

# Saint Louis Arts Ecology

## February 8, 2019

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PRESENTATION AT THE REGIONAL ARTS COMMISSION

ARTS &: NEXT STEPS CONVENING

FEBRUARY 8, 2019

# Summary

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The DeVos Institute of Arts Management at the University of Maryland was commissioned by Centene Corporation to study the arts ecology of St. Louis. The goal of the study was to provide guidance to Centene about the needs of the artists and arts organizations in St. Louis.

The study examined two cohorts of arts organizations, those larger organizations that receive RAC funding and smaller organizations that receive project support. In-depth interviews and data surveys were performed with 60 organizations from both cohorts.

Data for arts organizations in St. Louis were also compared to data from arts organizations in six comparator cities.

The interviews focused on key strategic aspects of arts management: artistic planning, marketing (both to increase ticket sales and to engage new donors), fund-raising, board engagement and staffing.

# Major Conclusions

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Major conclusions of the study included:

- St. Louis has a remarkably large, diverse and productive arts sector that includes a large number of organizations
- The largest arts organizations are larger than their counterparts in similar size cities
- St. Louis is missing a cadre of mid-sized organizations; most organizations are very large or of modest size
- There is a great reliance on fundraising by the larger arts institutions

# Major Conclusions (cont)

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- A small group of very generous funders is providing a large portion of philanthropy in St. Louis
- Almost half the citizens of St. Louis are African American and often there are no organizations of color with budgets exceeding \$1 million
- Newer organizations have a challenge breaking into the major funders
- Artistic planning is relatively short term; this hampers ability to create larger scale projects, to raise large gifts and to attract major press interest
- Marketing expenditures are low; this makes building earned and contributed income far more difficult

# Major Conclusions (cont)

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- There is a very limited pool of trained arts managers and it isn't easy getting new staff to move to St. Louis
- Ticket prices are relatively modest and much is available for free
- Boards are not as engaged in fundraising as necessary
- Most organizations have limited national visibility
- Traditionally every organization received RAC funding; this has changed
- Arts education is needed yet coordination with the school system is limited

# Major Conclusions (cont)

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Many of these factors should guide major funders as they plan their arts philanthropy.

Ideally, a group of funders could work together to address the major issues.

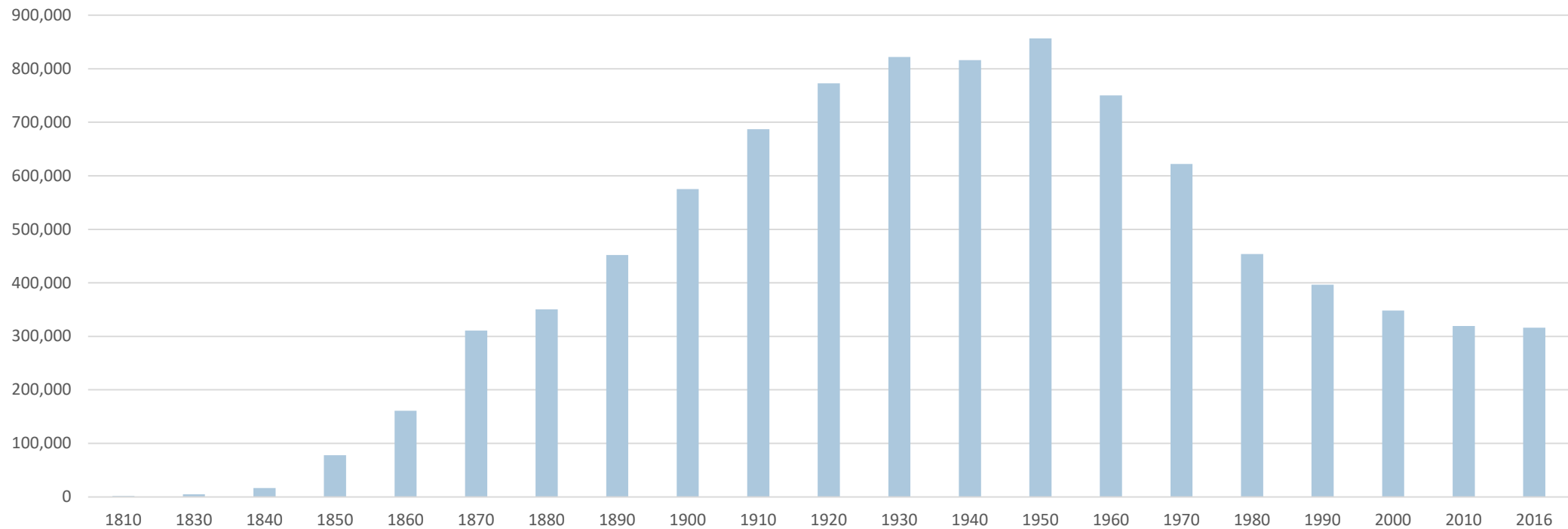
# This Study Addresses the Arts Ecology of Saint Louis

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- Saint Louis has a vibrant and distinguished arts ecology
- Several organizations have achieved national and international renown
- Important artists collaborate with the major institutions in St. Louis
- But challenges remain. A few very large organizations dominate the landscape, there are no large organizations of color, there are a large number of organizations competing for limited resources, and arts education and arts management education are limited
- This plan evaluates the current arts ecology and suggests approaches for addressing major concerns

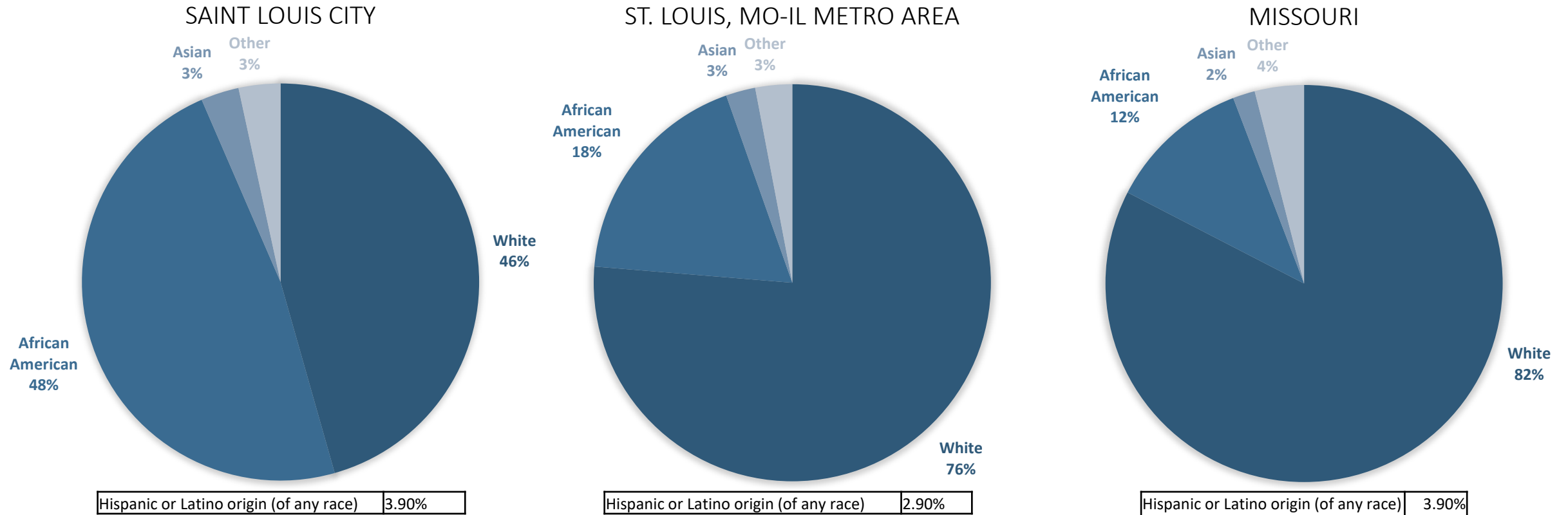
# Saint Louis City's Population Has Declined Since the 1950's

