



SOUND  
DIPLOMACY

# ST. LOUIS

## MUSIC INITIATIVE ASSESSMENT

Presented by Sound Diplomacy for Kranzberg Arts  
Foundation and the Regional Arts Commission

November 2022

Executive Summary



# FOREWORD

## REGIONAL ARTS COMMISSION OF ST. LOUIS

In 1985, the citizens of St. Louis voted to ensure that the arts weren't a luxury but a necessity. At that time, the Regional Arts Commission of St. Louis was born.

**Grantmaking is at the heart of what we do. In the last 37 years, we've given more than 7,000 grants worth \$100 million – making RAC the largest public funder of the arts and music in the region.**

Another cornerstone of our work is advocacy. St. Louis is an arts town, and the arts mean business. When we embrace the arts, we embrace economic growth in our communities. Music is an integral part of that growth. The St. Louis music industry provides jobs for our citizens, sales for local restaurants and shops, clients for small businesses, full hotels, and revenue for local and state government.

There is a deep well of musical talent in St. Louis, and our venues range from historic to state of the art. While much has been done to support the music industry, our journey is just beginning. By working together on strategy, professional development, funding, and attracting new audiences, we can lift up St. Louis musicians and the sector as a whole. Sound Diplomacy will give St. Louis the data it needs to move the sector forward.

**Vanessa Cooksey,  
President and CEO,  
Regional Arts Commission  
of St. Louis**

Cover Image © Phillip Hamer

# INTRODUCTION

## SOUND DIPLOMACY

We are honored to have had the opportunity to collaborate with the St. Louis Music Initiative, the Kranzberg Arts Foundation, and the Regional Arts Commission over the past two years.

**This project began with the intention of cultivating a civic voice for the St. Louis music community by ensuring that their experiences, values, and contributions were recognized. Throughout the process, that objective never wavered.** St. Louis is a haven of talent – past, and present – and through this work, the potential of policies being adopted to better support this talent has expanded. Conversations with local musicians, business owners, and stakeholders have revealed what we all knew from the beginning: that St. Louis's dynamic music ecosystem is built on a foundation of innovation, unity, and a rich history of stylistic diversity

and that it has the capabilities of being one of the world's greatest music communities in talent, policy, action, and engagement. This report and the recommendations therein are an extension of the ingenuity that already exists and are written with the foremost respect for what has come before, what exists now, and what's to come in the future. We hope that this report – and the data and evidence it contains – remains a living document and guiding light that St. Louis – across all sizes, levels, and structures of government and civic society – can use and adapt to strengthen this

thriving music ecosystem that will become a model regionally, nationally, and internationally. St. Louis does not lack enthusiasm or dedication in these endeavors, but that enthusiasm needs to be met with policy, structure, and equitable governance. We remain indebted to this incredible city and look forward to continuing to push forward as it evolves into a beacon of musical sustainability, equity, and community.

**Shain Shapiro,  
Founder and Chairman,  
Sound Diplomacy**





# 1.1 ABOUT THE PROJECT

## PROJECT DESCRIPTION

In 2020, Sound Diplomacy began developing a music assessment to ensure the prevalence of the City of St. Louis' music economy.

### THE OBJECTIVES OF THIS PROJECT WERE TO:

- Assess St. Louis' music ecology, determine its strengths, and deficiencies, and identify what requires addressing
- Shift the perception of music as an amenity to music as an economy, building a safety net for the music community
- Position St. Louis as a national leader in leveraging music as a recovery and community development tool
- Provide data to ensure all levels of government, as well as the public, celebrate the importance of music.

The music industry in St. Louis reinforces the city's vibrant and eclectic reputation, enhancing its appeal amongst residents, workers and visitors alike. The data speaks for itself, but it's the voices that form the music ecosystem that have tirelessly contributed to this report, shining the light on the significance of the industry – the relationships formed around music; the established careers; the wellbeing boosted by listening to, interacting with and performing music; and the social, economic and cultural impact

that this industry has that reaches beyond the city's borders to the metropolitan region, and further afield. The music sector across the Greater St. Louis Metropolitan Area (hereafter referred to as 'Greater St. Louis' or 'region') has a greater share of the region's employment than the national average (2% compared to 1.3%). With findings that show a total economic output of \$2,120 million, a total Gross Value Added (GVA) of \$1,310 million and support of 28,135 jobs, Sound Diplomacy is able to provide statistical evidence that the music ecosystem feeds into the region's economy. Yet, we have found areas that require further attention to build a sustainable music ecosystem in St. Louis.

The decision to focus the report on the City of St. Louis (hereafter referred to as St. Louis) was made in order to develop a more comprehensive exploration of the music ecosystem. By honing our study on the city, we have been able to look more closely at the regulatory infrastructure that can impact the music industry, and develop tailored recommendations for St. Louis going forward, although it is worth noting that a number of these require collaboration and

partnership with stakeholders and decision-makers outside of the city. However, it would be remiss of the team to discount the impact that the music ecosystem across Greater St. Louis has, therefore sections such as the Music Asset Mapping and the Economic Impact Assessment look outside of the City of St. Louis, and across the Region respectively.

The following report is designed to highlight the importance of the St. Louis music ecosystem, whilst reviewing areas that require further support, infrastructure, and consideration. The findings are summarized in the 19-point strategic plan, which looks at policy and community initiatives to support the sector. These offer a holistic perspective by focusing on the following dimensions: zoning and planning, licensing and regulations, health and safety, economic development, music education, city positioning, and music tourism.

# 1.2 METHODOLOGY

### REGULATORY ASSESSMENT AND LITERATURE REVIEW

Analysis of local, national, and international literature relevant to both the industry profile and ecosystem assessment objectives in the City of St. Louis.

### STAKEHOLDER ENGAGEMENT

In the form of roundtable discussions, interviews and an online survey, 245 stakeholders were engaged in order to understand the music ecosystem in St. Louis.

### SWOT ANALYSIS

A full analysis of all findings to provide insight into the strengths, weaknesses, opportunities and threats to the music ecosystem.

### STRATEGIC PLAN

Informed by the above research, a set of 19 actionable recommendations that serve as the blueprint for developing and maintaining a thriving music ecosystem in St. Louis, and in some circumstances, Greater St. Louis.

### COMPARATIVE ANALYSIS

Analysis and descriptions of four US cities (New Orleans, Memphis, Indianapolis and Asheville) and their relevance to St. Louis.

### MUSIC ASSET MAPPING

Identification of music-related assets in Greater St. Louis. Using data selected and provided by the Regional Arts Commission of St Louis, and the Kranzberg Arts Foundation, Sound Diplomacy created the online and interactive [map](#).

### ECONOMIC IMPACT ASSESSMENT

An assessment of the direct, indirect and induced economic value of the music ecosystem in Greater St. Louis (MO-IL), as well as the economic impact of COVID-19 measures during 2020.





## 2. REGULATORY ASSESSMENT

### ST. LOUIS AT A GLANCE

This section provides insight into the various regulations, policies, and resources that contribute to the St. Louis music ecosystem. For the purpose of this study, and in order to provide an in-depth analysis of the music ecosystem, the regulatory assessment focuses solely on the City of St. Louis. The following table looks at the most relevant policies, frameworks, and aspects of St. Louis to the music industry. Justifications for why these were chosen can be found in the footnotes, while the table details what exists, what doesn't exist, and other cities, regions, or countries where St. Louis can look to for best practices as guidance.

TOPIC	IN PLACE?	CITY'S POLICY	BEST CASE
NIGHT TRANSPORT <sup>1</sup>	No	Most bus routes stop by 1 a.m. and don't start again until after 4:30 a.m., this is the same with the MetroLink. The "OneSTL Plan for a Prosperous, Healthy, Vibrant St. Louis region" includes plans for advancing public transit use to connect arts, culture, and innovation hubs. <sup>2</sup>	Austin has an extended 1 a.m. curfew on Metro services on weekends and five Night Owl bus routes Mon-Sat from midnight until 3 a.m., connecting nightlife hubs and local neighborhoods every 20 to 30 minutes. The E-Bus (Entertainment Bus) network brings students back from downtown to student housing areas between 8:30 p.m. and 3 a.m., Thursday to Saturday. <sup>3</sup> The E-Bus is currently suspended due to the pandemic, however, plans to resume the service once possible.
AGENT OF CHANGE <sup>4</sup>	No	St. Louis does not currently have an Agent of Change policy in place.	Chapter 116 of the San Francisco Administrative Code was approved in December 2015 and requires venues to maintain the sound levels they operate at within the limit of their entertainment permit in order to remain under legal protection. It is the responsibility of the property developer to inform any new residents of the existing sound in the area. San Francisco also protects music venues from hotel and motel sound complaints within 300 feet of the venue. <sup>5</sup>
MUSIC OFFICE <sup>6</sup>	No	There is no Music Office in St. Louis. The Regional Arts Commission (RAC) acts as the arts agency for the region. <sup>7</sup>	The Austin Music Office sits within the Economic Development Department's Music and Entertainment Division. The Music Officer liaises with the Texas Music Office. Strategic priority areas include the affordability of spaces, land use regulations, and entertainment licenses. <sup>8</sup> The Office also acts as a resource center and booking intermediary, liaising with interested parties and a database of 2,000 Austin musicians <sup>9</sup> ; it provides touring artists with contacts to local performing venues <sup>10</sup> , and its website hosts links to local music organizations, as well as publishing a music venue guide.
CITY-LED GRANTS <sup>11</sup>	Yes	The RAC runs four cultural grants, however, two of these have been suspended until 2023.	The Denver Music Advancement Fund was launched in 2018 as a collective investment led by Denver Arts & Venues (A&V) to support initiatives that advance the Denver Music Strategy and the city's IMAGINE 2020 cultural plan. The first edition of the Music Advancement Fund awarded \$100,000 across 29 organizations that supported Denver's music ecosystem in 2018-2019. <sup>12</sup>

