

BOSTON SYMPHONY ORCHESTRA
ECONOMIC AND COMMUNITY IMPACTS
BOSTON, THE BERKSHIRES, AND MASSACHUSETTS

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Mt Auburn Associates and C3D wish to thank all of the staff members of the Boston Symphony Orchestra who took time out to meet with us and provide us with all of the information that we needed to understand the economic impact of the BSO. BSO staff provided us with the underlying data that was used to assess the economic impacts of the BSO. While we could not have completed the work without the cooperation of BSO, the analysis of this data is totally objective and based upon 'inter-industry' or 'input-output' analysis. This approach utilizes data that summarize the flow of goods and services between all sectors of the economy in a region. We also completed an independent on-line survey of Tanglewood ticketholders, to estimate their level of spending in the Berkshires.

Many economic impact studies are limited solely to the easily quantifiable data. We believed that this type of analysis while useful, would not fully represent the scale and scope of the economic contributions of the BSO to the Boston region, the Berkshires, or to the Commonwealth as a whole. As a result, we interviewed a wide range of both BSO staff as well as individuals who were "touched" by the BSO. This included individuals involved in the hospitality industry, realtors, vendors to the BSO, teachers, community based organizations, and individuals involved in operating affiliated programs. We also want to thank each of these 46 individuals who were willing to talk with us about their experiences. As this report illustrates, numbers tell a limited story. One must delve deeply into the non quantifiable economic impacts to tell the true, more comprehensive story of a cultural institutions relationship with the larger community that it serves.

The report benefited from the editing skills of David Fischer and the proofing and formatting skills of Judi Luciano.

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Executive Summary

As one of the world's premier performing arts organizations, the Boston Symphony Orchestra (BSO) ranks among the greatest cultural assets of the city of Boston, the Berkshire region, and indeed the entire Commonwealth of Massachusetts. In addition to the world-class symphony and the beloved Boston Pops, the BSO as a corporate entity also encompasses Symphony Hall, the home of both performing groups for more than a century and a National Historic Landmark; Tanglewood, the 525-acre property in western Massachusetts that has been the summer home of the BSO since 1937; and the Tanglewood Music Center, a world-renowned summer institute for young professional instrumentalists, singers, composers, and conductors.

The BSO's artistic and cultural pre-eminence is well known, and most informed observers grasp its significance as a major enhancement to the quality of life of Boston and the Berkshires. But few policymakers, businesses, or residents fully understand the important economic role that the BSO plays in these communities and the state as a whole. This report describes that role, from the \$166.7 million annually the BSO directly generates for the Massachusetts economy to its importance in making the state an international center for professional music education.

The BSO serves its local and state economies through the following roles:

- Employer and market for goods and services;
- Critical component of the tourism product in Boston and, to a greater extent, in the Berkshires;
- Enormous contributor, through its direct activities and the activities of its musicians, to the creative economy in Boston and throughout Massachusetts; and
- Enhancement to the image of its home city and state and through nationally televised programs and national and international tours.

QUANTIFYING THE BSO IMPACT

Considering all the factors we can quantify, **we conservatively estimate that the BSO exerts an annual economic impact of \$136.3 million in Suffolk County, which encompasses Boston; \$60.6 million in Berkshire County, where Tanglewood is located; and \$166.7 million in Massachusetts at large.**¹

This number includes the BSO's impacts as an employer, a corporate entity and a direct tourist attraction, which results in addition-

al spending by audiences on goods and services like meals and accommodations. It does not include some significant categories of expenditure that are more difficult to quantify, from the

BSO Economic Impact at a Glance (in millions)	
Suffolk County	\$ 136.3
Berkshire County	60.6
Massachusetts	166.7

¹ The statewide total is less than the sum of the two county totals because the state totals include only the impacts of audience visitors who come from outside Massachusetts. The county impacts include the effects of visitors to BSO events from outside each respective county, even if the visitors reside within Massachusetts.