Saint Louis City Population  
Source: U.S. Census





# Saint Louis City's Ethnic Diversity Differs Significantly From its Metro Area and Missouri

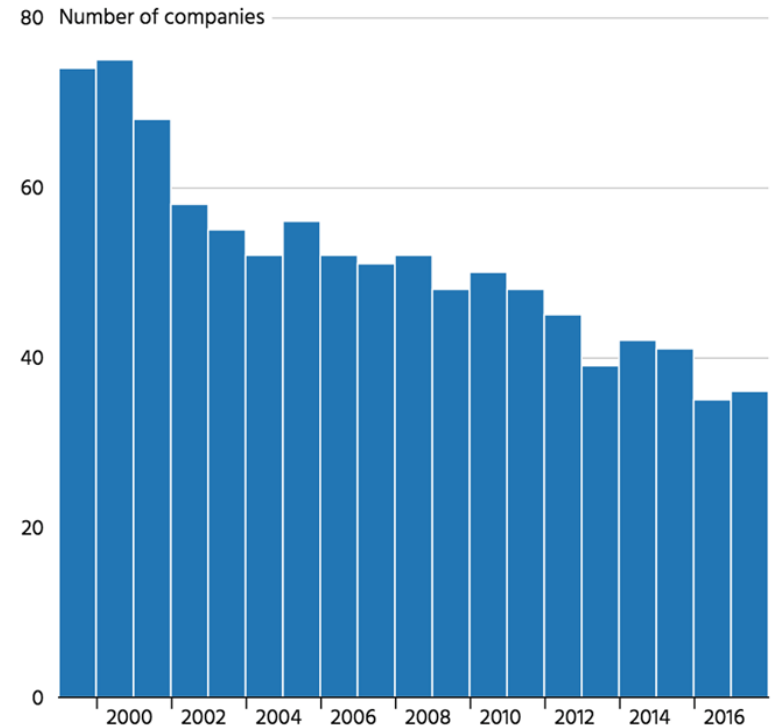


Source: U.S. Census 2012-2016 American Community Survey 5-year estimates

# Shifting Corporate Landscape

- Hardee's moves to Nashville
- Express Scripts purchased by Cigna
- Monsanto purchased by Bayer
- Panera Breads purchased by JAB Holding Co. (Caribou Coffee/Krispy Kreme)
- And: SunEdison Semiconductor, Wehrenberg movie chain, Scottrade, Save-A-Lot, Isle of Capri Casinos, Pulaski Financial, Synergetics, First Clover Leaf Financial, and more

Public companies based in metro St. Louis



SOURCE: Post-Dispatch archives

DATA SHARE

# The Over-Arching Arts Ecology is Changing

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- Reduction in arts education in the public schools
- Decrease in subscriptions
- Role of electronic substitutes
- Shrinking of the recording industry
- Aging of donor base
- Role of electronic distribution of the arts (71% of adults get arts on the internet, 51% attend a live event each year)

# Saint Louis NFP Arts Organizations

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## ***Art Museums/Visual Arts***

Saint Louis Art Museum  
Contemporary Art Museum  
St Louis Art Fair  
The Luminary  
St. Louis Artists' Guild  
International Photography Hall  
of Fame and Museum  
Art Saint Louis  
Critical Mass for the Visual Arts  
Florissant Fine Arts Council

## ***Arts District***

Grand Arts Center District

## ***Arts Education/Multi-disciplinary***

COCA  
Springboard to Learning  
St Louis ArtWorks - Youth  
Outreach  
Atrek Education Corp.  
Freedom Arts and Education  
Center  
Urban Artist Alliance for Child  
Development  
Suzuki Harmony STL  
YourWords STL

## ***Circus***

Circus Flora  
Circus Harmony

## ***Dance***

Dance STL  
St Louis Ballet  
Dances of India  
MADCO Modern American  
Dance Company  
Karlovsky & Company Dance  
OhmKaram  
Sangeetha  
Soorya Performing Arts

## ***Craft and Decorative Arts/Folk Arts***

Craft Alliance Center of Art +  
Design  
PlowSharing  
St. Louis Story Stitchers

## ***Film/Media/Public Broadcast***

Cinema St Louis  
Radio Arts Foundation  
KDHX Community Media  
HEC TV  
Italian Film Festival of St. Louis  
Continuity  
Sonic Stories

## ***Literary***

December Publishing

# Saint Louis NFP Arts Organizations

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## ***Museum***

Missouri Historical Society & Museum  
The Magic House St. Louis Children's  
Museum  
Saint Louis Science Center  
World Chess Hall of Fame  
The National Museum of Transportation  
National Blues Museum  
Museum of the Dog  
Campbell House Museum  
The Frank Lloyd Wright House in Ebsworth Park  
The Griot Museum of Black History

## ***Music***

Saint Louis Symphony  
Cathedral Concerts  
Compton Heights Concert Band  
Jazz Saint Louis  
The St Louis Children's Choirs  
The Bach Society of St Louis  
Chamber Music Society St. Louis  
Chamber Project St. Louis  
American Chamber Chorale  
CHARIS Women's Choir  
Women's Hope Chorale of St. Louis  
St. Louis Civic Orchestra  
St. Louis Low Brass Collective  
Saint Louis Classical Guitar Society  
Saint Louis Chamber Chorus  
Gateway Men's Chorus  
Gateway Festival Orchestra of St. Louis  
New Music Circle  
Old Webster Jazz & Blues Festival  
The Jazz Edge  
Town and Country Symphony Orchestra  
Twangfest  
University City Symphony Orchestra

## ***Opera***

Opera Theater of St. Louis  
Winter Opera Saint Louis  
Union Avenue Opera

## ***Park / Gardens / Zoo***

Missouri Botanical Gardens  
Laumeier Sculpture Park  
Saint Louis Zoo

## ***Performing Arts Centers / Arts Centers***

The Sheldon Concert Hall & Arts Galleries  
Kranzberg Arts Foundation  
Intersect Arts Center  
Lemp Neighborhood Arts Center

# Saint Louis NFP Arts Organizations

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## ***Theater***

The Black Rep  
The MUNY  
The Rep/ Repertory Theater St. Louis  
Stages Saint Louis  
Shakespeare Festival St. Louis  
St. Louis Shakespeare  
Metro Theater Company  
Stray Dog Theatre  
St. Louis Fringe Festival  
Upstream Theater  
Tennessee Williams Festival St. Louis  
Insight Theatre Company  
New Jewish Theatre  
Kinetic Tapestry Physical Theatre  
Max & Louie Productions  
Slightly Askew Theatre Ensemble  
St. Louis Actors Studio  
The Tesseract Theatre Company

## ***Arts Social Services***

Pianos for People  
Prison Performing Arts  
Artscope  
Urban Artist Alliance for Child Development  
South Broadway Art Project  
Gitana Productions  
Arts and Faith St. Louis  
Civic Arts Company