TOPIC	IN PLACE?	CITY'S POLICY	BEST CASE
MUSIC CURFEWS <sup>13</sup>	Yes	Music and sound can not be emitted from a noise source at a decibel level greater than 64db between 10 p.m. and 7 a.m. for longer than 15 minutes, with the time allowed decreasing as the decibel level increases (e.g 8 minutes for 67-69, 4 minutes for 70-72, and so on). <sup>14</sup>	Longer opening hours that were introduced in Amsterdam have led to staggered dispersal and quieter patronage. Venues and events that receive special licenses are evaluated on an individual basis to ensure that their cultural programming contributes to the attractiveness and diversity of Amsterdam. This requires extensive licensing work but is a long-term solution for the sustainability of tourism as well as the vitality of the city and its nightlife. <sup>15</sup>
EVENT PERMITTING <sup>16</sup>	Yes	The Office of Special Events requires applications to be submitted no later than 60 days before an event. The non-refundable \$25 application fee must be mailed to City Hall to complete the process. <sup>17</sup>	The Tampa, Florida Special Events webpage and guide is the government website that lists all relevant information, contacts, and processes for running events in the city. The 'Customer Guide to Special Events' is a user-friendly, downloadable document with clear and concise information on how to run an event created by the City of Tampa Office of Special Events. <sup>18</sup>
LIQUOR PERMITTING <sup>19</sup>	Yes	Liquor licenses are managed and processed by the City's Excise Division. A non-refundable processing fee of \$450 is required at the time of submission and for an additional \$100 applicants can receive a map of properties and owners in the surrounding area. Applicants must retrieve a tally sheet and approval petition from the Excise Division and gain majority consent (51%) from neighborhood businesses and tenants. <sup>20</sup> While most information and applications are available online, they must be submitted in person.	The Iowa Alcoholic Beverages Division (ABD) processes all applications online. An e-licensing user guide for applicants provides a single, user-friendly document that clearly explains the process for each situation with definitions, breakdown of processes, and advice on how to apply. <sup>21</sup> There is no population quota on licenses.
NOISE LAWS <sup>22</sup>	Yes	St. Louis City Ordinance 68130 lays out the noise ordinance regulations for the city based on zoning and land use designations. Properties with commercial land use designations have different stipulations based on the time of day and the duration of the noise during the time of measurement. <sup>23</sup>	The Environment Protection Authority (EPA) of South Australia prepared "Guideline: Music noise from indoor venues and the South Australian Planning System". In order to avoid excessive noise from music premises, the EPA encourages new and existing music venues to have a certification by an acoustic engineer. Another criterion is that noise from music venues "should not exceed 43 decibels in any one-third octave band between and including 31.5 Hz and 125 Hz when assessed inside a noise-sensitive development". <sup>24</sup>
BUSKING <sup>25</sup>	Yes	Following a First Amendment court challenge, the St. Louis City Board of Aldermen repealed its street performer ordinance in 2013. Street performers don't need to audition or purchase permits. They are free to perform in any "public area," although they are subject to regulations prohibiting disturbing the peace, the obstruction of public passageways, aggressive panhandling, dangerous fires, and intrusive noise. However, some venues and attractions control the sidewalks surrounding their facilities. <sup>26</sup> St. Louis Street Performers United published a best practice guide to inform street performers of their rights, performance guidelines, recommended performance areas, and suggestions for audience interaction. The guide also provides information regarding sound ordinances, safety, insurance, and legal aid. <sup>27</sup>	Developed by the Asheville Buskers Collective, the Asheville Busking Guide looks to give any busker or potential busker the dos and don'ts of busking in the city of Asheville. <sup>28</sup> Advice includes busking etiquette, the rights of a busker to perform on public property, and laws that must be followed, including no drinks/drugs, only performing between 10 a.m. and 10 p.m., and not busking in a space designated for a community event.



TOPIC	IN PLACE?	CITY'S POLICY	BEST CASE
ENTERTAINMENT DISTRICTS <sup>29</sup>	Yes	St. Louis' entertainment districts include: Ballpark Village; <sup>30</sup> Laclede's Landing Riverfront District, The Grove, <sup>31</sup> Cherokee Street, <sup>32</sup> and Grand Center Arts District, <sup>33</sup> which caters to the creative sector with eclectic venues, art galleries, and restaurants. <sup>34</sup>	The Quartier des Spectacles is downtown <b>Montreal's</b> primary entertainment and arts district. It boasts over 30 performance venues as well as public spaces. The district was designed for music and cultural events, with the surrounding infrastructure including lamp posts designed for rigging and illuminated walkways. During the summer, the area is pedestrianized. The district can host 50,000 people in its various spaces. <sup>35</sup>
MUSIC WORKSPACE/HUB <sup>36</sup>	No	There is no music-specific workspace/hub in St. Louis.	The Music District in <b>Fort Collins, CO</b> has ten music-related businesses, and its offices are 80% music-related. Tenants have below-market rent. The district has rehearsal space, educational resources, networking opportunities, and an Airbnb for touring artists. <sup>37</sup>
ECONOMIC DEVELOPMENT INCENTIVES <sup>38</sup>	Partial	The only relevant economic development incentive is the Missouri Department of Economic Development's Historic Tax Credit which applies to the redevelopment of commercial and residential historic structures. <sup>39</sup>	The <b>Georgia</b> Music Investment Act provides income tax credit of 15% for the production of live musical or theatrical performances or recorded musical performances. The credit is available to Georgia musicians and music producers who spend at least \$500,000 in Georgia during a tax year. If recordings are produced for a movie or TV show, the credit is allowed for a lower spending level, \$250,000. Small productions can get a credit if they spend at least \$100,000 on recorded musical performances. <sup>40</sup>
MUSIC TOURISM STRATEGY <sup>41</sup>	No	Although tourism is included within the City of St. Louis Sustainability Plan, there is no dedicated music tourism strategy for the city.	<b>Hamburg</b> , Germany has a music tourism strategy that attracts thousands of visitors every year to the city. With designated budgets for the marketing of the music industry, it supports music events such as Rock am Ring, Wacken Open Air, and Reeperbahn. Reeperbahn doubles as one of the country's most important conferences in the music industry. Every year, it attracts an average of 30,000 industry professionals and festival goers who contribute significantly to the overall economy of the city. <sup>42</sup>
ENVIRONMENTAL SUSTAINABILITY AND RECYCLING <sup>43</sup>	Yes	The <i>City of St. Louis Sustainability Plan</i> was adopted in January 2013. The Plan has seven arts, culture, and innovation objectives each with its own strategies. <sup>44</sup> The <i>OneSTL Plan for a Prosperous, Healthy, Vibrant St. Louis Region</i> includes an objective to "Broaden public involvement in cultural and arts institutions, which provide informal education related to arts, culture, heritage, sustainability, and the environment." <sup>45</sup> The St. Louis Office of Sustainability is responsible for overseeing the implementation of sustainable initiatives. <sup>46</sup>	Visit <b>Belfast</b> (tourism lead for the city) has partnered with Belfast City Council to commit to the development of a sustainable tourism plan and new sustainability policy. The City Council is also working to ensure organizations they fund and council-run festivals are delivered with the least amount of environmental impact possible. <sup>47</sup>
AUDIENCE DEVELOPMENT PROGRAMS <sup>48</sup>	Yes	In response to a surge in support of the Black Lives Matter Movement following the murder of George Floyd, several arts and cultural organizations in St. Louis reassessed their policies and commitments to communities of color and developed new ways to engage the community through culture and music.	TRESC <b>Barcelona</b> is an online community for those interested in culture. It is organized via an affordable membership arrangement, with prices ranging from free to €4 (\$4.23 USD) per month. It has over 100,000 users and is subsidized by the Spanish government, the Ministry of Culture and Sport, and supported by the Catalanian government's Department of Culture. <sup>49</sup>



### 3. MUSIC ASSET MAPPING



# ASSET MAPPING IN ST. LOUIS

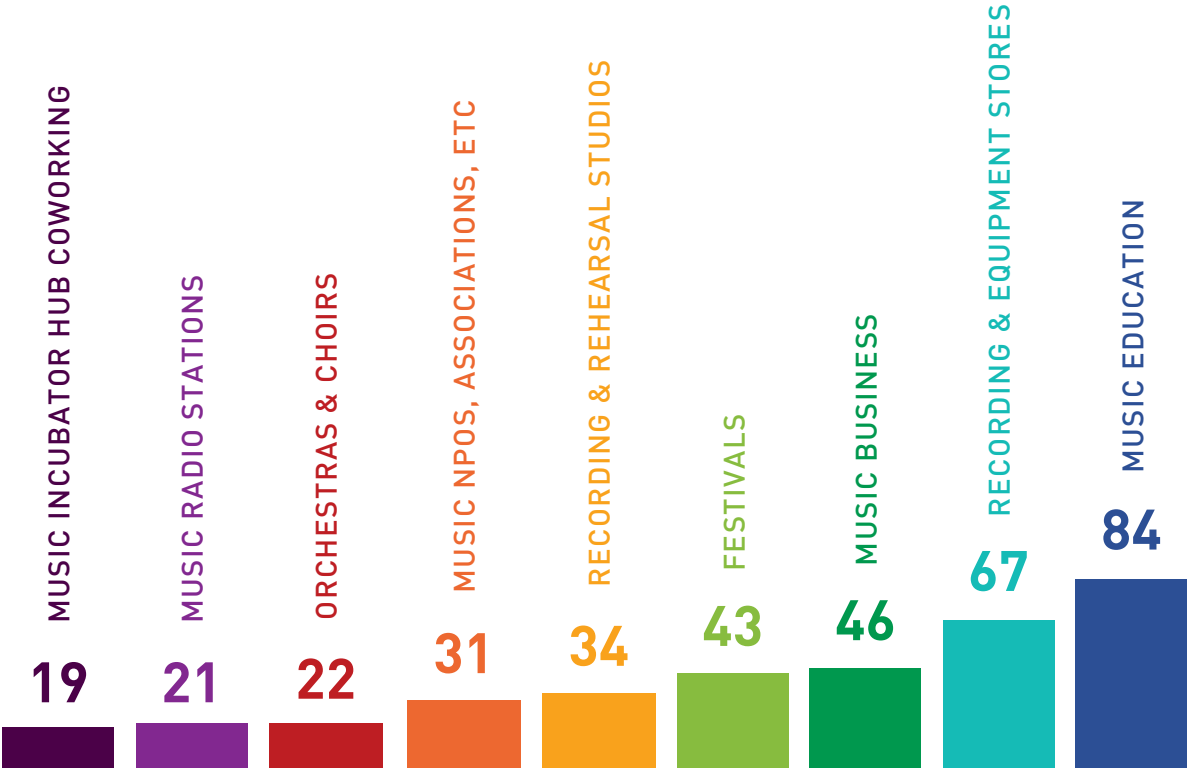
The goal of Music Asset Mapping is to chart the amount and concentration of various music resources in the Greater St. Louis MSA (MO-IL). These resources include venues, music education, recording and equipment stores, music businesses, festivals, recording and rehearsal studios, music nonprofit organizations and associations, orchestras and choirs.