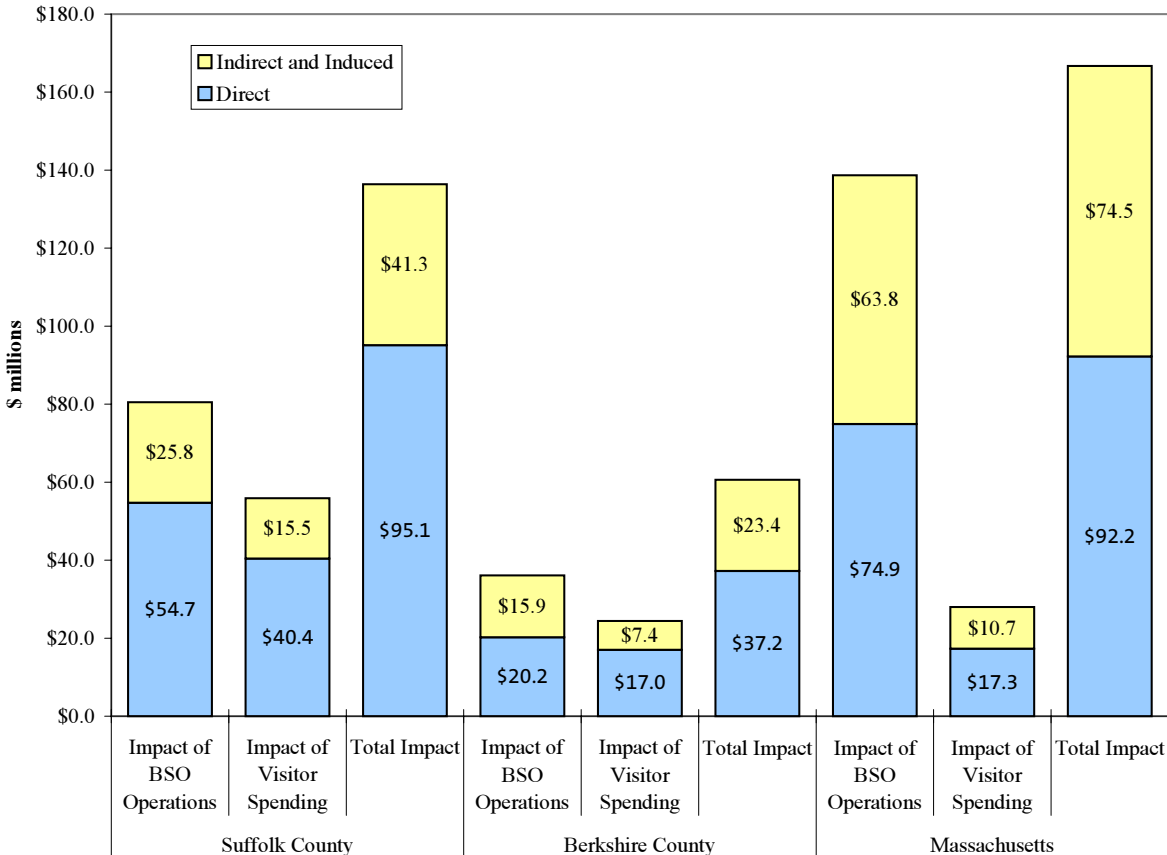
associated advertising and visitor spending related to the nationally network televised annual Fourth of July Concert on the Esplanade to the burgeoning second home market in the Berkshires.

The total quantitative BSO economic impact comprises the following components:

- Direct effects: the increases in local economic activity in the sector or industry in which the money is actually spent. These include BSO payroll outlays, and purchases of goods and services such as catering, building maintenance and repair, event production, and printing. They also include purchases of goods and services such as lodging, meals, local transportation, and retail goods by attendees of BSO concerts and related events;
- Indirect effects: the impacts on the local economy generated as the vendors who directly sell goods and services to the BSO and BSO-related visitors themselves purchase more of the things they need from other sectors (their suppliers) in order to meet increased demand; and
- Induced effects: occur when the BSO, its local suppliers, and businesses serving BSO-related visitors make wage payments to their employees, who then spend a portion of their incomes making local purchases for final consumption.

In total, BSO expenditures account for \$138.7 million in Massachusetts, nearly \$80.5 million in Suffolk County and \$36.1 million in Berkshire County. Visitor spending due directly to

Total Annual Economic Impact of the Boston Symphony Orchestra, Inc.



BSO-related events account for \$28 million statewide, \$55.8 million in Suffolk County, and \$24.5 million in Berkshire County. This includes spending by the approximately 1.5 million annual attendees at BSO-related performances. Analysis conducted for this report yields the estimate that visitors to Boston for Symphony Hall events spent an average of just under \$50 each on food, lodging, transportation, retail purchases and childcare; for Tanglewood visitors, the figure was over \$65 per visitor.

