiplied by the initial direct spending to determine added earnings for Missourians that should result from the initial spending. Under capital improvements, this amounts to $781,000 in spending x 0.68 to result in $511,000 that will end up as household earnings during the re-spending rounds.

3. The third multiplier is for jobs supported because of the multiplier effects. The multiplier is actually “jobs per million dollars in initial spending.” So, the $781,000 in initial capital improvements must first be divided by one million (= 0.000781), then multiplied by 12.57 to determine that the initial-capital improvements spending will help support about 10 additional jobs in the metro St. Louis economy. These jobs may be in a great many sectors. The largest job benefits will be in the construction sector; of course. But spending for construction also requires goods and services (thus, jobs) from several manufacturing sectors, from wholesale trade, and even health services.

After all the multiplication is completed, the benefits of the various forms of initial spending are shown in Column 6 under the subtitle “Added Economic Impact in Missouri.” This shows that additional economic output in the metro area within most or all other sectors would reach $59,438,000 because of the initial annual spending of $36,633,000. This is an overall net multiplier of 1.62. The gross multiplier, therefore, is 2.62, which includes not only the indirect economic activity but also the direct spending by the SLSO and its patrons.22

Of this added economic output, $19,970,000 would become added earnings for households in the metro area and there would be 540 additional jobs supported in the area. Dividing jobs by earnings indicates that the average multiplier job would be paid $37,000 per year, a figure shown further down Table 1.

Adding the direct spending to the multiplier effects yields the section of the table labeled “Total Economic Impact in the St. Louis Metro Area.” With all the spending by the SLSO, by SLSO’s patrons, and the multiplier effects, the SLSO sector triggers almost $981 million in metro-wide economic activity per average year. This activity supports almost $48.0 million in household earnings and 1,072 jobs (the sum of the 472 jobs within the SLSO plus the multiplier jobs).

As shown in Table 1, just below those numbers, the average SLSO worker is paid $44,500 in wages or salaries while the average multiplier job is paid $37,000. The lower amount for multiplier jobs is primarily attributable to multiplier effects in lower paying sectors like retailing and many services.

### Direct & Multiplier Effects SLSO in Metropolitan St. Louis

<table>
<thead>
<tr>
<th>Output</th>
<th>Direct: $36.6M</th>
<th>Multiplier: $59.4M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earnings</td>
<td>Direct: $21M</td>
<td>Multiplier: $20M</td>
</tr>
<tr>
<td>Jobs</td>
<td>Direct: 472</td>
<td>Multiplier: 540</td>
</tr>
</tbody>
</table>

---

22 Americans for the Arts, Arts & Economic Prosperity 5, The Economic Impact of Non-Profit Arts and Cultural Organizations and Their Audiences. National Statistical Report 2016. All dollar amounts from that statistical report have been converted to 2019 dollars for this SLSO report.
Economic Impacts in the State of Missouri

Economic impacts triggered within the entire state of Missouri are shown on Table 2. The methodology to create Table 2 is the same as Table 1, though patron spending is slightly adjusted to reflect different numbers for the state as opposed to the metro area. Using SLSO data, its events attracted 253,056 metro area patrons in an average year between 2015 and 2019. 254,193 patrons from Missouri as a whole. Thus, Metro East patrons are excluded from the Missouri data but patrons from outside of the metro area are included in the state data. Overall, the SLSO generates $37.3 million in direct spending. Of that, $21 million is direct employment, and an additional 560 jobs.

A 2020 analysis indicates total household earnings based on average annual SLSO operations are $39.77 million dollars. Table 3, below, shows how personal income in Missouri relates to actual tax collections by state government. Using the average annual personal income of Missourians for the years 2015 through 2018, and based on annual state tax collections for the same period, the household earnings of personal income becomes individual income taxes. This is not the same as the tax rate. The tax rate in Missouri is higher than 2.68 percent, but not all income is taxed. The figures on Table 3 represent a “gross effect” on all income based on actual collections.

Missouri State Tax Revenues from SLSO Impacts

An estimate of the tax revenue benefits for the state government treasury can be made based on the strong statistical correlation between personal income and individual income taxes, and between individual income taxes and other major tax categories. In this case, the fundamental independent variable is the amount of household earnings (i.e., personal income) that the direct and multiplier impacts generate in the state triggered by the operations of the St. Louis Symphony Orchestra and the spending by the SLSO’s patrons that is attributable to their participation at SLSO events. Table 1 of this report indicates, total household earnings based on average annual SLSO operations are $39.77 million dollars.

Table 3: Average Missouri Taxes Collected, Fiscal Years 2013-2016
Source: Missouri Department of Revenue; U.S. Bureau of Economic Analysis.