Data for the mapping was selected and provided by the Regional Arts Commission of St Louis, and the Kranzberg Arts Foundation, along with citizen input. It was georeferenced with our proprietary mapping tool and the music assets were cross-referenced with the counties in Greater St. Louis (MO-IL).



Image © Phillip Hamer

DISTRIBUTION OF MUSIC ASSETS IN GREATER ST. LOUIS (MO-IL)



Development by Sound Diplomacy

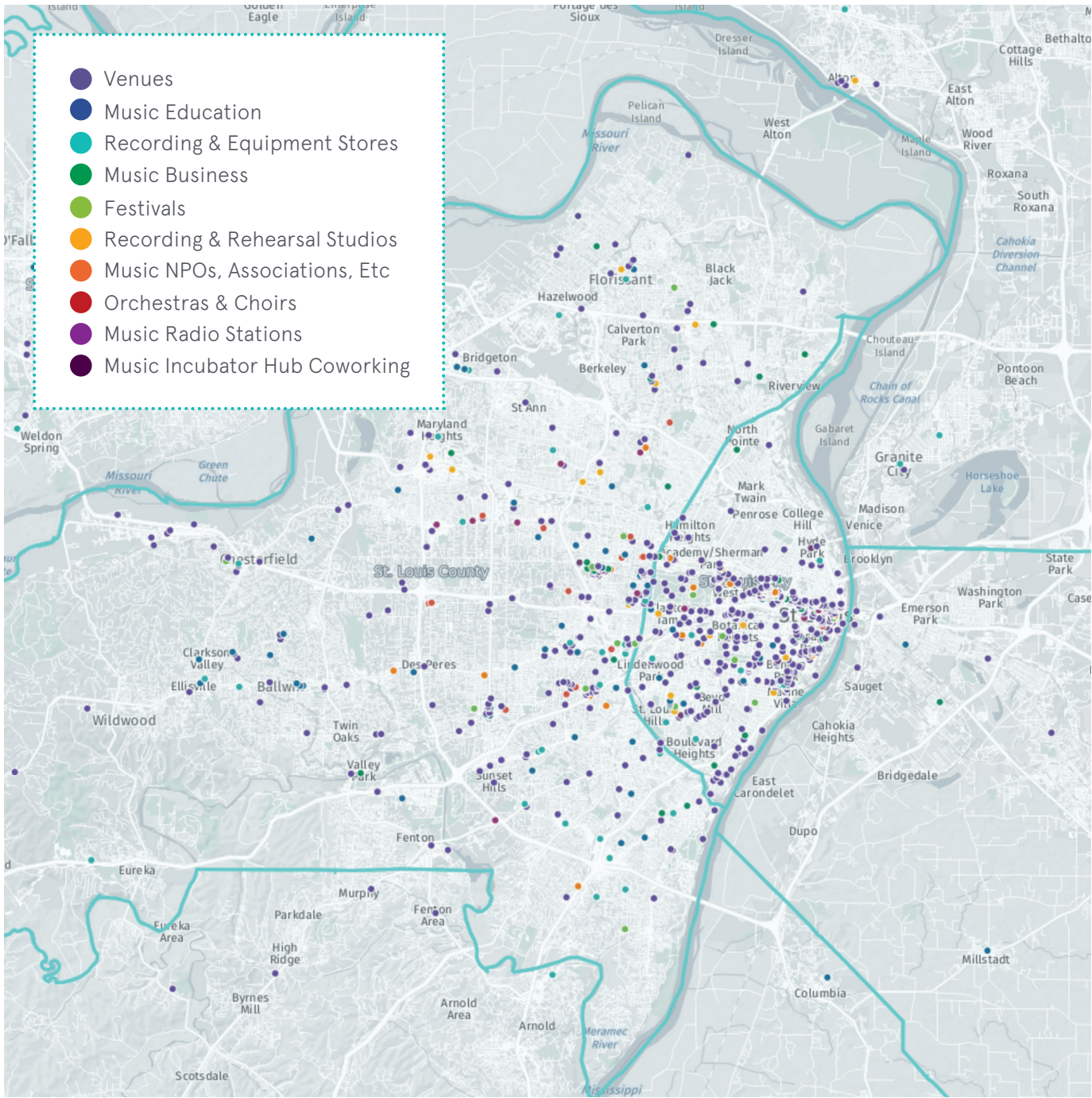
The geographical area in scope is **Greater St. Louis (MO-IL)**. The geographical area includes counties from the state of Illinois (Bond, Clinton, Calhoun, Jersey, Macoupin, Madison, Monroe and St. Clair) and Missouri (Franklin, Jefferson, Lincoln, St. Charles, St. Louis (excluding the city of St. Louis), St. Louis (city) and Warren).

The mapping identified **1,144 music-related assets** – viewable [in the interactive map](#). Of the total number of assets, **598 (52.3%)** are located in the **City of St. Louis**, **408 (35.7%)** are located in **St. Louis County** and the remaining **138 (12%)** are spread across **other counties within Greater St. Louis (MO-IL)**. The highest number of observations is seen in the category of **Venues with 777 (67.9%)** assets mapped. The second category with the most presence is **Music Education** with **84 (7.3%)** assets.

777  
VENUES



# SPATIAL DISTRIBUTION OF MUSIC ASSETS GREATER ST. LOUIS (MO-IL)



Source: Sound Diplomacy

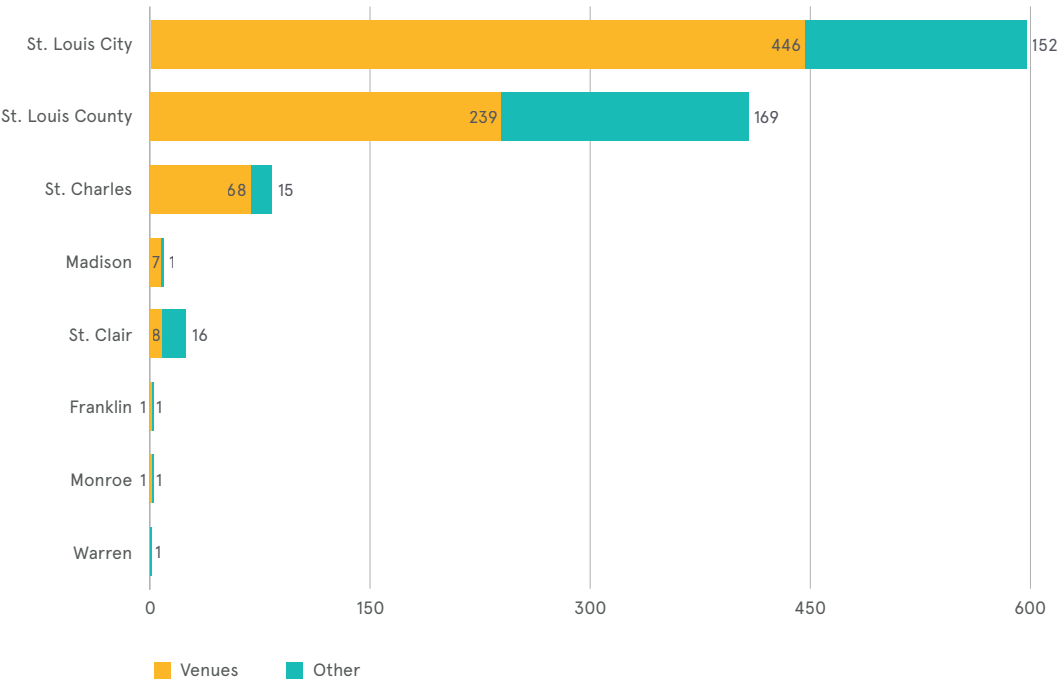
## GEOGRAPHICAL CLUSTERS

In general terms, there is one main cluster of assets within Greater St. Louis. It is located in the **City of St. Louis** and **St. Louis County** with more than **800 assets**, representing **69.9%** of the mapped assets. Additionally, there is one isolated cluster of assets in **St. Charles**, with an agglomeration of more than **39 assets (3.4%)**.



Within the **City of St. Louis**, the majority of its assets are **Venues 446 (75%)**. Whilst **St. Louis County** has a more even distribution between **Venues 239 (59%)** and other music categories **169 (41%)**, **Madison** and **St. Clair** counties have a higher proportion of asset categories other than Venues. The non-venue asset categories represent **70%** of the assets in **Madison (16 assets)** and **63%** in the case of **St. Clair (12 assets)**.

FIGURE 2. DISTRIBUTION OF MUSIC ASSETS BY COUNTY IN GREATER ST. LOUIS (MO-IL)



Developed by Sound Diplomacy



# 4. MUSIC ECOSYSTEM SURVEY



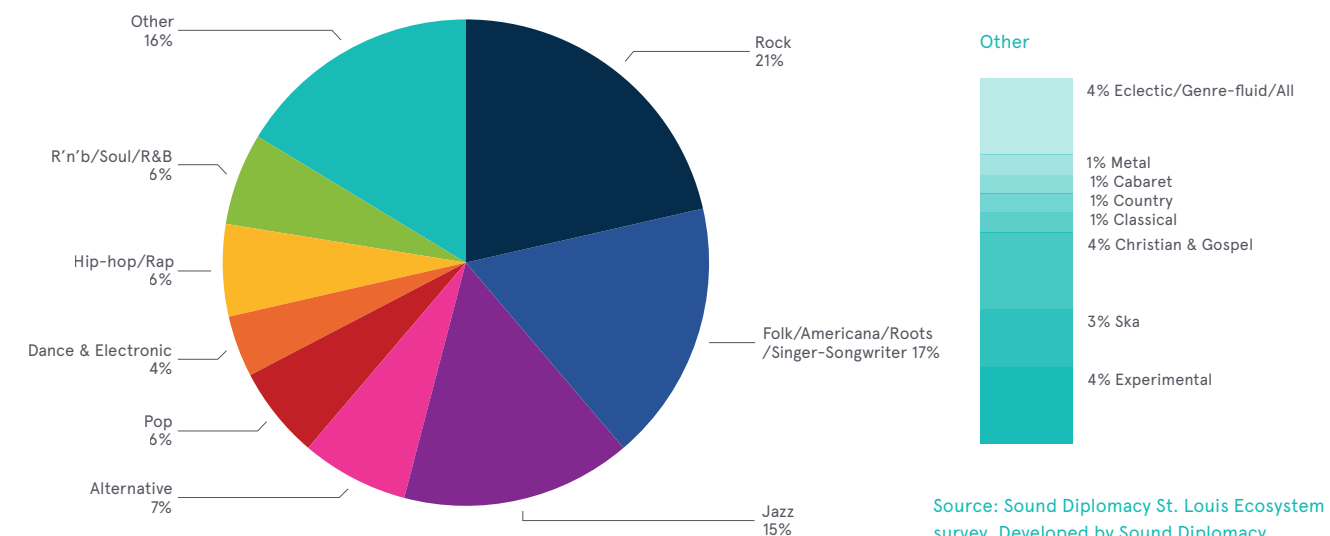
Image © Philip Hamer

The survey focused mostly on stakeholders from the City of St. Louis, however, there was an option for those based outside of it who participate in the music industry there to respond.