THE BSO AS EMPLOYER AND CORPORATE ENTITY

The BSO is the single largest performing arts organization in the Boston area, and one of the largest non-profit organizations. Its workforce in 2006 totaled 1,186 employees, who earned about \$33.2 million in salaries and wages. Of these, 284—about one-quarter—were full-time workers, while 902 held part-time or seasonal positions. Boston-based employees hold 70 percent of all jobs and 90 percent of the full-time positions, and earn about 96 percent of the compensation paid by BSO. Of course, a significant number of the Boston-based employees, including the musicians themselves, spend their summer months at Tanglewood and contribute to the local economy while there.

In addition to its payroll expenditures, the BSO directly spent nearly \$43 million in 2006, mostly on goods and services purchased from vendors. A quarter of these purchases were made in Boston, with a sizable share in Berkshire County and most of the remainder spread through 165 cities and towns across Massachusetts. Categories of expenditure include insurance, construction, food and beverages, graphic design and printing, media services and leasing of educational facilities. In this last case, rent paid by BSO during the summer months often helps private educational institutions meet their expenses and offer a higher quantity and quality of services year-round.

THE BSO AND TOURISM IN MASSACHUSETTS

Another aspect of the BSO's economic importance at the local and state level is its role as a spur to tourism, a vital industry that annually contributes roughly \$20 billion in spending, 200,000 jobs, and \$6 billion in wages to the Massachusetts economy. While the BSO economic impact here is far more difficult to quantify than direct revenues and expenditures, the BSO and the Pops are among the leading tourist draws to Boston and the Berkshires, helping to define how both locales are perceived. Images of the BSO, Pops and Symphony are staples of the marketing materials produced by tourism promoters in Boston and the Berkshires; the business card for Boston's Office of Travel and Tourism includes a photo of the Pops performing in the Fourth of July concert on the Esplanade.

We estimate that BSO-related visitor spending generates approximately \$56 million each year in local economic benefits to Boston. The Pops is a particularly powerful tourist attraction, deriving a fifth of its in-person audience from out-of-state visitors; additionally, Pops concerts are a major attraction for yearly conventions considering the city. The president of the Greater Boston Convention and Visitors Bureau describes the relationship between his staff and the sales and marketing team at Symphony Hall as "connected at the hip." The BSO exerts a smaller tourism impact overall, but tends to attract older, wealthier visitors, including those who come through group tour bookings that include transportation, accommodations and concert tickets. Finally, both the BSO and the Pops help "brand" Boston as a tourist destination, through exposure such as the Pops' fea-

tured performance at the yearly 4th of July Esplanade Concert, attended by a half million people and viewed on television by ten million more.

The significance of the BSO plays an even greater role in the tourism market in the Berkshires as compared to the total economic activity of the region: visitor spending gener-

Visitors to the BSO and Tanglewood from Outside of Massachusetts		
	Boston	Tanglewood
Total Number of Attendees	1,161,019	319,803
% of Attendees from outside of MA	13%	64%
Number of Attendees from outside MA	150,932	204,674

ates \$24.5 million each year in local economic benefits, the bulk of which accrues to hospitality-related businesses such as restaurants and resorts. The BSO is the single largest tourist attraction for the approximately 350,000 annual visitors to Tanglewood, virtually all of whom come within the two-month period of the BSO’s residency. Roughly two-thirds of the Tanglewood audience comes from outside Massachusetts; visitors tend to be older, well educated and wealthy. One indication of the BSO’s central importance to this industry is that reservations at Tanglewood-area inns and resorts spike each autumn after the BSO takes out an ad in the New York Times to publish the Tanglewood schedule for the following summer.

In all, the presence of the BSO at Tanglewood is perhaps the single largest factor in the Berkshires’ redefinition as a center for arts and culture tourism in the decades after its manufacturing sector began an irreversible decline. Tanglewood has helped spur a robust market for second homes in Berkshire County, as shown in a recent survey in which 58 percent of Tanglewood attendees who own second homes in the Berkshires cited proximity to the music festival as their primary or secondary reason for buying in the area. Among the BSO trustees and overseers alone, 30 own second homes in the Berkshires. Tanglewood has also encouraged the emergence of a performing arts community beyond the BSO itself that includes theater, museums, and art galleries. The Tanglewood Music Center and Boston University Tanglewood Institute, which is not directly run by the BSO but utilizes its rehearsal and performance facilities and includes BSO members in its faculty, both generate substantial additional revenues for the region.