<table>
<thead>
<tr>
<th>Tax Type</th>
<th>Average Collection (thousands)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Income Tax</td>
<td>$17,875,000</td>
</tr>
<tr>
<td>Corporate Income Tax</td>
<td>$14,569,000</td>
</tr>
<tr>
<td>Sales &amp; Use Taxes (State)</td>
<td>$3,478,000</td>
</tr>
<tr>
<td>Other Taxes*</td>
<td>$1,568,200</td>
</tr>
<tr>
<td>Sales &amp; Use Taxes (Local)</td>
<td>$3,319,200</td>
</tr>
<tr>
<td>Total Collections</td>
<td>$17,875,000</td>
</tr>
<tr>
<td>State Personal Income</td>
<td>$31,565,000</td>
</tr>
</tbody>
</table>

*Other Taxes include sales and use, corporate income, individual income, and other taxes.

Table 4: Missouri State Taxes From Direct and Multiplier Effects of St. Louis Symphony Orchestra Annual, 2019 dollars
Source: Missouri Department of Revenue; U.S. Bureau of Economic Analysis.

<table>
<thead>
<tr>
<th>Tax Type</th>
<th>Average Collection (thousands)</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
<tr>
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</tr>
<tr>
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</tr>
<tr>
<td>Other Taxes*</td>
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</tr>
<tr>
<td>Sales &amp; Use Taxes (Local)</td>
<td>$3,319,200</td>
</tr>
<tr>
<td>Total Collections</td>
<td>$17,875,000</td>
</tr>
<tr>
<td>State Personal Income</td>
<td>$31,565,000</td>
</tr>
</tbody>
</table>

Thus, Table 4 shows that the household earnings impact of the SLSO in an average year should generate about $71,100 in corporate household earnings. Other major state revenue sources include corporate income and sales taxes. There is a strong correlation between individual income taxes and both of these taxes. Based on that relationship, annual operations of the SLSO should generate about $71,100 in corporate income taxes.
taxes (not from the SLSO itself, which is tax-exempt, but from multiplier effects on tax-paying corporations) and $528,000 in sales taxes for state government. Finally, the statistical correlations continue regarding all other taxes collected by the state and the sum of the individual, corporate, and sales taxes.

**Table 5: Missouri State Taxes from Direct and Multiplier Effects of the St. Louis Symphony Orchestra in the St. Louis Metropolitan Area**

(Annual in 2019 dollars) – Excludes Illinois portion of the metro area

<table>
<thead>
<tr>
<th>Tax Category</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Income Tax</td>
<td>$895,500</td>
<td>2.68% of direct &amp; indirect earnings triggered by the public transit sector</td>
</tr>
<tr>
<td>Corporate Income Tax</td>
<td>$59,600</td>
<td>6.66% of individual income taxes triggered by indirect earnings from public transit</td>
</tr>
<tr>
<td>Sales &amp; Use Taxes (State)</td>
<td>$442,900</td>
<td>49.46% of individual income taxes triggered by public transit’s economic impacts</td>
</tr>
<tr>
<td>Other Taxes’</td>
<td>$184,800</td>
<td>13.93% of these taxes above</td>
</tr>
<tr>
<td>Sales &amp; Use Taxes (Local)</td>
<td>$407,800</td>
<td>45.54% of individual income taxes triggered by public transit’s economic impacts</td>
</tr>
<tr>
<td>Total Collections</td>
<td>$2,000,600</td>
<td>0.08% of total economic impact from the SLSO in the St. Louis metro</td>
</tr>
<tr>
<td>Total Collections: Just State Government</td>
<td>$1,592,800</td>
<td>0.08% of total economic impact from the SLSO in the St. Louis metro</td>
</tr>
</tbody>
</table>

Missouri State Tax Payments Generated from the St. Louis Metropolitan Area

Using the same methodology as explained above, Table 5 indicates that $1,592,800 of the $1,898,800 generated in an average year for state government taxes emanates from the Missouri side of the St. Louis metropolitan area. Table 5 is adjusted to exclude economic and income impacts that benefit the Illinois side of the metro area.

In sum, the average annual operations and audiences of the SLSO in Missouri trigger direct and multiplier impacts that pay almost $1.9 million each year to support state government (2019 dollars). Another $486,000 is generated in local sales taxes reimbursed by the state to cities and counties.

Thus, because the SLSO is located in and primarily serves the St. Louis area, its economic and fiscal impacts are generally largest with that area. The seven counties of the metropolitan area that are in Missouri25 generate about 84 percent of the annual state taxes triggered by the SLSO.

25 These counties include the City of St. Louis as an independent city plus the counties of St. Louis, St. Charles, Jefferson, Franklin, Warren, and Lincoln. Another eight metropolitan counties are in Illinois (i.e. Metro East) based on official federal geographic definitions of metro areas. Metro West (the Missouri counties) account for roughly 80 percent of the economic activity within the entire St. Louis metropolitan area.
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