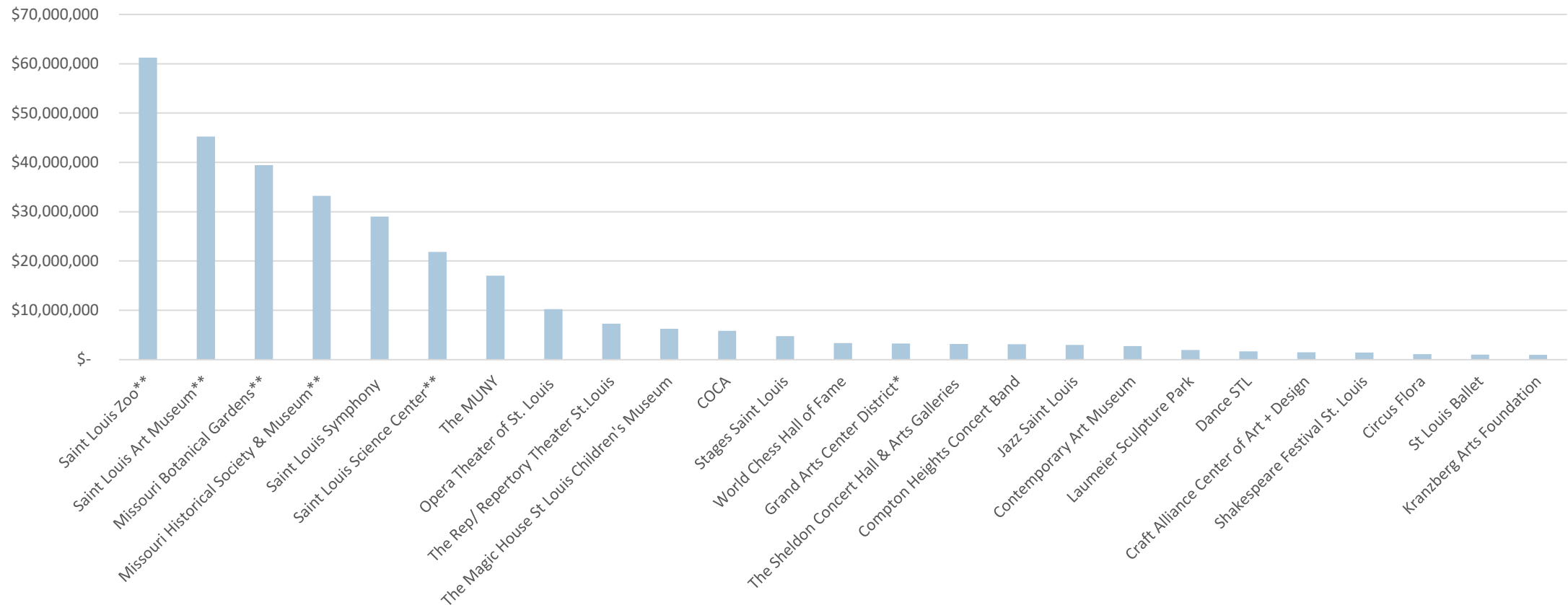
## ***Other***

Saint Louis Fashion Fund  
St. Louis African Arts Festival

# Saint Louis - Largest NFP Arts and Heritage Organizations

Saint Louis Largest NFP Arts and Heritage Orgs

\*Source: IRS 990's expense FY16, \*FY15; \*\*FY17 Financial Statements



# Major Local Foundations

Grantmaker Name	City	Total Assets	Total Giving
Greater Saint Louis Community Foundation	St. Louis	\$303,411,900	\$62,696,759
St. Louis Community Foundation, Inc.	St. Louis	\$226,242,476	\$52,900,170
Emerson Charitable Trust	St. Louis	\$17,206,701	\$28,983,482
Monsanto Fund	St. Louis	\$25,037,995	\$21,911,738
The Centene Charitable Foundation	St. Louis	\$222,431	\$17,227,444
The Crawford Taylor Foundation	Clayton	\$588,260,657	\$13,987,910
Peabody Energy Corporation Contributions Program	St. Louis	-	\$9,548,000
Steward Family Foundation	St. Louis	\$8,085,606	\$8,303,315
The JSM Charitable Trust	St. Louis	\$1,018	\$7,947,322
The Edward D. Jones & Co. Foundation	St. Louis	\$23,554,668	\$6,744,117
World Wide Technology Foundation	St. Louis	\$9,425,388	\$4,760,765
August A. Busch III Charitable Trust	Clayton	\$2,749,364	\$4,499,252
Regional Cultural & Performing Arts Development Commission	St. Louis	\$6,026,157	\$4,226,509
Ameren Missouri	St. Louis	\$3,985,390	\$3,993,474
The Bellwether Foundation, Inc.	St. Louis	\$74,969,430	\$3,854,100
The Kranzberg Family Charitable Foundation	St. Louis	\$15,517,792	\$3,760,500
Fox Family Foundation	St. Louis	\$18,747,584	\$3,564,860
Julian I. & Hope R. Edison Foundation, Inc.	St. Louis	\$21,224,743	\$2,905,035
The Stephen F. and Camilla T. Brauer Charitable Trust	Chesterfield	\$557,090	\$2,679,750
Hauck Charitable Foundation	St. Louis	\$36,345,397	\$2,163,290

Source: Foundation Center - by Total giving - with Arts and Culture Giving



# We Looked at Cities Similar in Population Size to Saint Louis City

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Corpus Christi City, Texas

Riverside City, California

Lexington-Fayette Urban County, Kentucky

Stockton City, California

Pittsburgh city, Pennsylvania

St. Paul City, Minnesota

# St Louis's Top 10 Arts Organizations are Large Compared to Similar Sized Cities

City	Low End - Top 10 Arts Organizations	High End - Top Ten Arts Organizations
Corpus Christi city, Texas	\$48,546	\$4,056,680
Riverside city, California	\$104,175	\$1,187,207
Lexington-Fayette urban county, Kentucky	\$270,738	\$1,759,870
St. Louis city, Missouri	\$6,244,269	\$61,274,245
Stockton city, California	\$21,187	\$1,402,002
Pittsburgh city, Pennsylvania	\$3,077,962	\$58,209,392
St. Paul city, Minnesota	\$1,157,789	\$18,603,600

Source: IRS 990's FY16 expenses

# We Looked at Six MSA's Similar in Size to Saint Louis

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Minneapolis-St. Paul-Bloomington, MN-WI Metro Area

Tampa -St. Petersburg-Clearwater, FL Metro Area

Denver-Aurora-Lakewood, CO Metro Area

Baltimore-Columbia-Towson, MD Metro Area

Charlotte-Concord-Gastonia, NC-SC Metro Area

Orlando-Kissimmee-Sanford, FL Metro Area

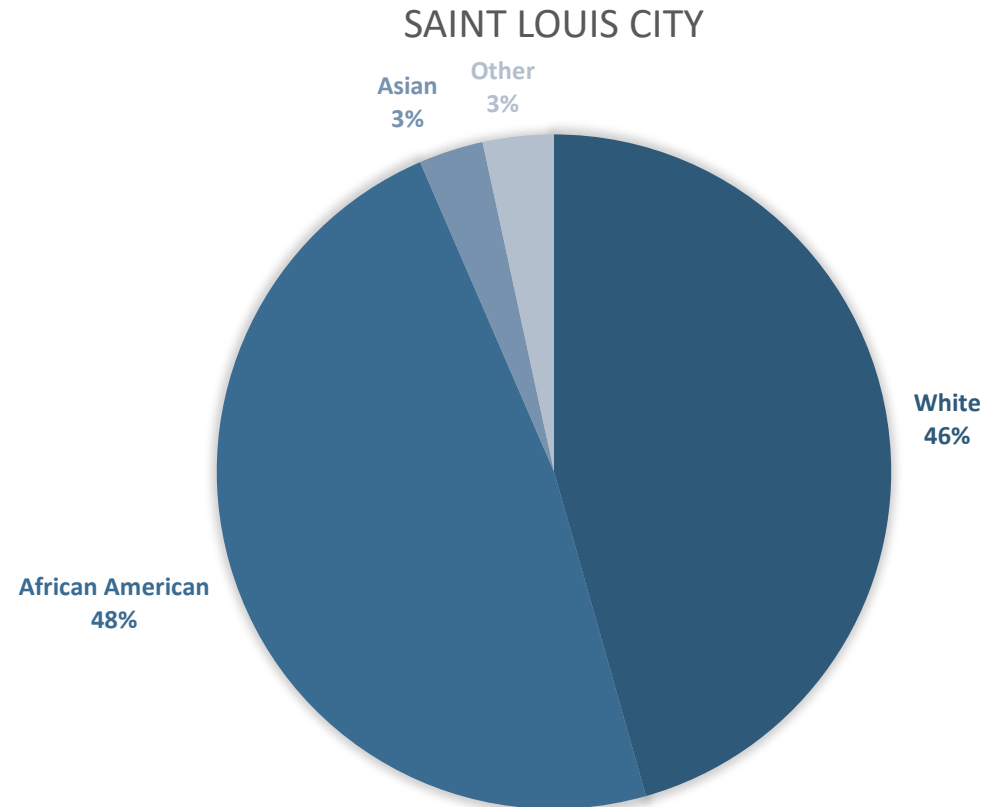
# St Louis's Top 10 Arts Organizations are Large Compared to Similar Sized MSAs

<b>MSA</b>	<b>Low End</b>	<b>High End</b>
Minneapolis-St. Paul-Bloomington, MN-WI Metro Area	\$6,760,707.00	\$39,178,897.00
Tampa-St. Petersburg-Clearwater, FL Metro Area	\$1,053,289.00	\$36,575,612.00
Denver-Aurora-Lakewood, CO Metro Area	\$3,076,794.00	\$63,128,120.00
St. Louis, MO-IL Metro Area	\$6,244,269.00	\$61,274,245.00
Baltimore-Columbia-Towson, MD Metro Area	\$1,674,333.00	\$30,598,899.00
Charlotte-Concord-Gastonia, NC-SC Metro Area	\$1,857,194.00	\$33,939,705.00
Orlando-Kissimmee-Sanford, FL Metro Area	\$940,531.00	\$26,746,192.00

*Source: IRS 990's FY16 expenses*

# While Almost Half of the Citizens in Saint Louis City Are African American...

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# ...There Are Very Few African American Arts Organizations or Institutions

Organization	Expenses
The Black Rep	\$533,971
Songs of Africa (African Musical Arts)	\$242,000
The African Heritage Association of St Louis Inc.	\$87,103
African American Experience Museum Inc.	No information available
The Griot	No information available

Source: IRS 990's FY16

- “We have 47% African American population, and only ONE African American arts institution with a budget over \$500,000”
- According to one study respondent, the African American culture exists in Saint Louis, but is vastly under-resourced and exists outside of institutionalized cultural organizations. Instead it exists through grassroots organizations, individual artist networks, and non-arts entities such as churches or community centers.