DEVELOPING HUMAN CAPITAL AND THE CREATIVE ECONOMY

The BSO both exerts an enormous influence on the Massachusetts creative economy of today and plays an indispensable role in ensuring that tomorrow’s creative economy will be equally robust. **Each year, the BSO serves more than 60,000 students, teachers and families through its various educational offerings, at every level of education from elementary school to college graduates and every level of musical skill from hobbyists to aspiring professionals.** General programs for young people include

- *Musician in the Schools*, an effort that pairs eleven BSO performers with students in public schools throughout Boston, and
- *Days in the Arts*, a week-long summer program that exposes about 400 middle-school students to a variety of fine and performing arts offerings in the Tanglewood area.

- *Professional Development Workshops* and *Education Resource Centers* available to assist academic and music teachers with lesson plans, multimedia materials and the dissemination of best practices.

These activities both add to the educational experiences of students in the Bay State and help create the next generation of classical music supporters.

In terms of professional development, the BSO makes its biggest institutional mark with the Tanglewood Music Center, an internationally renowned educational program for musicians ready to embark upon their professional careers. TMC has trained more than 8,000 professional musicians over its seven-decade history, including about 30 percent of first-chair players in the major symphonies of the United States; Leonard Bernstein, Lorin Maazel and Wynton Marsalis are among many world-famous TMC alumni. More than half of BSO members are involved in teaching, coaching and curriculum development for the program. BSO musicians also play an important role in college-level music education in the Boston area.

BSO and Pops musicians are also tremendously important in providing music training at college level. Symphony and Pops members account for 60 percent of faculty at New England Conservatory of Music, over half at the Boston Conservatory of Music, and 45 percent at Boston University School of Music.

Another respect in which the BSO contributes to Massachusetts' creative economy is by its members' activities in developing commercial businesses that produce music-related products such as instruments, educational services and materials, and production equipment and facilities. The following are just a few of the many businesses launched or led by BSO musicians:

- Luis and Clark, a Milton-based firm co-owned by BSO cellist Luis Leguia that designs and manufactures carbon fiber string instruments; Leguia designed the cello that was the firm's first product.
- Vic Firth Inc., a Hyde Park-based business led by CEO Everett Firth, a BSO percussionist for over 50 years. With annual revenues exceeding \$17 million, the company is the world's largest producer of drumsticks and mallets, and also sells education packs and accessories.
- Sonic Temple, a former Masonic Temple in Boston's Roslindale neighborhood renovated by longtime BSO flutist Fenwick Smith into a state-of-the-art recording facility, that is lauded for its acoustical similarity to a real concert hall.

A final aspect of the BSO's economic importance is its role in helping to enhance Boston's image as a world-class city. In addition to their live performances, the BSO and Pops enjoy a worldwide audience through recordings—more than 750 by the BSO, and over 100 by the Pops—and televised broadcasts, including the annual Esplanade Concert. The Massachusetts corporate community acknowledges the BSO's role here through generous philanthropic support. Corporate backers gain both the esteem of other community actors for supporting this vital cultural asset, and benefits such as corporate networking and client entertaining opportunities.

ECONOMIC IMPACTS OF THE BOSTON SYMPHONY ORCHESTRA

Select Quantitative Facts

This report presents estimates of the economic impacts of the Boston Symphony Orchestra. We separately examine the impact on Suffolk County during the regular season and Berkshire County during the summer. In addition, we present estimates of the BSO's impact on the economy of the entire Commonwealth of Massachusetts.

Analysis of the BSO's annual budget, as spent in Suffolk County and Berkshire County, provide the following information about the economic impact of the Boston Symphony Orchestra.

In the Commonwealth of Massachusetts:

- The Boston Symphony Orchestra has annual expenditures of \$74.9 million in fiscal year 2006
- Using a state-level analysis, the economic impact of these expenditures is \$138.7 million of increased economic activity annually for the Commonwealth of Massachusetts
- Of the 1,480,822 attendees to BSO events during fiscal year 2006, 355,606 were visitors from outside the state
- The expenditures of these out of state visitors while attending BSO events resulted in an additional \$28.0 million of increased economic activity within the state
- The total economic impact of the BSO's expenditures and visitor expenditures on the Commonwealth of Massachusetts is \$166.7 million annually

In Suffolk County:

- The BSO spends \$54.7 million of its annual budget to support its Boston operations
- Using a county-level analysis, the economic impact of these expenditures on Suffolk County is \$80.5 million annually
- Of the 1,161,019 attendees to Boston based BSO events during fiscal year 2006, 1,007,532 were visitors from outside of Suffolk County
- The expenditures of these visitors resulted in \$55.9 million of increased economic activity within Suffolk County
- The total economic impact of the BSO's expenditures and visitor expenditures on Suffolk County is \$136.3 million annually

In Berkshire County:

- The BSO spends \$20.2 million of its annual budget to support Tanglewood
- Using a county-level analysis, the economic impact of these expenditures on Berkshire County is \$36.1 million annually
- Of the 319,803 attendees to Tanglewood events during fiscal year 2006, 310,209 were visitors from outside of Berkshire County
- The expenditures of these visitors resulted in \$24.5 million of increased economic activity within Berkshire County
- The total economic impact of the BSO's expenditures and visitor expenditures on Berkshire County is \$60.6 million annually

1

INTRODUCTION

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BASS CLARINET



1.1 Purpose of this Report

As one of the world's premiere performing arts organizations, the Boston Symphony Orchestra (BSO) ranks among the most significant cultural "assets" of the city of Boston, the Berkshire Hills region, and, indeed, the entire Commonwealth of Massachusetts. It is clear that the BSO is an important component to the local and state artistic and cultural environment and a major contributing factor to the quality of life of Boston and the Berkshires understand the important economic role that the BSO plays in these areas and in the state as a whole. Most people, for example, would probably be surprised to learn that the BSO directly employs over 1,000 people, generates almost \$30 million annually in out-of-state tourism revenues, and has played a critical role in making Massachusetts an international center of professional music education.

This report seeks to quantify and clarify the role played by the BSO in the Boston, Berkshire, and Massachusetts economies. The effort goes beyond traditional economic impact studies in two ways. First, in order to provide a fuller understanding of the BSO's economic impacts, it augments quantitative analysis with real-life examples of the BSO's connections to individuals, residents, vendors, and the larger cultural sector. From the BSO flutist who built a world-class classical music recording studio in a struggling Boston neighborhood to the local business that provides catering services to the BSO, the report seeks to make abstract economic concepts more tangible. Second, the report documents some of the less easily measured impacts of the BSO related to enhancing the attractiveness of the Boston area and the Berkshires as places to live, work, meet, and operate a business. The report identifies and details the types of "qualitative" economic impacts that hold tremendous importance to the long-term economic vitality of the local and state economies.

1.2 Overview of the Boston Symphony Orchestra

The Boston Symphony Orchestra, Inc., is the corporate umbrella under which five distinct brands operate: the Boston Symphony Orchestra, Boston Pops, Symphony Hall, Tanglewood, and Tanglewood Music Center. When measured by the size and scope of its activities, the BSO is the largest symphonic organization in the world. Its performances attract an audience of almost 1.5 million listeners every year, and its hundreds of recordings and broadcasts have reached millions more.

The Boston Symphony Orchestra (BSO). Founded in 1881, the BSO began its 127th season in 2007-2008. The BSO performs at Symphony Hall between October and May, and at its summer home, Tanglewood, during July and August. One of the world's leading symphony orchestras, the BSO has performed throughout the United States, as well as in Europe, Japan, Hong Kong, South America, and China. In addition, it reaches audiences numbering in the millions through its performances on radio, television, and recordings. It plays an active role in commissioning new works from today's most important composers; its summer season at Tanglewood is regarded as one of the world's most important music festivals; and it helps develop the audience of the future

through BSO Youth Concerts and various outreach programs to Boston and Berkshire communities. James Levine began his tenure as the BSO's 14th music director in 2004.

In addition to the full orchestra, the BSO features two other musical performance groups. The Boston Symphony Chamber Players are made up of 11 of the principals of the BSO. The all-volunteer Tanglewood Festival Chorus, organized in 1970, is the official chorus of the Boston Symphony Orchestra, performing year-round in Boston, New York, at Tanglewood, and on tour.

Boston Pops. The Boston Pops Orchestra, which consists of the members of the BSO minus the Boston Symphony Chamber Players, performs at Symphony Hall from May through mid-June and during the December holiday season. The Boston Pops Esplanade Orchestra (BPEO), which consists of freelance musicians from Boston organized by the BSO, performs in Symphony Hall from mid-June through July and plays free outdoor concerts at the Hatch Shell on the Charles River Esplanade during July (including the annual Fourth of July celebration attended by over half a million people and watched by more than 10 million on network television). The BPEO also tours extensively nationally during December holidays and during the summer. Established in 1885 to provide a lighter summer alternative to BSO concerts, the Pops was led by the legendary Arthur Fiedler for over 50 years until his death in 1979. In 1995, Keith Lockhart was appointed 20th Conductor of the Boston Pops, replacing John Williams, who remains the Boston Pops Conductor Laureate.