## CREATIVE & ARTIST SEGMENT

- **Semi-professional Creative & Artist segment.** Those surveyed are primarily semi-professional (63%), meaning they earn money from music (26.3% of their total annual gross income) but it is not their main income. 27% of survey participants are professional and the remaining 10% are amateur.
- **There is a lack of a high level of professionalization in this segment.** Examples highlighted include a gap between the standard quality of recording studios' and the requirements of professional creatives & artists, low articulation with other agents in the music value chain, a low percentage of them receiving income derived from recorded music (39%), and local creatives & artists still depending on jobs outside the music industry (30%).
- **Music-related activities are not profitable enough to allow the hire of or interaction with agents in the music ecosystem/ value chain that have business expertise.** 65% do not work with record labels, booking agents, managers, etc. Whilst the majority recognize a gap in knowledge in marketing (65%), social media (54%), music technology (52%), copyright (48%), and legal (44%), they are not able to hire these providers.
- **Since COVID-19 (2020) there is a decrease in time dedicated to music activities and music-related income.** For 38%, the time dedicated to music has decreased since the onset of COVID-19 (2020) and there's been a 21.4% decrease in income connected to music.
- **Live performance remains the main source of income for creatives & artists, hence there is still a need to develop monetization mechanisms for recorded music.** 42% have not tried to gain any additional music-related income since the onset of COVID-19 (2020). Moreover, 76% believe that music streaming has not helped to supplement their revenue loss.
- **Few grants and government funding applicants.** Despite the impact on their income since COVID-19 (2020), only 17% of the surveyed artists and creatives applied and received funding from grants.

FIGURE 3. MAIN MUSIC GENRE OF THE CREATIVE AND ARTIST SEGMENT<sup>51</sup>

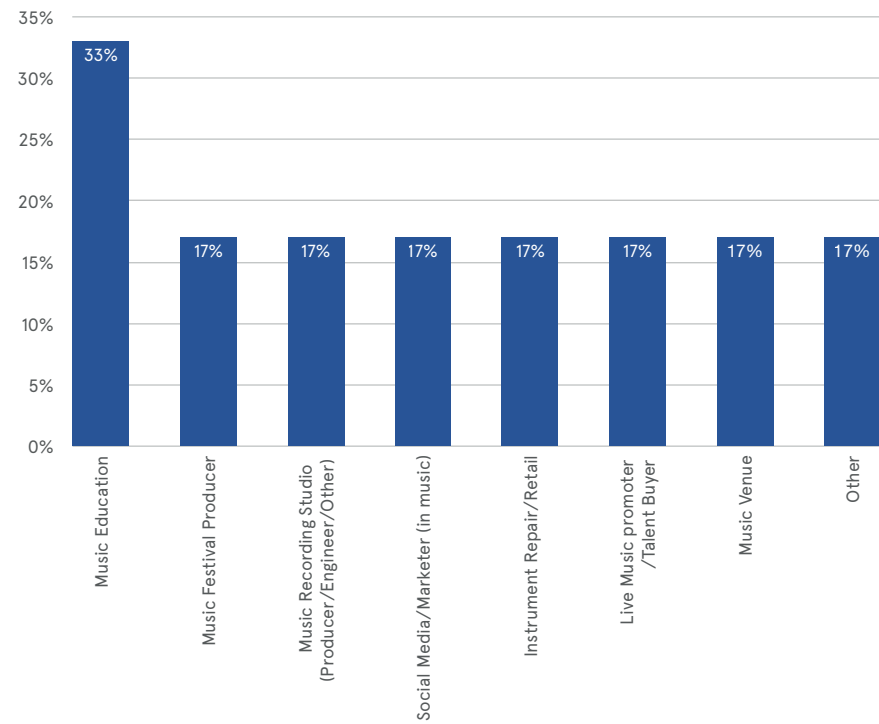




PROFESSIONAL & SUPPORT SEGMENT: BUSINESSES

- **Music activities/industry account for the majority of businesses’ income with no need to diversify into other economic sectors.** Both prior to COVID-19 (2019) and since the onset of COVID-19 (2020), more than 75% of the businesses’ revenue was generated by music-related activities.
- **Since COVID-19 (2020) there has been a decrease in revenue for businesses.** On average, the annual decrease was 9.2% of their revenue.
- **67% plan to rely on grants and funding to recover financial loss from COVID-19.** 50% plan to utilize digital media options such as streaming. Yet, since COVID-19 (2020), only 33% applied for and received grants/funding. This demonstrates the lack of self-sustainability in the sector, where businesses believe that they require non-market mechanisms to support their revenue loss.

FIGURE 4. TYPE OF ACTIVITY IN THE PROFESSIONAL AND SUPPORT SEGMENT



Source: Sound Diplomacy St. Louis Ecosystem survey. Developed by Sound Diplomacy

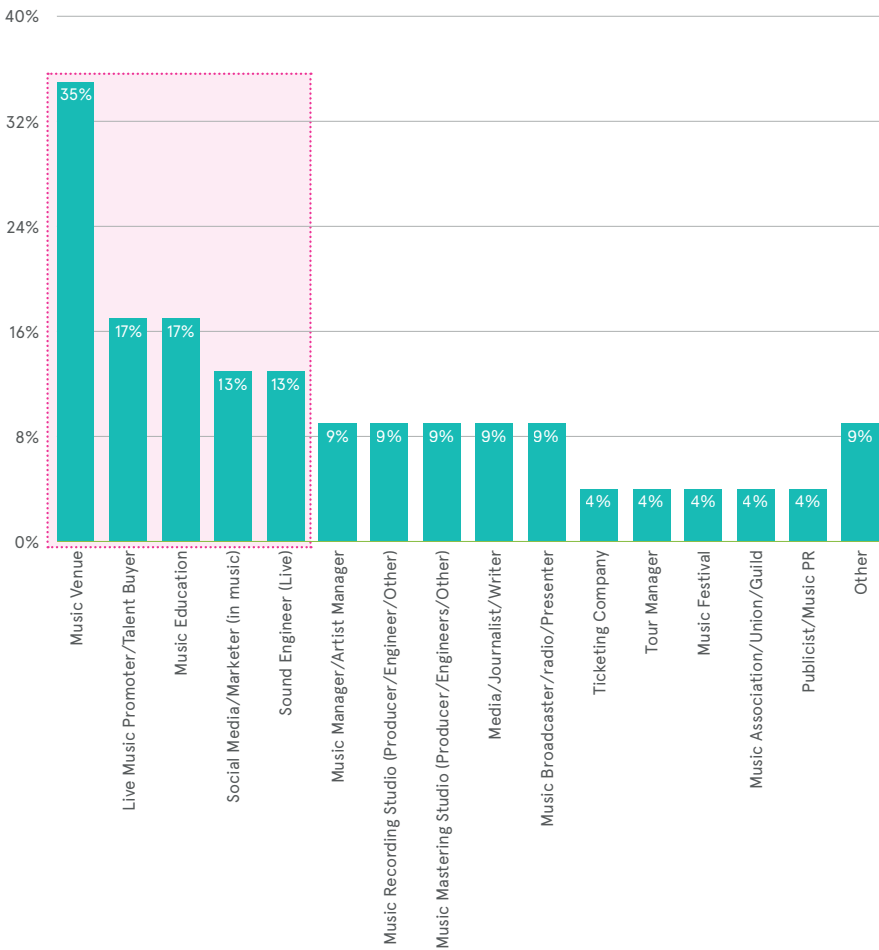


Image © Tre Parmalee

PROFESSIONAL & SUPPORT SEGMENT: WORKERS

- **There is a high number of workers in live performance activities.** The three main sub-sectors for workers are connected to music venues (35%), live music promotion or talent buying (17%), and sound engineering for live performances (13%). The other two top areas are music education (17%), and social media and marketing in music (13%),
- **The skills and competencies lacking are similar to those in the Creative & Artistic segment.** The main skills are in marketing (52%), business & financial management (43%), technology (43%), and social media (39%).
- **Overall, workers were negatively affected by COVID-19, which generated an estimated loss of revenue of 28.1%.** Higher than the one by the Creative & Artistic segment (21.4%).
- **The loss of contracts with local clients has been more noticeable.** Before COVID-19 (2019), on average 54.7% of clients were from St. Louis, however, since COVID-19 (2020) this reduced to 45.7%.
- **Since COVID-19 (2020), only 25% have relied on the use of digital technologies to improve collaboration, co-creation and innovation in the production process, but there is a high dependency on the live music scene.** For 30%, digital technologies helped to enable communication with clients and suppliers. However, 43% saw no benefits.
- **75% had not received any grants or government support,** similar to what occurred prior to COVID-19 (2019), where 80% did not apply for such support.