# Arts Leaders Interviews: Phase 1

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## Methodology:

- A request to participate was sent to list of RAC grantees provided by Felicia Shaw, Executive Director of the Regional Arts Commission, for the first round of interviews.
- Additional arts leaders outside of the grantee pool were also contacted
- 28 interviews were conducted, 30-60 minutes in duration.
- Questions were both quantitative and qualitative regarding their own organizations, and opinions regarding the arts ecology of Saint Louis
- Interviewees were informed that only aggregate information without identifiers would be brought forward for the study.

# Study Participants - Phase 1

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Bach Society of Saint Louis	MADCO (Modern American Dance Company )	Saint Louis Classical Guitar Society
Cinema St. Louis	Missouri Historical Society	Saint Louis Dance Theatre DBA The Big Muddy Dance Co
Circus Harmony	Opera Theatre of Saint Louis	Saint Louis Symphony Orchestra
COCA-Center of Creative Arts	Radio Arts Foundation	Sheldon Arts Foundation
Contemporary Art Museum St. Louis	Regional Arts Commission Saint Louis	Stages Saint Louis
Craft Alliance Center of Art + Design	Saint Louis Art Museum	The Luminary
Dance St. Louis	Saint Louis Artists' Guild	The Repertory Theatre of Saint Louis
Grand Arts Center District	Saint Louis ArtWorks	Union Avenue Opera Theatre
Jazz Saint Louis	Saint Louis Ballet Company	
Laumeier Sculpture Park & Museum	Saint Louis Children's Choirs	

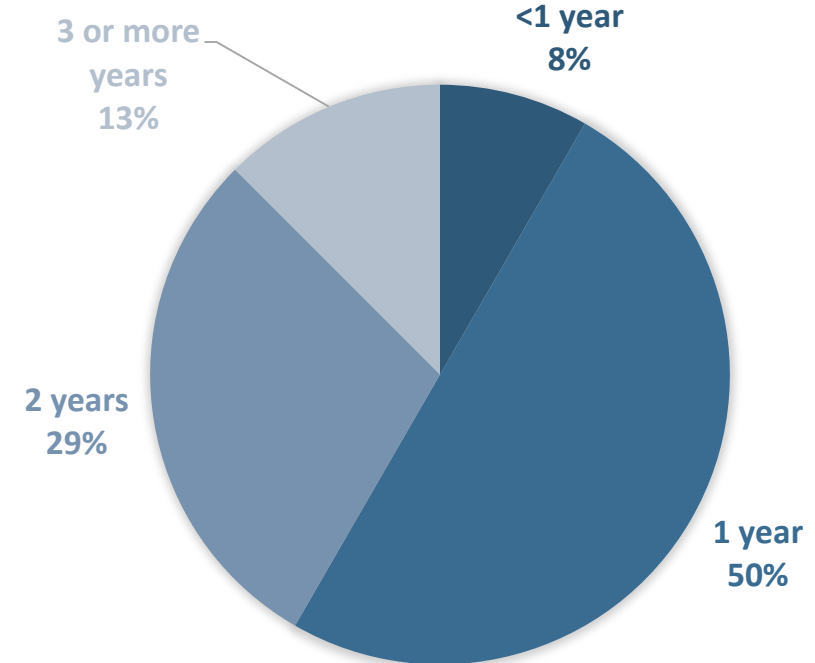


# Artistic Planning

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- Relatively short span for Artistic Planning
- Many respondents noted it had gotten better, but would like it to be longer

ARTISTIC PLANNING - HOW MANY YEARS OUT? N=26  
SOURCE: INTERVIEWS

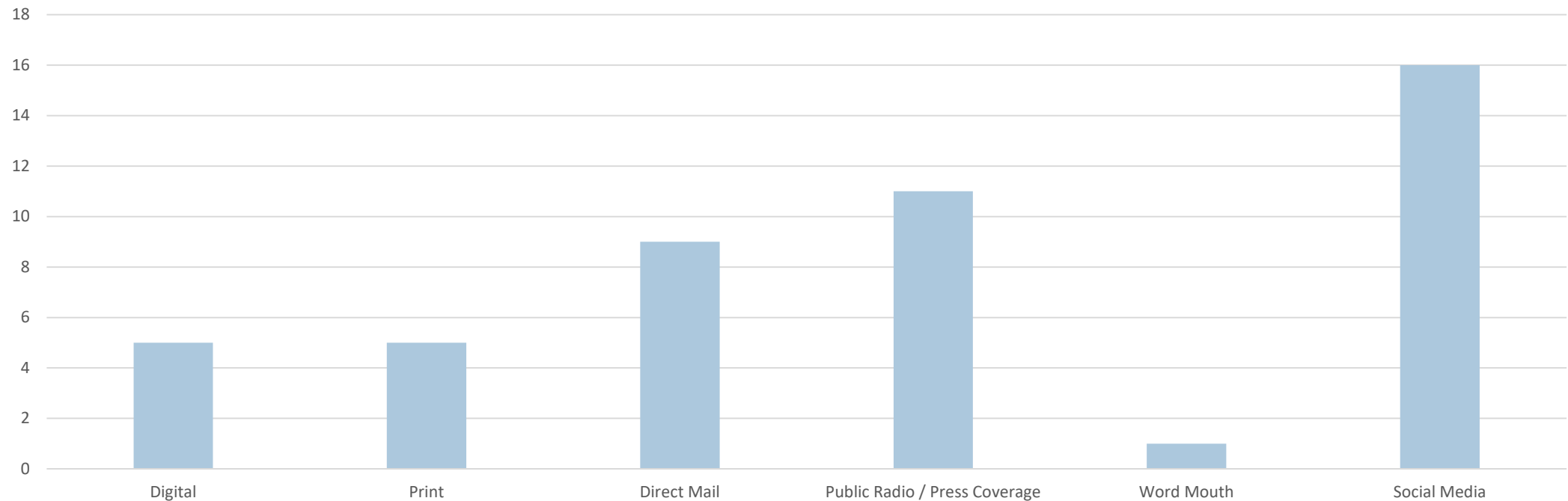


# Marketing

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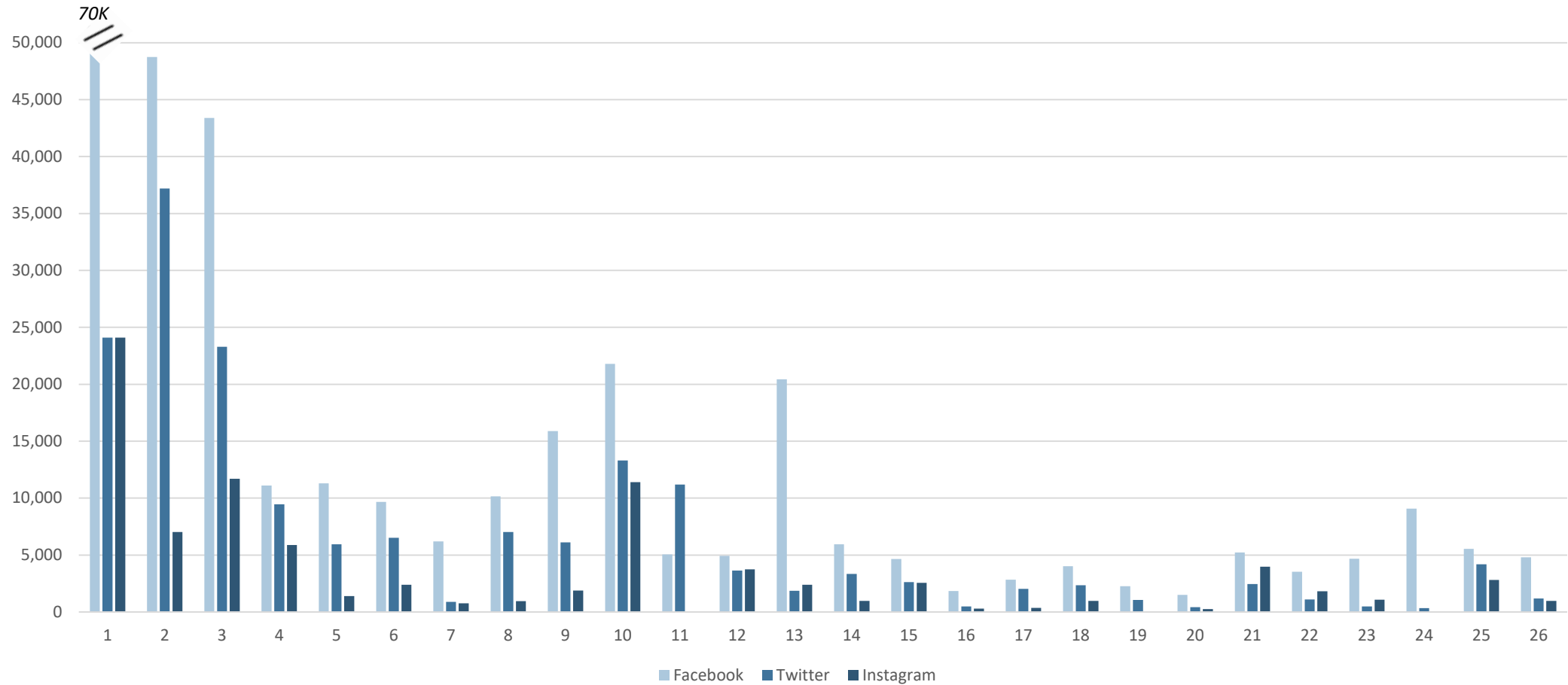
- Study respondents stated that very little spent is on marketing – both in terms of the % of budget spent on marketing, and in the respondents perception (they often say “very little” and “not enough”).
- Many organizations are using social media, not just because of using a digital strategy, but simply because they can’t afford paid advertising
- There is a strong importance in Saint Louis on partnerships with Public Radio, and coverage in print media in articles and reviews.
- There is little adoption of technology or digital interventions (aside from Social Media/Digital Ads)
- Few organizations pursue organized institutional marketing campaigns