Symphony Hall. A National Historic Landmark, Symphony Hall has been the home of the Boston Symphony and Boston Pops orchestras since its completion in 1900. Designed by architects McKim, Mead & White with acoustic consultation from Harvard physicist Wallace Clement Sabine, Symphony Hall is one of the most acoustically perfect symphonic concert halls in the world. In addition to BSO and Pops concerts, Symphony Hall hosts Boston's renowned Handel and Haydn Society and the annual Boston Celebrity Series, which brings distinguished performing artists to the city.

Tanglewood. Located in the Berkshire Hills of Western Massachusetts, Tanglewood has been the summer home of the Boston Symphony Orchestra since 1937. The 525-acre property includes the Koussevitzky Music Shed, a large outdoor performance facility; the Seiji Ozawa Concert Hall; the Tanglewood Music Center; and a vast expanse of parkland open to the public. In addition to the BSO, which performs there every weekend in July and August, Tanglewood hosts an extensive schedule of summer performances representing a vast range of musical forms and styles. This includes the Boston Pops, the Tanglewood Music Center Orchestra, chamber music players, choral groups, pop vocalists, dance companies, local favorite James Taylor, and the Labor Day weekend Tanglewood Jazz Festival. All told, Tanglewood's various performances draw an annual audience well above 300,000.

Tanglewood Music Center. Founded in 1940 as the Berkshire Music Center, the Tanglewood Music Center (TMC) is a world-renowned summer institute for young professional instrumentalists, singers, composers, and conductors. Every summer over 150 "Fellows" attend the TMC free of charge to study with its renowned faculty, which consists of members of the Boston Symphony Orchestra and other celebrated musicians.

1.3 Understanding the BSO's Economic Impacts

While the BSO's artistic and cultural contributions are widely recognized, less well known are the many elements of the BSO that also have significant economic and community impacts. To understand its economic role, we must look at the BSO's varied dimensions. These include:

1. ***The BSO as an employer and market.*** The BSO is a large market for goods and services for many businesses in Massachusetts. Its spending generates significant economic benefits throughout the local and regional economies of Boston and the Berkshires.
2. ***The BSO as a critical part of the tourism product in Boston and the Berkshires.*** As one of the state's premiere cultural attractions, the BSO has helped to brand Boston and the Berkshires as international centers of cultural tourism. Its performances draw millions of dollars in annual tourist spending to the state.
3. ***The BSO's role in the state's creative economy.*** The BSO's contributions to the state's creative economy go far beyond its direct activities. Symphony Hall and Tanglewood provide venues for other talented performers. BSO musicians frequently form their own music groups that perform across the state. Some performers found or otherwise contribute to businesses that sell music products and services nationally and internationally. Finally, the BSO's education and music appreciation programs help to develop a new generation of audiences to support the performing arts.
4. ***The BSO's role in enhancing the image of Boston and Massachusetts.*** Cities and regions increasingly depend on their quality of life to attract the talented workers that provide a competitive economic advantage. The strong support the BSO receives from the local corporate community reflects, in part, its recognition that a rich cultural environment is vital to drawing professional, technical, and creative workers, and the companies that employ them, to Massachusetts.

By examining the BSO's many dimensions, this report documents its role as a major factor in the prosperity of Boston, the Berkshires, and the state at large—generating jobs for its residents, markets for its businesses, and a skilled workforce for its employers.



2

QUANTIFYING THE BSO'S ECONOMIC IMPACTS



Like any enterprise, the BSO generates income and uses it to pay employees and to purchase goods and services. These expenditures, in turn, have secondary impacts as BSO vendors spend the income earned and their employees purchase local consumer goods and services. These impacts are felt most strongly in Boston and around Tanglewood, but elsewhere in Massachusetts as well. In addition, visitors who come to Boston and Tanglewood to attend BSO performances spend money for lodging, meals, transportation, and retail purchases, and these expenditures also have secondary impacts. These are the quantifiable economic impacts of the BSO.

Using input-output analysis, the method used to calculate these economic impacts, we conservatively estimate the BSO's annual economic impact as \$136.3 million in Suffolk County, comprising primarily the city of Boston, \$60.6 million in Berkshire County, where Tanglewood is located, and \$166.7 million in Massachusetts at large.