FIGURE 5. TYPE OF ACTIVITY IN PROFESSIONAL AND SUPPORT SEGMENT WORKERS



Source: Sound Diplomacy St. Louis Ecosystem survey. Developed by Sound Diplomacy



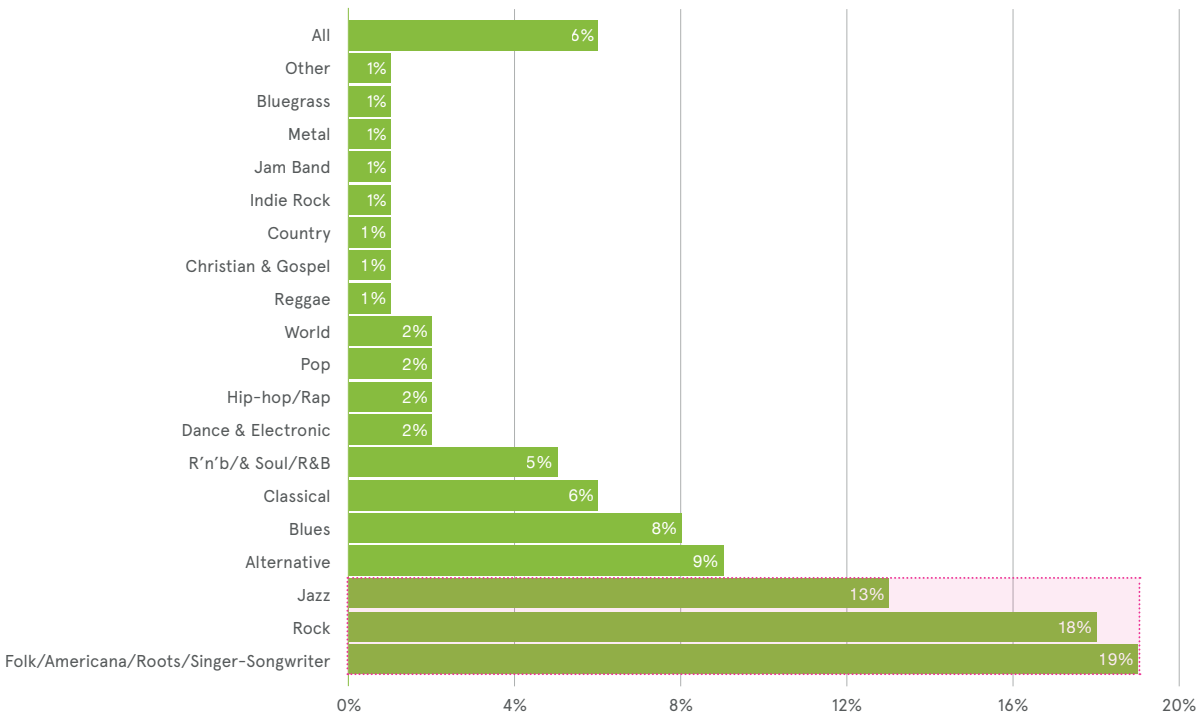
MUSIC AUDIENCE

- **Music audiences are older in St. Louis.** Most of the surveyed audiences are from an older segment of the population; the majority (57%) are above 50 years of age.
- **Diverse music genre preferences match the local supply.** The top three music genres are folk/Americana/roots/singer-songwriter (19%), rock (18%), and jazz (13%). The three genres are also among the top genres offered by local creatives & artists.
- **Digital tools help audiences to reach local artists.** Prior to COVID-19 (2019) 68% actively followed a local artist on social media, 64% paid entrance to a local artist’s show, and 54% listened to a local artist on the radio. Since the onset of COVID-19 (2020), 40% increased engagement by following a local artist on social media, 35% streamed music and videos from a local artist for free, and 30% increased by watching a live stream of a local artist.
- **There is an opportunity to attract new audiences.** Lack of time (39%), high ticket prices (37%), and difficulty finding information about what events were taking place (31%) were the most common reasons not to attend events.
- **There is a sufficient supply of local venues that satisfy the local demand.** 54% often visit venues within the city

to see all types of acts (local renowned, local emerging, US renowned, US emerging, international renowned acts, and international emerging acts). On average, 11% of the audiences visit venues in the Greater St. Louis region but outside of the City of St. Louis. Only 3% visit venues outside the region.

- **68% rely on Facebook as the main platform to find out about music events,** followed by 61% relying on word of mouth. Traditional media such as radio and newspapers are used by 58% and 34% of surveyed audiences. It’s worth noting that the surveyed audiences belong to an older age segment.

FIGURE 6. MUSIC AUDIENCE PREFERRED MUSIC GENRES

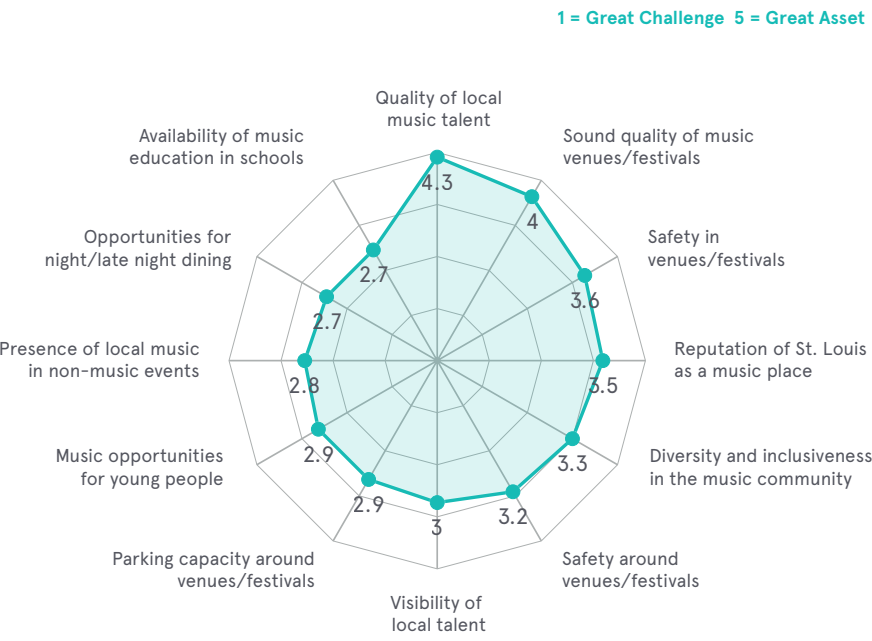


Source: Sound Diplomacy St. Louis Ecosystem survey. Developed by Sound Diplomacy

GOVERNANCE AND PROFESSIONAL OPINION OF ST. LOUIS MUSIC ECOSYSTEM

- **The music ecosystem in St. Louis is negatively affected by certain regulations, mainly noise ordinance policies.** 54% do not perceive negative impacts from the local regulations and policies, but 30% noted problems with noise regulations (30%) and 25% parking availability near venues.
- **56% want to see more grants to support artists and music organizations.** 82% have never received any grant, 32% of which said it’s due to the fact that they are unaware of what is available to their professional category.
- **53% want increased public advocacy for music,** 46% want access to public spaces for music events, 38% more tax incentives to support music artists and related businesses, and increased support with promotion and media presence, and 37% want more affordable spaces to live, work and rehearse.
- **Music audiences say the local talent and sound quality of music are the greatest assets in the music scene, but a more cohesive value chain could improve the artists to more effectively reach the demand.** The quality of local music talent was rated 4.3/5, followed by the sound quality of music venues/festivals (rate of 4.0/5). However, the visibility of local talent (rated 3.0/5) requires improvement to enable local talent to strive.

FIGURE 7. CHALLENGES OF THE LOCAL MUSIC ECOSYSTEM ACCORDING TO LOCAL MUSIC AUDIENCES



Source: Sound Diplomacy St. Louis Ecosystem survey. Developed by Sound Diplomacy



Image © Martell Stepney



# 5. MUSIC ECOSYSTEM ECONOMIC IMPACT



Image © Martell Stepney

## ST. LOUIS ECONOMIC IMPACT OVERVIEW

The two segments of the Greater St. Louis (MO-IL) music ecosystem – **Creative & Artistic** and **Professional & Supporting** – delivered a total economic impact of 28,135 jobs, a total output of \$2,121 million, a total gross value added (GVA) of \$1,310 million and a total workers compensation of \$970 million.

The total employment created and supported by St. Louis’ (MO-IL) music ecosystem generates 2.0% of the area’s employment, a figure that is above that of New York City (1.4%) and also above the average contribution of the music ecosystem registered at the national level (1.3%).

The music ecosystem has a multiplier effect on the Greater St. Louis (MO-IL) economy. For every \$1,000 of output produced by the music ecosystems, the rest of the economy benefits by generating an additional output of \$849, derived from indirect and induced effects.



Image © Phillip Hamer

TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	OUTPUT (MILLION \$)	GROSS VALUE ADDED (MILLION \$)	EARNINGS OR COMPENSATION (MILLION \$)	AVERAGE COMPENSATION (\$)
Direct	17,876	1,147	685	515	28,805
Indirect	3,845	461	298	219	56,861
Induced	6,414	512	326	236	36,833
Total Impact*	28,135	2,121	1,310	970	34,469

\* Results in the row Total Impact are the rounded results of the direct, indirect and induced impacts.