# Main Programmatic Marketing Tactics



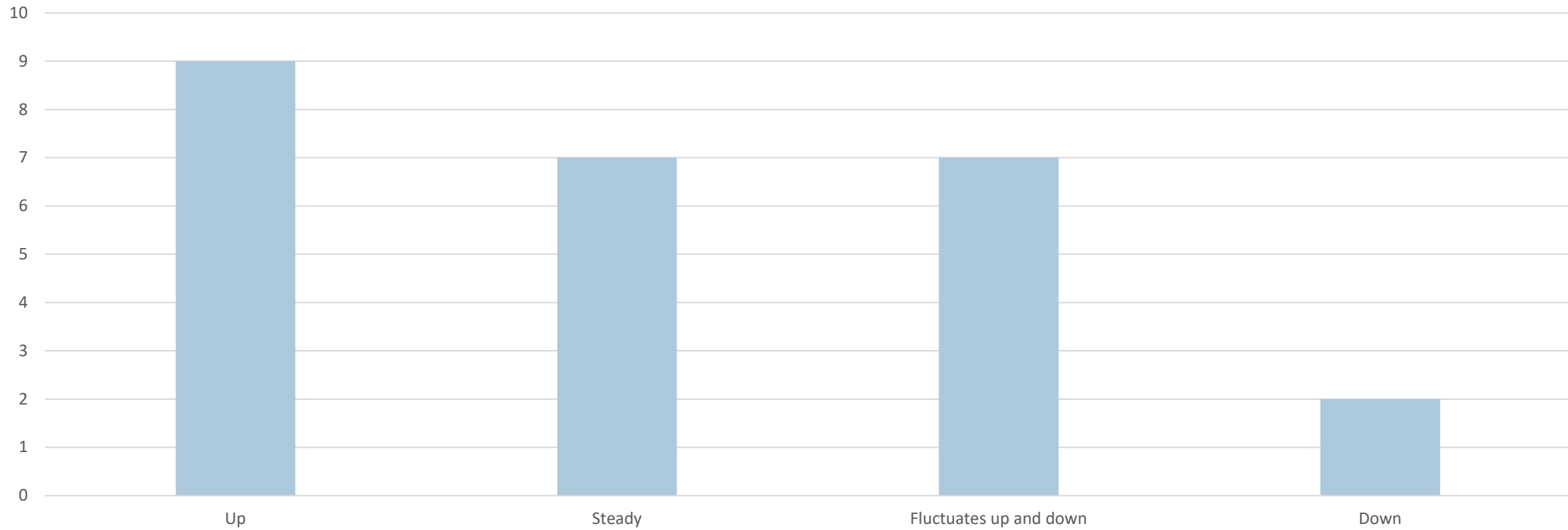
- Respondents said the use of Social Media was often about low/no cost as much as a tactical choice.
- Many respondents the importance of involvement of Public Radio in town to help promote their organizations

# Social Media Followers



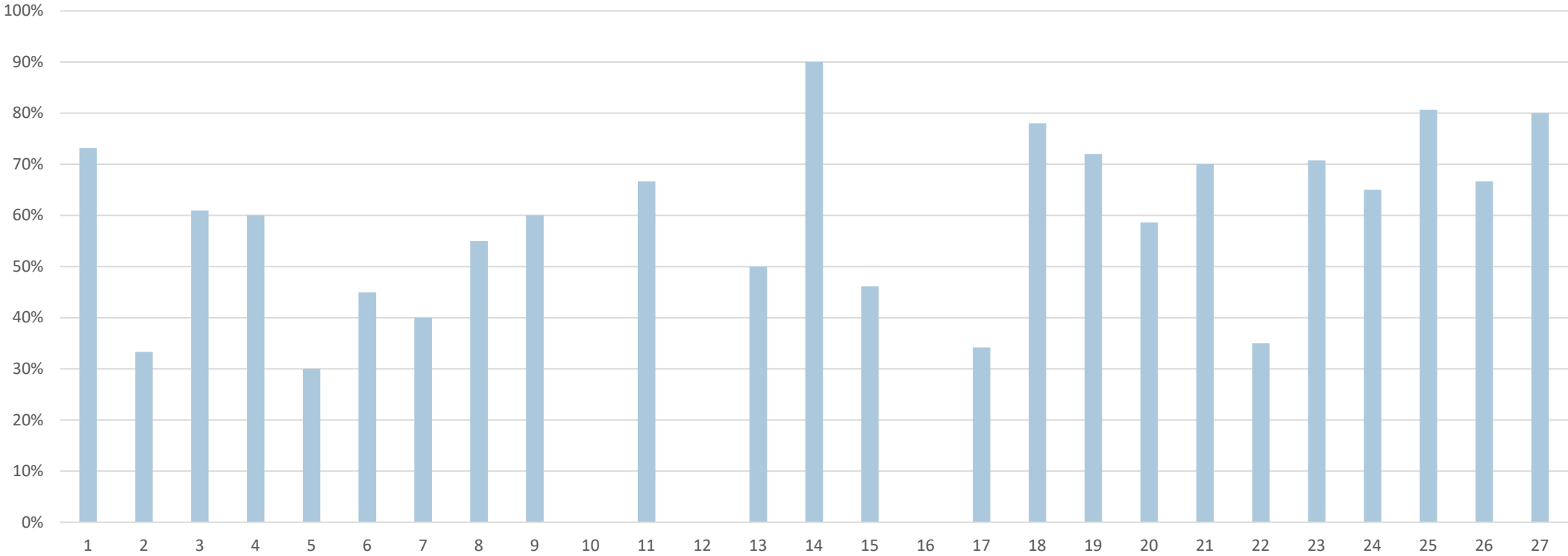
# Attendance Trends Over Last 3-5 Years

Has Attendance Been Up/Steady/Down over last 3-5 years? n=25  
*Source: Interviews. # of Organizations*



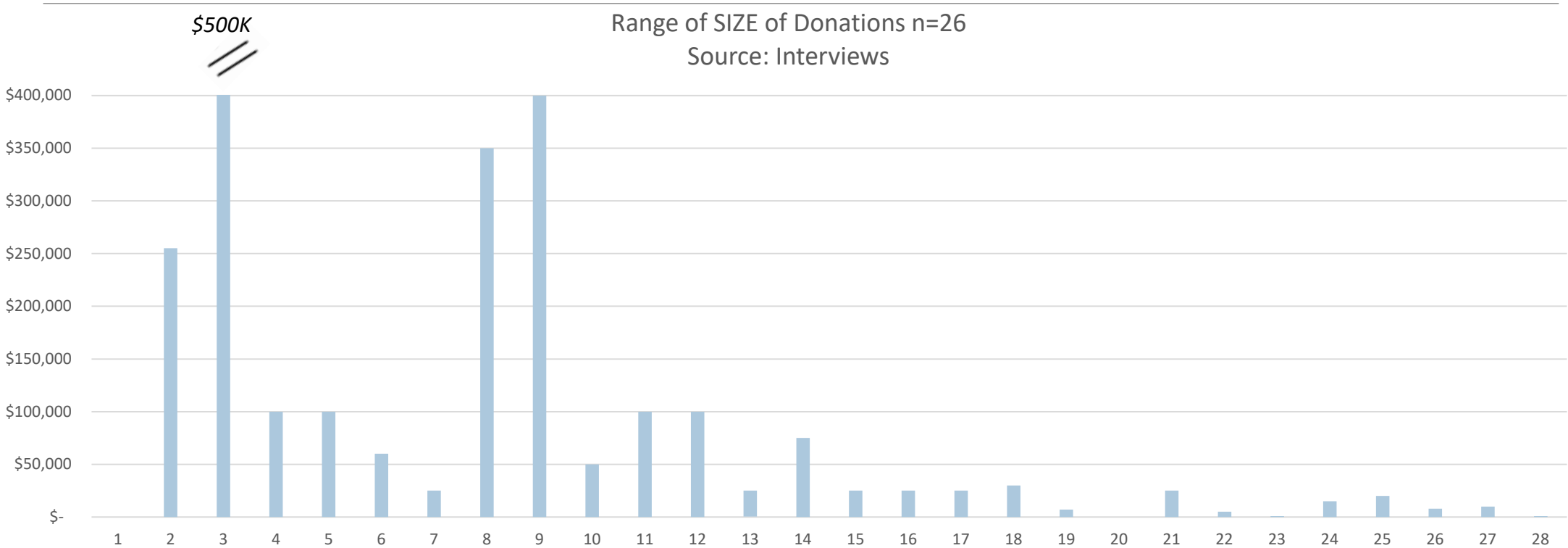
# Most Organizations Are Highly Dependent On Contributed Revenue