2.1 A Framework for Measuring Economic Impacts

We use the term “economic impact” to describe the economic contribution of an organization or activity to the local and regional economies. Our examination of the economic impacts of the BSO in Boston, the Berkshires, and in Massachusetts is based on three categories of economic activities:

- ***The BSO as an employer in Massachusetts.*** The BSO provides jobs in Boston and the Berkshires and pays wages. BSO employees spend these wages locally and elsewhere in the state, on goods and services; these purchases accrue to other businesses, which then employ more workers and pay wages.
- ***The BSO as a corporation.*** The BSO purchases goods and services from Boston and Berkshire area companies and other Massachusetts companies, including catering, building maintenance and repair, event production, and printing. These companies, in turn, employ workers and pay wages, and purchase goods and services from other companies. These earnings then circulate back into the economy, generating more activity.
- ***The BSO as an attraction.*** Visitors travel to Boston and the Berkshires specifically to attend BSO performances and other Symphony Hall and Tanglewood events. These visitors spend money to purchase meals and snacks, hotel rooms, cab rides, souvenirs, and other goods and services in Massachusetts.

These interrelated economic effects—business sales, employment, and wages—comprise part of a “chain” of economic activity; by generating additional business sales, the BSO also supports the jobs created by this increase in output. A portion of the business sales revenue is used to pay wages for those jobs. In economic terms, each type of expenditure by the BSO and BSO-related visitors has three related effects:

- ***Direct effects*** are the increases in local economic activity in the sector or industry in which the money is actually spent. These include BSO payroll outlays, and purchases of goods and services such as catering, building maintenance and repair, event production, and printing.

They also include purchases of goods and services such as lodging, meals, local transportation, and retail goods by attendees of BSO concerts and related events.

- *Indirect effects* are the impacts on the local economy generated as the vendors who directly sell goods and services to the BSO and BSO-related visitors themselves purchase more of the things they need from other sectors (their suppliers) in order to meet increased demand.
- *Induced effects* occur when the BSO, its local suppliers, and businesses serving BSO-related visitors make wage payments to their employees, who then spend a portion of their incomes making local purchases for final consumption.

To provide an estimate of the economic effects of the BSO on the Boston/Suffolk County, Berkshire County, and Massachusetts economies, we make use of “inter-industry” or “input-output” analysis. This approach utilizes data that summarize the flow of goods and services between all sectors of the economy in a region, including transactions between firms and households.¹ Using such a model allows us to better understand how the activities of the BSO and the visitors it attracts affect the local and state economies.

First, we consider the local purchases of the BSO and its visitors and trace these expenditures. These, in turn, promote the growth of local economic activity in other sectors that expand to accommodate the demand, which, in turn, make purchases from other sectors. The completed process captures the total change in spending and income associated with purchases of production inputs, including labor and materials, and the use of this production by other industries, or as final consumption.²

2.2 The Economic Impacts of the BSO

The total direct, indirect, and induced economic impacts of the BSO on Suffolk County, Berkshire County, and Massachusetts, are displayed in Table 2.1. This includes BSO payroll, BSO purchases of goods and services, and BSO visitor spending. It should be noted that the effects on the entire Commonwealth are not simply the sum of impacts on Suffolk and Berkshire counties. Since the analysis takes into account the increased business activity that occurs in other Massachusetts counties as well as the displacement of economic activity from these other counties to Suffolk and Berkshire counties, the effects at the state level are actually less than the sum of the effects in the two counties.

¹ Nourse, Hugh O. *Regional Economics*. (New York: McGraw-Hill, 1968), 137. The economic impacts discussed in this report were determined using IMPLAN (<http://www.implan.com/>), a software analysis package and database that utilizes data collected from the U.S. Bureau of Economic Analysis. It provides analysis of the levels of economic activity in each U.S. County from a potential 528 sectors of the economy.

² O’Sullivan, Arthur. *Urban Economics*, 5th Ed. (New York: McGraw-Hill, 2003), 135-137.