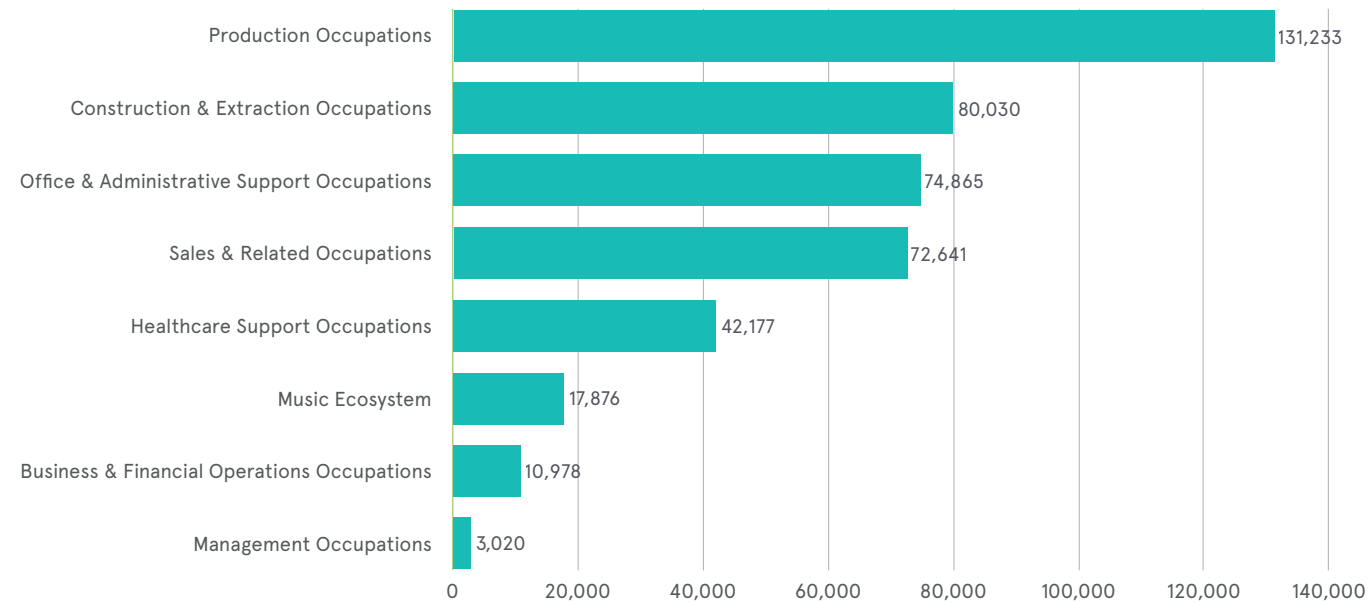
## DIRECT IMPACT<sup>56</sup>

The direct economic impact of the music ecosystem generated 17,876 direct jobs, \$515 million in earnings, an estimated GVA of \$685 million, and \$1,147 million in economic direct output in 2019.

To put the level of **direct employment** into perspective, the direct employment generated by the music ecosystem in 2019 (17,876 jobs) represented 1.27% of the workforce in Greater St. Louis (MO-IL), whereas traditional sectors such as **Production Occupations** or **Construction & Extraction Occupations** supported 9.33% and 5.69%, respectively. Meanwhile, industries like **Business & Financial Operations** and **Management** supported 0.78% and 0.21% respectively (see the below figure).

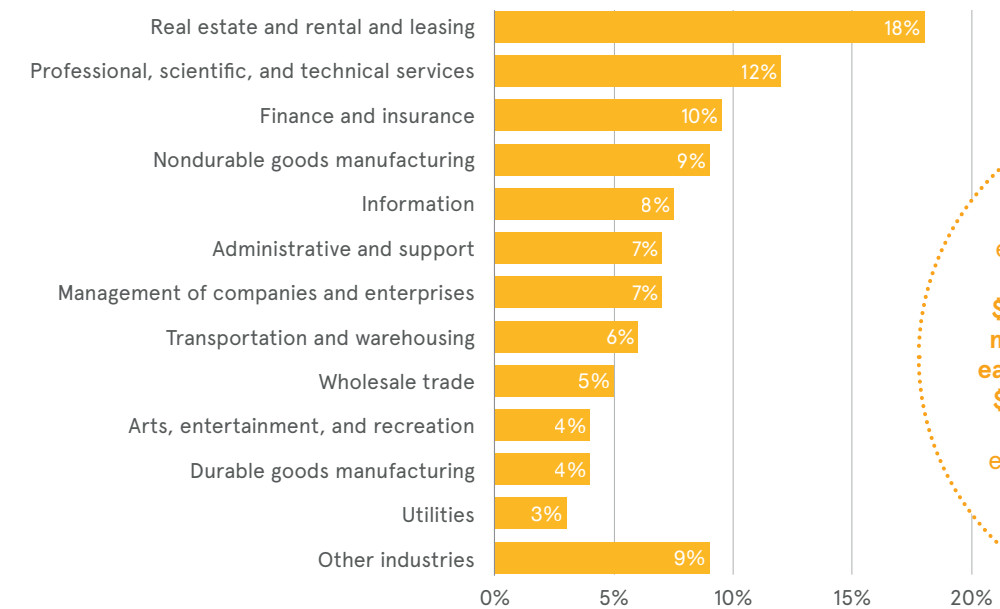


## EMPLOYEES BY INDUSTRY, 2017



Source: County Business Patterns 2018, BEA RIMS II, Sound Diplomacy Research

## INDIRECT IMPACT OUTPUT BREAKDOWN, 2019



Source: County Business Patterns 2019, BEA RIMS II, Sound Diplomacy Research

## INDIRECT IMPACT<sup>60</sup>

The indirect economic impact of the music ecosystem in Greater St. Louis (MO-IL) reached an output of \$461 million and a GVA of \$298 million. The sum of the **indirect earnings (compensation)** reached \$219 million. At the same time, it is estimated that the music ecosystem indirectly supported 3,845 indirect jobs in Greater St. Louis (MO-IL) in 2019.

To give an idea of the size of the indirect effect of the music sector on the local economy, it was estimated that \$1,000 of output from the **music sector** is indirectly supporting \$402 of the output of **other industries** in the city.

## INDUCED IMPACT<sup>62</sup>

The **induced output** of the music ecosystem in the region reached \$512 million, a GVA of \$326 million in 2019, and supported 6,414 jobs, with a compensation of \$236 million. The data shows that \$1,000 of the music ecosystem output is generating an induced effect of \$447 on different industries of the economy.



The graph above displays the **output breakdowns of the industries impacted indirectly by the music ecosystem**. It was estimated that 18% (\$84.1 million) of the indirect output effect of the Greater St. Louis' (MO-IL) music ecosystem impacted the Real Estate and rental and leasing sector, 12% (\$53.57 million) impacted the Professional, scientific and technical services sector, 9% (\$43.71 million) impacted Finance and insurance and 4% (\$18.89 million) impacted the Arts, entertainment and recreation sector.



## 6. SWOT ANALYSIS



Image © Nick Garcia

The below SWOT captures findings from all research and stakeholder engagement. The findings are based on perceptions and beliefs from the Greater St. Louis music community as well as qualitative and quantitative data from the Sound Diplomacy team.

### STRENGTHS

- Roundtable participants believe that **St. Louis has a unique genre history, a rich cultural and musical heritage, particularly African-American music heritage**, and has hosted many architects of music such as Miles Davis, Chuck Berry, and David Sanborn
- Survey respondents perceive that the **local talent and sound quality of music** are St. Louis' greatest assets in the music scene
- Survey respondents believe that there is a **large presence of live music** in relation to the city's size
- Sound Diplomacy's regulatory assessment showed that the RAC runs **four grants for cultural organizations and individual artists**, and also **provides cultural and arts resources, training programs, and arts fellowships**
- Sound Diplomacy's regulatory assessment showed that the St. Louis Economic Development Partnership (SLEDP) provides **business development incentives, programs, resources and strategies**
- Sound Diplomacy's regulatory assessment showed that St. **Louis Street Performers United's practice guide** is useful to inform street performers of their rights, performance guidelines, recommended performance areas, and suggestions for audience interaction
- Sound Diplomacy's regulatory assessment showed that the **City of St. Louis Sustainability Plan** was adopted in January 2013 and has seven Arts, Culture and Innovation objectives each with their own strategies
- Sound Diplomacy's regulatory assessment showed that St. Louis launched **The Downtown Engagement and Public Safety Initiative in 2021** in response to the increase in violent crime downtown to help protect the nighttime economy
- Roundtable participants established that **funding exists on the individual level** through the Arts Council via the Hotel Tax
- Sound Diplomacy's regulatory assessment showed that there is **support for the creative industries through private foundations**, such as the Kranzberg Arts Foundation
- Sound Diplomacy's regulatory assessment also showed that the **Missouri State Arts Council** has helped to **provide grants and funding for the music industry**, that the industry in St. Louis is eligible for.