Contributed Revenue as % of Total Revenue n=24  
Source: Interviews. Blank = no information provided



- 3 respondents – information not provided

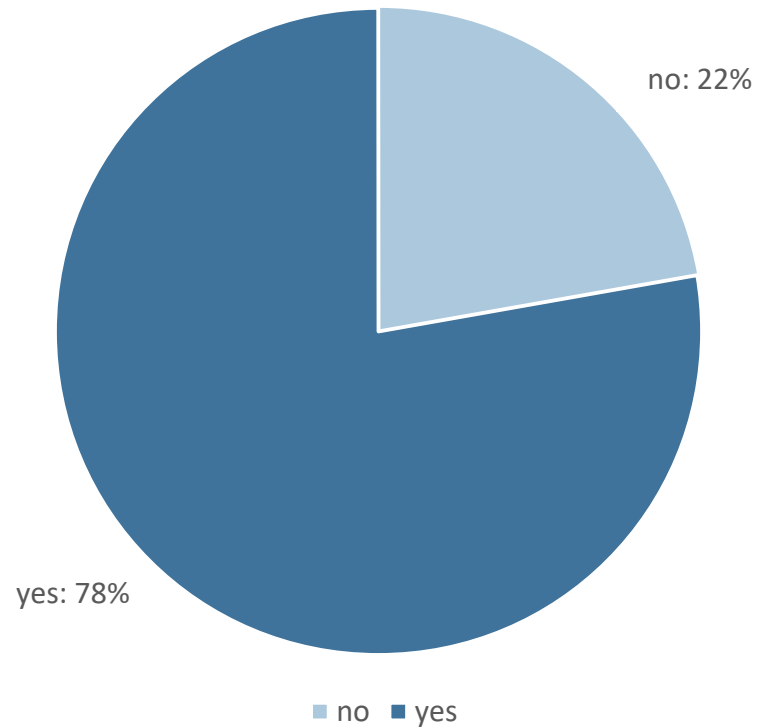
# With a Few Exceptions, the Size of Largest Individual Gifts Received is Modest



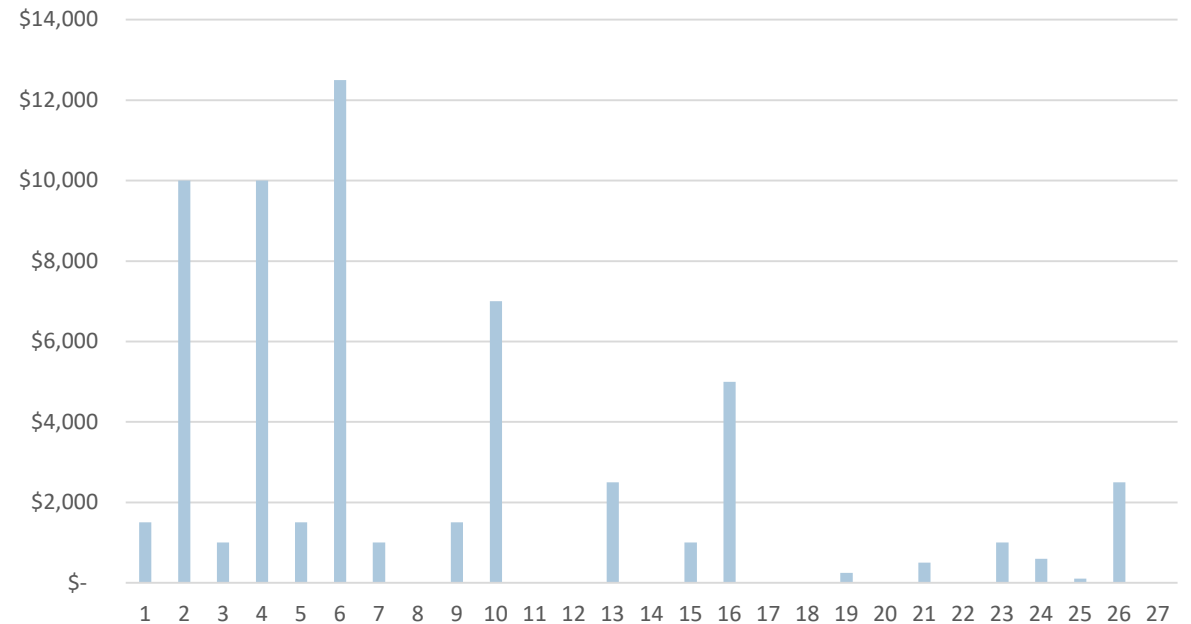
“We sat down and realized – we have lost the audience members who give us [a certain amount] – they have died or moved out of town. So why we’ve ended up with deficits – we were counting on the gifts coming in from key givers. New donors are not coming up with that kind of money. We have more donors, but not with larger gifts.”