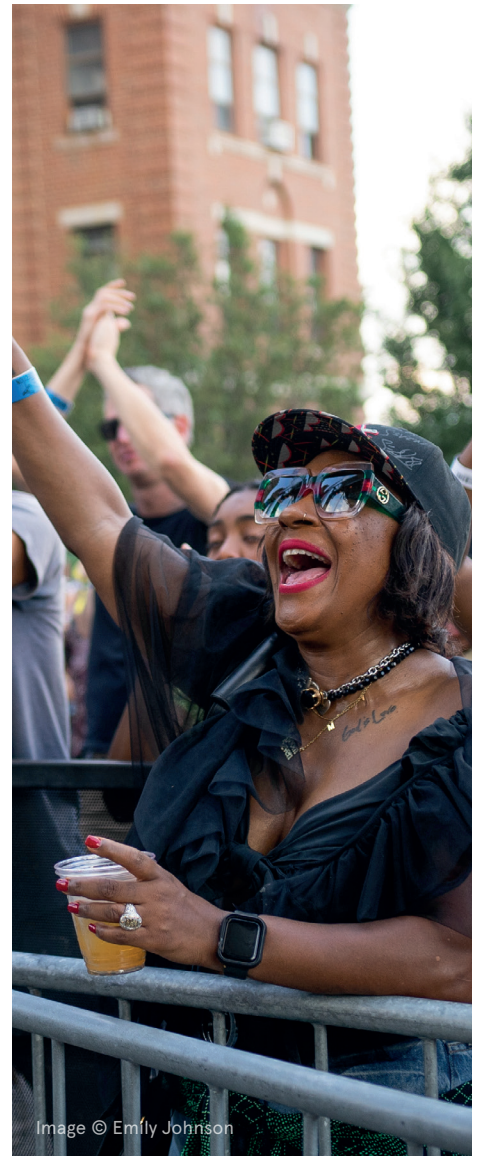


Image © Emily Johnson



# WEAKNESSES

- Roundtable participants believe that **St. Louis’ modern genres appear to be under a shadow of the region’s music history that prioritizes Jazz and Classical Music**. There is a perception from stakeholder conversations that there is a **lack of diversity** in prioritizing genres in marketing, tourism, and education and the music community feels siloed between genres (segregated by venue, neighborhood or race)
- Roundtable participants believe that the **music history** of St. Louis is **not incorporated into the built environment**
- Desk research and stakeholder conversations revealed **limited music education, with a lack of formal comprehensive music education in public schools or public arts programs**, limited genre focus in universities, concentrating more on Jazz and Classical training, and no obvious, established pipelines to aid aspiring musicians and music industry workers to transition into viable careers
- **Problems with financially sustaining careers** were named by surveyed creatives and artists, with high levels of semi-professionals, low levels of professionalization, requirements to learn multiple skills to survive financially which takes them away from creative projects, since COVID-19 there has been a decrease in time dedication to music activities, a lack of monetization for bookings feeds into less interest from venues to build up the local music scene, and issues getting fair compensation in comparison to the value they bring to the venues
- The economic impact assessment identified an **income gap connected to gender and race**, white male workers earn more than the female workforce or workers from non-white races
- Surveyed creatives and artists shared their experiences that suggest **music-related activities are not profitable enough for them to be able to hire or interact with the agents** in the music ecosystem that have business expertise
- Roundtable participants revealed that **options to gain grants to support artists and music organizations from the city are limited**; stakeholders feel uninformed about the ones that do exist
- The survey analysis revealed **gaps of professional roles such as publishing agents and entertainment lawyers** – interviewed stakeholders state that artists are forced to leave St. Louis to pursue this kind of support
- Efforts to offer **professional development or other resources for musicians were not found to be well-promoted** and stakeholders felt can sometimes be exclusionary due to genre-specific boundaries
- Research and stakeholder conversations highlight **a lack of resources for the music industry** – a comprehensive music calendar, a city-wide music tourism strategy, a Music Office, an Agent of Change policy to protect music venues from new developments, music-friendly noise ordinance policies, musician loading zones, or 24-hour public transit system
- Stakeholders asserted that **outdated permit processes for music events** in the city creates the perception that the potential of music is misunderstood by local leadership
- Engaged stakeholders believe **large businesses and venues (such as arenas) are prioritized by the City** in promotional and marketing material, overshadowing small businesses in the music ecosystem
- **Audience and musician safety is a concern** raised by stakeholders who say that security is privately contracted and lacks city-sponsored safety precautions and officers; there is **no police street safety plan**; there is a perception that **St. Louis is an unsafe place to visit**, which some interviewees believe is hurting the music and tourism brand; and parking lots are unattended and unregulated, so patrons have concerns about being able to park safely, and musicians about keeping their instruments in their cars
- The mapping and stakeholder conversations raised **concerns around spaces for performance and creation, with no work hubs for musicians to connect, collaborate and create in**, limited rehearsal spaces, gaps in venue sizes and diversity of venue types, and a lack of minority-owned venues.

# OPPORTUNITIES

- The **MetroBus and MetroLink “Board & Explore St. Louis” initiative with a \$5 day pass is ideal for events** (a summer long campaign in 2021). Metro St. Louis also provides a list of local events with a description and the bus routes to take
- Do314 has a calendar of events in St. Louis, and other cities. They also send out emails about things to do. **Do314 can help visitors navigate and find music assets**
- The **St. Louis CVB has a website about music**
- The **Cortex Innovation Community** business, innovation and technology hub once completed will have 4.5 million square feet of mixed-use buildings
- The **St. Louis Smart City pilot project** by the Department of Homeland Security’s Science and Technology Directorate to test the integration of smart cities technology in St. Louis
- Stakeholders stated that St. Louis has a lot of **under-utilized space that could be repurposed efficiently for music**
- Lower barriers to entry such as **low cost of living, low property costs** and virtual infrastructure **make St. Louis appealing for artists** in neighboring areas and regions.

# THREATS

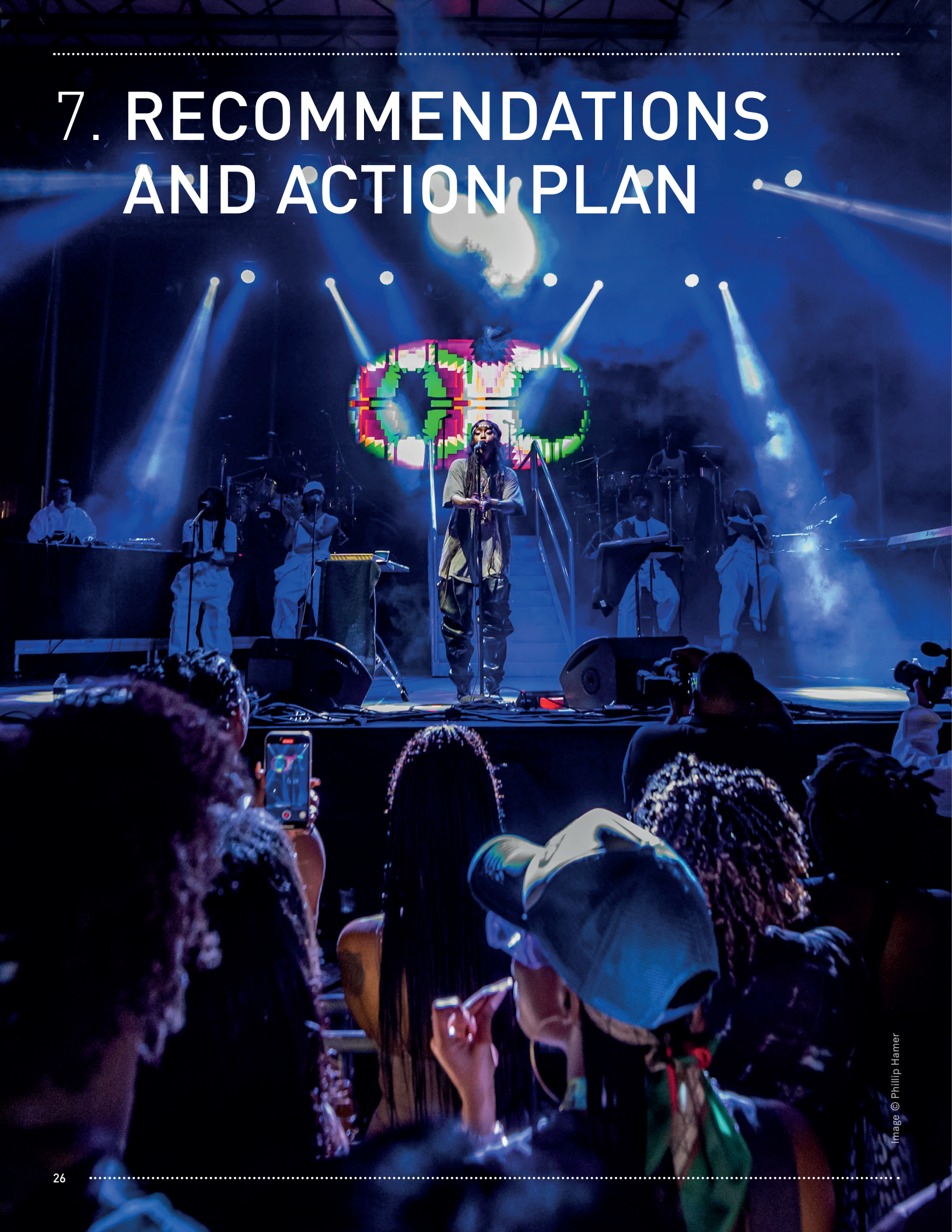
- The visual arts have more support and prominence while interviewed and surveyed stakeholders feel that **music gets overlooked**
- There is a perception amongst engaged stakeholders that St. Louis’ reputation as a “sports town” means the **music industry gets outshined by the sports industry**
- Kansas City has more modern event permitting infrastructure, which is all online and can be done without going to city hall, in comparison to St. Louis. **This has the potential to lose music talent from St. Louis to Kansas City’s more developed and supportive infrastructure**
- **Proximity to large markets like Nashville, Indianapolis, and Memphis** was stated by stakeholders to cause competition for audiences and artists.



Image © Martell Stepney



# 7. RECOMMENDATIONS AND ACTION PLAN



# 7. RECOMMENDATIONS AND ACTION PLAN

The action plan outlined below will help define St. Louis as a global music city.

This will be achieved through the following objectives:

- View and recognize arts sectors and the music ecosystem as valuable assets to the region’s economy
- Enhance professional development and employment opportunities for local artists and music professionals
- Track the progress of the music sector in order to see which initiatives are working and what needs improvement
- Create a music-friendly environment and attract new music businesses (and connected industries) as a result of greater policy support for the sector
- Build relationships and recognition between local businesses, musicians, and the region
- Increase the perception of safety throughout the region
- Create more equitable work conditions for music artists and professionals, which contributes to the economic viability of the region
- Attract broad demographics of people in the region through increased diversification of workers and employment opportunities, as well as expanded programming and events.

- ZONING AND PLANNING
- LICENSING AND REGULATIONS
- HEALTH AND SAFETY
- ECONOMIC DEVELOPMENT
- MUSIC EDUCATION
- CITY POSITIONING AND MUSIC TOURISM

0-12 MONTHS

1-2 YEARS

3+ YEARS

RECOMMENDATION #1  
Establish a Music Office

RECOMMENDATION #2  
Establish Loading Zones

RECOMMENDATION #3  
Implement an Agent of Change Policy

RECOMMENDATION #4  
Extend and Improve Reliability of Public Transportation

RECOMMENDATION #5  
Revise and Specify Noise Ordinances

RECOMMENDATION #6  
Create a One Stop Shop for Licenses and Permitting



0-12 MONTHS

1-2 YEARS

3+ YEARS

**RECOMMENDATION #7**

Create an Official Street Closure Policy

**RECOMMENDATION #8**

Create Unified Safety Protocols and Guidance for Music Venues Owners and Workers

**RECOMMENDATION #9**

Expand Public Safety Initiatives By Including Music Venues

**RECOMMENDATION #10**

Incorporate the Arts into Economic Development Plans

**RECOMMENDATION #11**

Create a Fair Pay Policy and Guide for Musicians

**RECOMMENDATION #12**

Develop Incentives for Music and Entertainment Businesses

**RECOMMENDATION #13**

Create Training Programs and Incentives to Make Music Leadership More Inclusive of Minoritized Populations

**RECOMMENDATION #14**

Develop an Initiative to Activate Vacant Spaces in Neighborhoods with Marginalized Demographics

**RECOMMENDATION #15**

Raise Awareness of Existing Grant and Fellowship Programs

**RECOMMENDATION #16**

Begin a City-Wide Music Education Initiative

**RECOMMENDATION #17**

Expand Professional Development Training and Education Opportunities for Music Businesses and Other Related Skills

**RECOMMENDATION #18**

Create a Music Tourism and Marketing Strategy

**RECOMMENDATION #19**

Incorporate Audience Development into Cultural Arts Planning

# 8. CONCLUSION





# 8. CONCLUSION

St. Louis region has everything it needs to create a thriving music ecosystem, from music heritage brimming with stylistic innovations in genres like the blues and country, to its many community associations and advocates that exist to support the arts sector.