# Board Giving Requirements Are Modest

Mandatory Give /Get Board Giving  
n=27

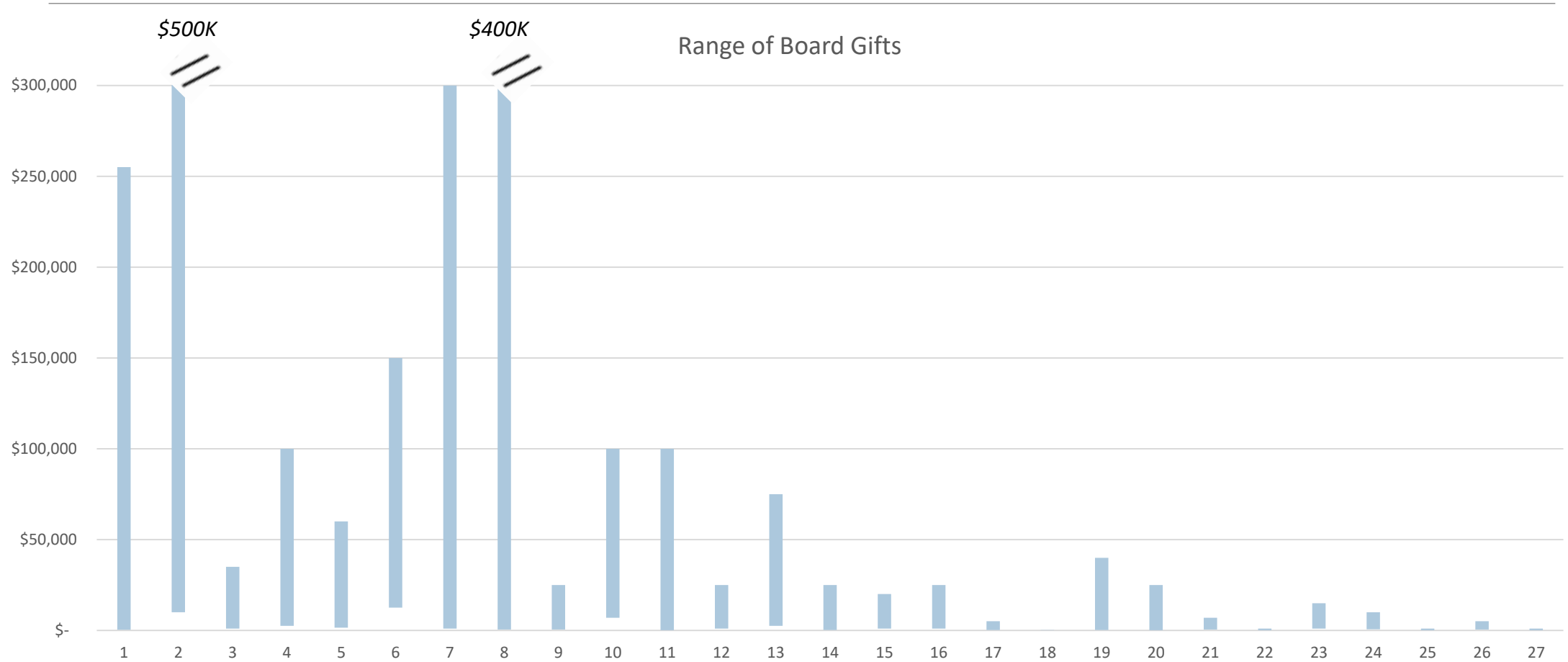


Give / Get Minimums n=18



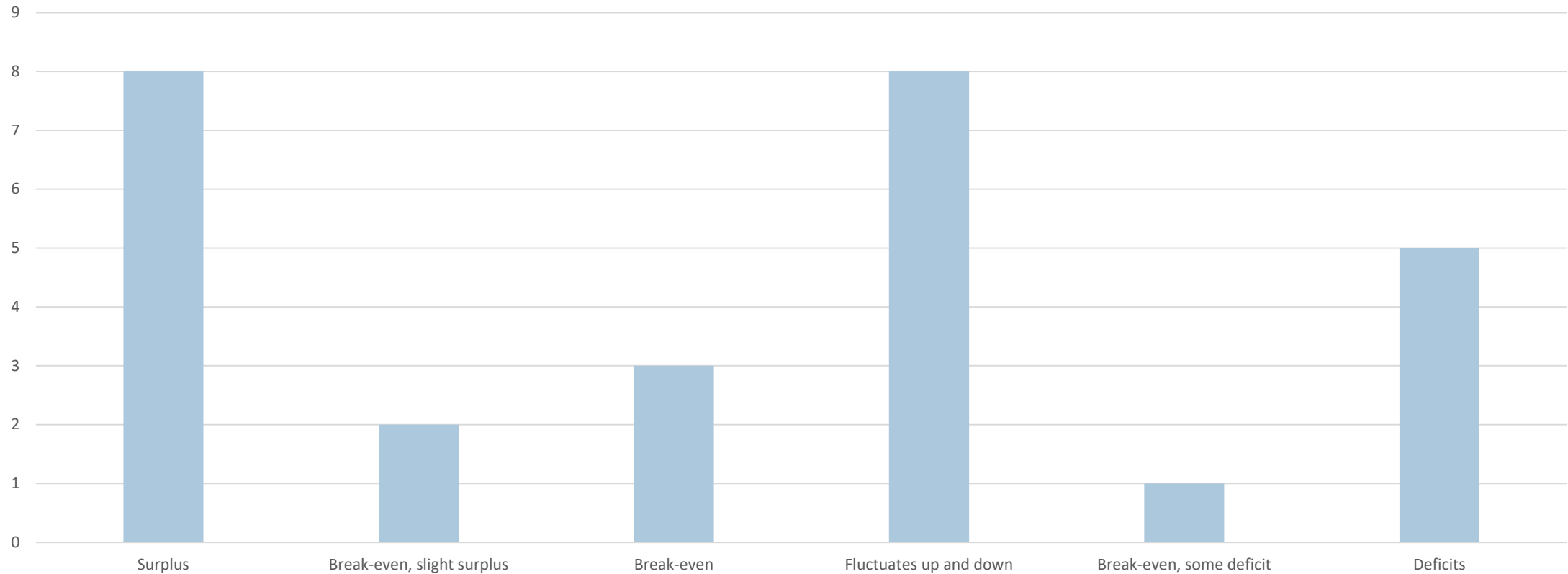


# Most Board Gifts Are Small



# Financial Performance is Mixed Amongst Respondents

Operating Budget Financial Position for Last 3-5 Years n=27  
*Source: Interviews - # of organizations*



# Audience Challenges in Saint Louis

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- Too much going on in the city for the size of the population. The arts infrastructure in place is to support the higher population, which is now gone.
- There is a high quality of arts and culture offerings, but a perception that the local audience doesn't understand just how good it is.
- On the other hand, SL citizens have civic pride and feel the 'need' to have arts and culture offerings (but they may not go)
- There is a lack of data on attendance and audience in general.

# Audience Challenges in Saint Louis – Cont'd

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- Lack of racial diversity in audiences, with exceptions in specific areas of programming (i.e. concerts geared to an African American audience, youth outreach)
- “Levels of educational achievement in SL are not high. Arts consumer is generally more educated than the average American. This won’t change. This becomes a challenge in SL”
- Impression that because there is so much for free in SL, it also means people may not value the offerings.

# The “First Ones In” Handshake Deal

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- Organizations formed in the past when Saint Louis was booming benefited from strong corporate support to become established, create endowments – these organizations are stable. But newer organizations do not have the benefit of that early start. There is a sense that if you were not ‘at the table’ at this point in history, there is no support for your organization.
- The Zoo Museum District’s specific tax levy mandated by the city: These organizations not only have guaranteed funding, but are also generally free of charge, thus giving further competition to organizations that need to charge admission.

# Small Number of Funders, Large Number of Arts Organizations

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- Too many arts organizations accessing the same pool of funding. Funders will just spread the pie thinner to all that ask.
- “There are a SMALL handful of arts funders that are subsidizing lots of organizations. Without those funders, the arts sector is FRAGILE. This distorts the reality of the needs to run an arts organization.”
- Would be helpful if funders were more consistent in their funding from year to year. Current dollars/support is fragmented and inconsistent.
- There is a perception that the majority of the resources are going to the largest institutions only.
- “There are virtually NO private foundations in SL that grant to the community. We benchmark against Cleveland, Minneapolis, Kansas City – THEY have really large private foundations with large gifting.”

# Staff and Board Challenges

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- Staff – finding and keeping good staff is a challenge. Salaries are not competitive, and when local talent is not available it is difficult to get people to move to SL for a job.
- “We need stronger board members – they are strong, but we are not renewing the talent for our boards.” It’s often the same people sitting on all the boards.

# Lack of Arts Education

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“When other cities were gaining awareness about arts education in schools, SL did NOT. It’s very immature in that sense. A lot of arts organizations do outreach intending to sell tickets for their existing programs. They are really just selling their existing programs, it’s not true arts education.”



# Summary Observations

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- St. Louis has a remarkably large, diverse and productive arts sector
- The largest arts organizations are larger than their counterparts in similar size cities
- St. Louis is missing a cadre of mid-sized organizations
- There is a great reliance on fundraising by the larger arts institutions
- A small group of very generous funders is providing a large portion of philanthropy
- Almost half the citizens are African American and there are no organizations of color with budgets exceeding \$1 million
- Newer organizations have a challenge breaking into the major funders
- Marketing expenditures are low

# Summary Observations

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- There is a very limited pool of trained arts managers and it isn't easy getting staff to move to St. Louis
- Ticket prices are relatively modest and much is available for free
- Boards are not as engaged in fundraising as necessary
- Limited national visibility
- Everyone was funded – even very small organizations
- Arts education is needed and coordination with the school system is limited

# Summary Observations

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- Disorganized efforts with public school system
- Strong need for arts management training for staff and board
- Not as much collaboration amongst arts organizations as is possible/desirable
- Modest government involvement
- Strong desire to be as visible as the Cardinals

# Arts Leaders Interviews - Phase 2

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## Methodology:

- For the 2nd Round - an additional list of groups and organizations was targeted via a list provided by Felicia Shaw, Executive Director of the Regional Arts Commission.
- In many cases these are smaller arts organizations, or non-arts institutions with arts projects funded by RAC.
- 32 interviews were conducted by DVIAM, and were 20-30 minutes in duration.
- Questions were both quantitative and qualitative regarding their own organizations, and opinions regarding the arts ecology of Saint Louis
- Interviewees were informed that only aggregate information without identifiers would be brought forward for the study.

# Study Interviews - Phase 2

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African Heritage Association of St Louis

American Chamber Chorale

Arts and Faith St. Louis

Artscope

Atrek Education Corp.