Educational opportunities abound and entertainment districts like the Grand Center integrate the City, and Region’s musical history with venues and activities that appeal to a broad demographic. In order to take this to the next level, intentional connections between the community, local government, and music-related businesses and organizations need to be fostered, both city-wide and regionally, which will lead to music-specific regulatory accommodations and more professional opportunities for a multitude of careers, including those which are non-performance related, that ultimately strengthen the music ecosystem.

However, there are barriers to success that are currently inhibiting growth and progress. Licensing and permitting processes are not the most efficient and do not cater to the music industry in ways that would welcome more music businesses and performers. The current music community is largely unaware of the grants that exist from the Regional Arts Commission, nor are they involved in organizations like the Musicians Association of St. Louis, the St. Louis Area Music Teachers Association, or Make Music St. Louis which advocate on their behalf. COVID-19 has had a negative impact on the music industry with many venues seeing a decrease in attendance and music workers suffering lost wages and contract opportunities; many of these same participants did not

apply for available governmental support due to a lack of support or knowledge about the process. In order for St. Louis and the surrounding region to reach its potential, the music ecosystem must be supported in both tangible and recognizable ways. While stakeholders refer to the music industry as a “do it yourself” environment, there are specific contributions that St. Louis could make to change this reputation and reveal the city and Greater St. Louis to be the bastion of cultural output and community that it is destined to be. Through cross-sectoral collaborations, regulatory improvements, and community outreach and support, St. Louis and its region can become a premier destination for music businesses, artists, and consumers.



# ACKNOWLEDGEMENTS

Sound Diplomacy would like to thank every individual who worked with us, took an interest in the report, responded to the survey, attended a roundtable, and shared information. Your participation and input have been invaluable and the work could not have been done without it.

## SOUND DIPLOMACY



Sound Diplomacy is a global research and strategy consultancy committed to building and supporting sustainable ecosystems that bring economic development to people, places and cities. They provide research and recommendations to businesses and policymakers to help them make informed decisions on the best use of places and how to stimulate economic, social and cultural growth. Sound Diplomacy’s team of economists, analysts, researchers and consultants are based across the UK, Europe, North America and Latin America and have delivered results across six continents, in over 100 cities and 25 countries. For more information, please visit [www.sounddiplomacy.com](http://www.sounddiplomacy.com)

## REGIONAL ARTS COMMISSION



REGIONAL ARTS COMMISSION OF ST. LOUIS

As the leading public catalyst for arts and culture in St. Louis, the **Regional Arts Commission** leverages the power of creativity to strengthen and enrich the community. The Regional Arts Commission envisions a region where every resident has the freedom, resources, and opportunities to enjoy a creative life – to share and celebrate their stories, art, and culture and feel a sense of belonging wherever they live, work, or play.

## KRANZBERG ARTS FOUNDATION



Established in 2006 by Ken and Nancy Kranzberg, the **Kranzberg Arts Foundation** is a non-profit organization dedicated to promote arts and culture in St. Louis through the development and operation of spaces and venues such as The Kranzberg, .ZACK, The Marcelle, The Grandel, The Big Top, and High Low. The foundation provides essential infrastructure for professionals in the sector and currently serves and supports “over 150 local arts organizations, visual artists, musicians, writers and filmmakers”. The Kranzberg Arts Foundation has also had a crucial role in the development of the Music at the Intersection Festival, the Wednesday Night Jazz Crawl, and the St. Louis Art Place Initiative.



FOOTNOTES

1 This applies to all methods of evening travel from public transportation to rideshare services and the general walkability of spaces where there is a high concentration of live music venues and businesses. Ease of travel plays a large role in whether or not people are willing to engage with the music ecosystem, especially given the proportion of music events that occur in the evening, therefore it is important to review night transport.

2 OneSTL (2013)

3 Capital Metropolitan Transportation Authority (2022)

4 The Agent of Change policy is a framework that protects current music venues from the complaints and threats that come with new, nearby developments. The Policy holds that the entity that creates the change responsible for mitigating its impact. For example: if a residential development is built next to a music venue, it is the responsibility of the new development to put any necessary sound attenuation measures in place.

5 Music Law Updates (2015)

6 A Music Office situated within city government has the potential to bridge the gap between public and private sectors as well as coordinate opportunities and resources for those involved in the music ecosystem. Most cities do not have a Music Office or equivalent, but we still find it important to see whether or not an entity is acting in this capacity.

7 Regional Arts and Culture Commission (2022)

8 Visit Austin (2022)

9 City of Austin (2022a)

10 City of Austin (2022b)

11 The availability of grants specifically geared towards music artists, professionals, businesses, and organizations is a good indicator of existing support for the local music ecosystem. We assess the quality of the financial resources based on availability, breadth, amount, and requirements.

12 Arts and Venues Denver (n.d)

13 Music curfews, or the lack thereof, indicates regulatory support for the music sector. Often related to live music venues and events, music curfews show the feasibility of owning and operating a profitable music business in a given area. Strict curfews, or unclear ones, can pose an issue for the music ecosystem.

14 City of St. Louis (2008)

15 Billboard.com (2017)

16 Event permitting is important for our assessment, since many businesses and organizations host music events that require them to navigate the permitting process. A more streamlined approach, which is accessible online, is preferable in these scenarios. We check for accessibility of information and readability, whether or not processes can be fully completed online, and how many departments have to be navigated for approval.

17 City of St. Louis (2022d)

18 City of Tampa (2014)

19 Many live music venues, from bars and restaurants to dance clubs, seek liquor licenses in order to profit from alcohol sales at their businesses. Similar to event permitting, we look at accessibility of information and readability, whether or not processes can be fully completed online, and how many departments have to be navigated for approval.

20 City of St. Louis (2022a)

21 State of Iowa (n.d)

22 Similar to music curfews, when we look at noise laws, we look at any decibel limits, sound variance permits, amplified sound policies, and other noise considerations in a given city or area in order to assess the viability of hosting music events.

23 City of St. Louis (2008)

24 Music SA (2016)

25 Busking is defined as “the act of entertaining by dancing, singing, juggling, ect. on the street or in a public place.” – Dictionary.com LLC (2022). However, in some areas buskers can be confused with panhandlers and fined accordingly. We check for busk guidelines, policies, and protocols to decipher whether or not buskers are welcomed in a city.

26 City of St. Louis (2013) “St Louis City Ordinance 64105”. Online at <https://www.stlouis-mo.gov/government/city-laws/upload/legislative/Ordinances/slpPdf/ord64105.pdf> accessed 1.09.2023

27 Volunteer Lawyers and Accountants for the Arts (2017)

28 City of Asheville (2017)

29 We seek to decipher how many, if any, are present and whether or not there are any music-specific policies implemented in these districts. These can include special noise variances, open container policies, parking regulations, etc.

30 Explore St. Louis (2022)

31 The Grove (2022)

32 Cherokee Street (2022)

33 Grand Center (2022a)

34 Grand Center (2022b)

35 Quartier des Spectacles (2022)

36 This refers to a concentration of music businesses, rehearsal spaces, venues, and other resources in one area. We first consider whether or not there is a hub in the area and, if so, assess it based on types of resources, spaces, accessibility and affordability.

37 The Music District (2022)

38 The presence of music incentives is an important indicator of the health of a music ecosystem. Drawing new businesses of varying types is usually based on the incentives and resources available. For the purposes of this report, we look at whether music-specific incentives exist and what the incentive consists of.

39 City of St. Louis (2022c)

40 Georgia Music Partners (2017)

41 Tourism is an essential part of any city’s economy. It’s a source of revenue, employment, and opportunities. The extent to which a city considers and incorporates the music ecosystem into its tourism planning indicates how seriously the city takes music as an economic driver.

42 Hamburg Tourismus GmbH (2022)

43 Sustainability is a core tenant of a thriving music ecosystem. We look at whether or not city-wide sustainability programs consider the music ecosystem, if there is guidance on recycling specific to music venues, festivals, and music events, and if sustainable practices are considered in liquor and event permitting processes.

44 City of St. Louis (2013)

45 OneSTL (2013)

46 City of St. Louis (2022e)

47 Belfast City Council (2021)

48 These programs help educate the public on the value of music and the arts, as well as increase access to the arts. They build audiences and support for the music ecosystem.

49 TRESA (2021a)

50 Metropolitan Statistical Area (MSA)

51 16% of the respondents are highlighted in light pink. Within that 16%, the composition of the music genre is disaggregated in the eight square boxes on the right (4% experimental, 3% ska, 1% Christian & gospel, 1% classical, 1% country, 1% cabaret, 1% metal and 4% eclectic/genre-fluid/all genres).

52 Most of them (71%) have a role or job as a professional in a non-music field, besides their work in the music ecosystem and 31% have both a creative role in the music ecosystem and work in other music professional roles. Only 13% work exclusively as creatives & artists.

53 42% of professional creatives & artists that have recorded music have recorded in Missouri (outside of Greater St. Louis), 16% have done so in neighboring states to Missouri, 32% in the US (outside of Missouri), and 5% abroad.

54 Only 35% of the segment has 1 interaction with any agent of professional support, with marketing being the least of the priorities.

55 1 is equivalent to “Great Challenge” and 5 is equivalent to “Great Asset”.

56 The direct impact is the economic activity directly connected to the music ecosystem, such as musicians, agents and venues.

57 American Community Survey 2017

58 Ibid.

59 Ibid.

60 The indirect impact is supportive activity of the suppliers of the music ecosystem and is related to local businesses that provide goods and services, such as advertising, transportation and legal affairs.

61 The main components of this sector are the publishing industries, including software; motion picture and sound recording industries; broadcasting industries, telecommunications industries; Web search portals, data processing industries, and the information services industries.

62 Induced impact is created when the workers of the whole music ecosystem spend their wages on food, transportation, entertainment, etc. in their daily life.

63 Metro St. Louis (2021)

64 Cortex (n.d.)

65 The Kranzberg Arts Foundation (n.d.a)

66 The Kranzberg Arts Foundation (n.d.b)





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