Chamber Music Society St. Louis

CHARIS

Continuity

Cultural Festivals

Dances of India

Deaf Empowerment Awareness Foundation

December Publishing Inc

Freedom Arts and Education Center

Gene Slay's Girls & Boys Club of St Louis

Gitana Productions

International Institute of St Louis

Kingdom House

Midwest Artist Project Services

Perennial

Pianos for People

Prison Performing Arts

Saint Louis Fashion

Saint Louis Fringe Festival

Sonic Stories

St Louis Civic Orchestra

St Louis Low Brass Collective

St Louis Story Stitchers Artist Collective

Tennessee Williams Festival St. Louis

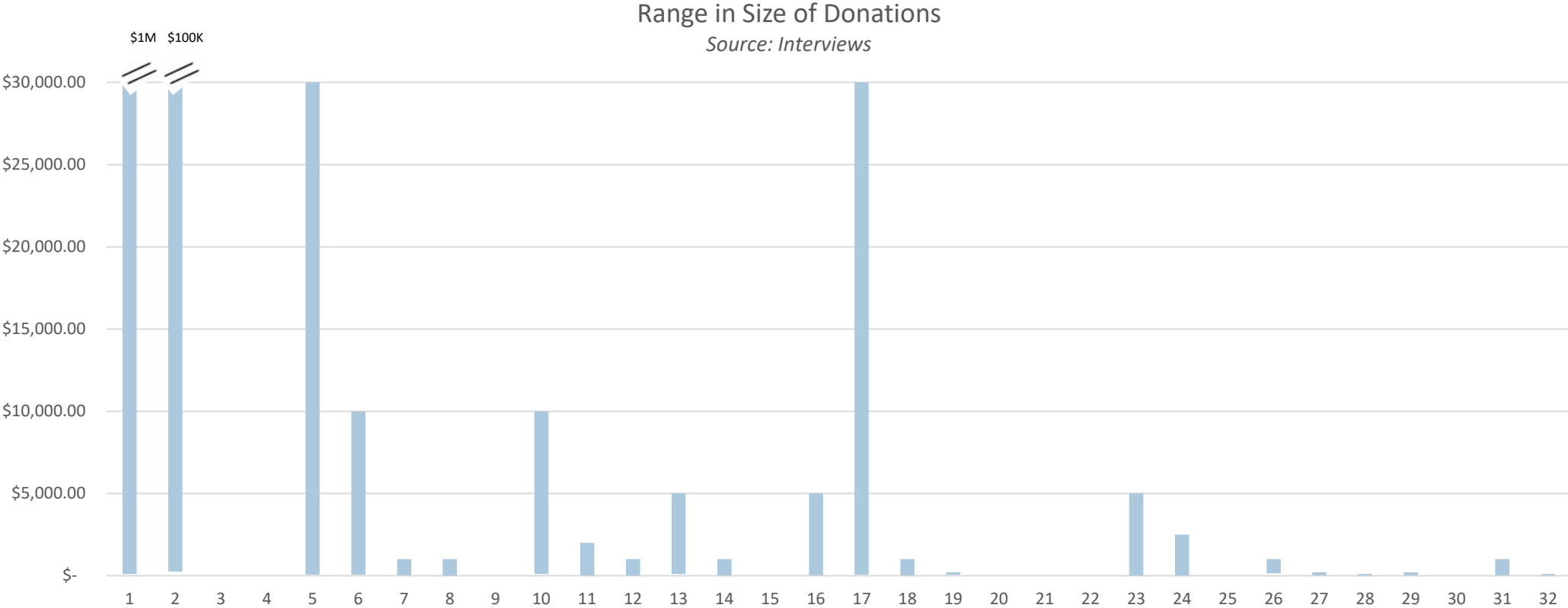
The Black Rep

The Magic House St Louis

Upstream Theater

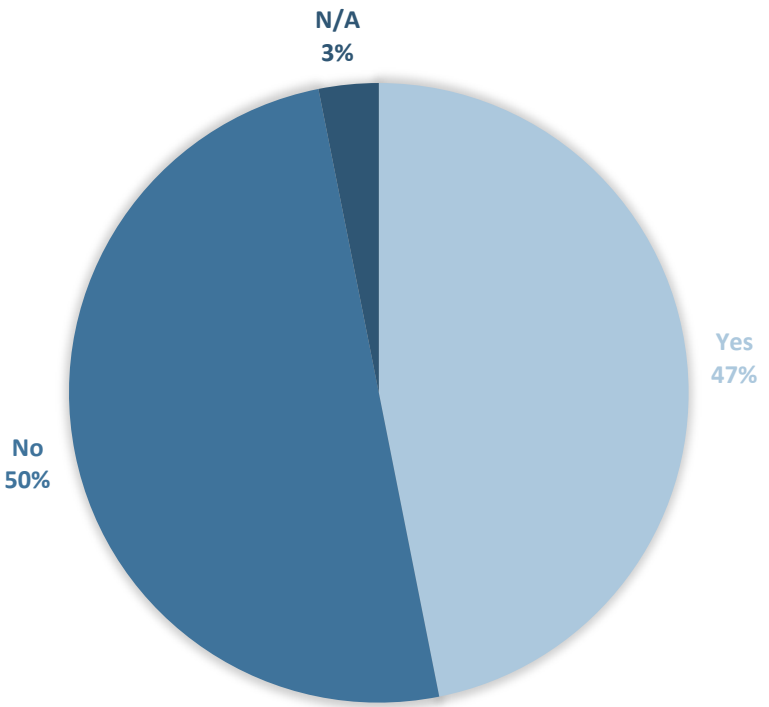
Urban Artist Alliance for Child Development

# With a Few Exceptions, Donations Are Small

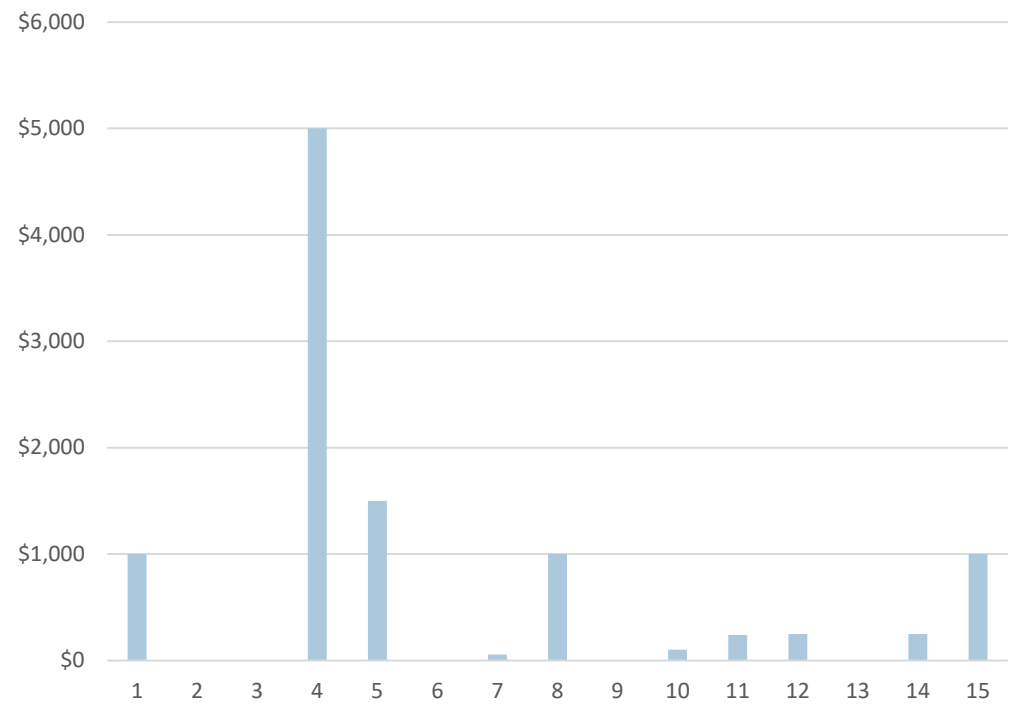


# Most Receive Small Gifts from Board Members

MANDATORY BOARD GIVE/GET? (N=32)



Minimum Board Donation Requirement (n=15)  
(If there is Mandatory Give/Get)



# The Concerns of This Cohort Are Similar to Those of the Larger Organizations

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- Major Areas of Concern:
  - Access to Funding
  - Inequity of Funding
  - Staff Challenges
  - Board Challenges
  - Geographic and Racial Segregation
  - Political/Government Challenges
  - Lack of Collaboration
  - Audience Engagement
  - Lack of Press Coverage
- Note from the Interviewers - quite a number of this cohort did not have knowledge or familiarity with their financials, even if they were the E.D.'s or Board President



# Conclusions

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- Saint Louis has a long and distinguished history in the arts
- There is a need for addressing many substantial concerns about the current arts ecology:
  - The need for more equity
  - The need for growth of organizations of color
  - The need for investment in mid-sized organizations
  - The need for capacity building
  - The need for more arts education
- It would be ideal if a consortium of funders could collaborate to address these concerns and to consider the proposed strategies