Table 2.1: Total Annual Economic Impacts of the BSO

Type of Effect	Direct	Indirect	Induced	Total
Suffolk County	\$95,076,267	\$25,123,893	\$16,141,357	\$136,341,520
Berkshire County	37,228,693	11,528,067	11,849,023	60,605,784
Massachusetts	92,171,996	32,828,834	41,666,821	166,667,648

IMPACTS OF DIRECT BSO SPENDING

The economic impacts of direct BSO spending on payroll and goods and services are displayed in table 2.2

Table 2.2: Annual Economic Impacts of BSO's Direct Expenditures³

Type of Effect	Direct	Indirect	Induced	Total	Income Multiplier
Suffolk County	\$54,686,000	\$15,909,509	\$9,885,626	\$80,481,137	1.47
Berkshire County	20,208,000	8,860,117	7,070,599	36,138,717	1.79
Massachusetts	74,894,000	28,666,497	35,118,758	138,679,252	1.85

The greatest impact of BSO direct spending occurs in the sector where the monies are actually spent – the performing arts. Other sectors that are most strongly affected include: independent artists, writers and performers; owner-occupied dwellings; and real estate.

As the table indicates, the ratio of indirect and induced efforts to direct effects (i.e., the income multiplier) is higher in Berkshire County than in Suffolk County and higher still at the state level. In a county such as Berkshire County, where culture and tourism are major industries, it is possible that businesses are attracted into the county to support and supply these major industries. When local suppliers exist within a county, monies spent can circulate more within the county before ‘leaking’ to suppliers outside of the local economy. This is indeed the case in Berkshire County, where expenditures by the BSO result in a greater per dollar economic impact than in Suffolk County. At the state level, additional indirect and induced impacts outside of Berkshire and Suffolk counties are captured, resulting in an even higher multiplier.

IMPACTS OF BSO-RELATED VISITOR SPENDING

In addition to expenditures of the organization itself, the BSO generates economic benefits for its two host communities by drawing visitors to its performances. Visitors spend money locally, creating additional economic impact in these communities.⁴

³ Inter-industry analyses such as this one operate on county or state levels. To calculate the economic impacts of BSO activities in Boston, Suffolk County was used as the geographic unit of analysis. All budget figures are from FY06 and all impacts are given in 2006 dollars.

⁴ For the county-level analyses, we conceptualize visitors as those attendees to performances and events who live outside of the county, and residents as those attendees who live in the county.

In order to estimate the impact of visitors on the local economy, we need two basic pieces of information: the number of visitors during the year; and the amount each visitor spends in the area during the visit. Total attendance at BSO and BSO-produced concerts during FY2006 was 1,480,822. Symphony Hall events had 1,161,019 attendees, among which 87 percent, or 1,007,532, lived outside Suffolk County. Tanglewood events had 319,803 attendees, among which 97 percent, or 310,209, lived outside Berkshire County.

We estimate the amount spent by each BSO visitor in Boston as \$49.43, and the total spent by each BSO Tanglewood visitor at \$65.44. The Boston figure is derived from the results of a survey of visitors to cultural venues in selected cities nationwide,⁵ and the Tanglewood estimate utilizes the results of an e-mail survey recently conducted by the BSO.⁶ Table 2.3 breaks down these two estimates:

Table 2.3: Expenditures per Visitor to Boston and Tanglewood⁷

	Boston	Tanglewood
Meals	\$21.27	\$21.06
Overnight lodging	14.21	34.42
Transportation	5.64	3.90
Retail purchases	8.31	5.91
Childcare	0.50	0.15
Total	\$49.93	\$65.44

In consideration of the argument that there may be a “displacement effect”⁸ for residents, we calculated only the economic impact of visitors rather than all attendees. Some non-local visitors to

⁵ The Americans for the Arts engaged in extensive surveying of cultural arts visitors in 2005 nationwide. The results of these visitor expenditure surveys are available at several levels, including by region, size of city, and the national average. After examining these figures, we used the expenditure figures from the Philadelphia County, Pennsylvania, study region as the best available estimate of Boston per visitor expenditures. Americans for the Arts. 2007. “Arts and Economic Prosperity III: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences,” National Report.

⁶ We use the expenditure figures from an e-mail survey conducted by the BSO in January 2008. The survey was sent to 7,934 e-mail addresses available for previous ticket purchasers to BSO events. Survey questions were designed to be as similar as possible to those used in the Americans for the Arts survey used for average visitor expenditures in Boston. The survey received 1,377 responses (a 17.4% response rate). Of these responses, 132 had not attended an event within the past year and were not included. There were 75 responses from individuals who did attend an event but were not ‘visitors’ since they reside in Berkshire County. Eleven responses were discarded because of lack of response to essential questions or other data problems. This left 1,159 responses whose average values were used to calculate a per visitor, per day expenditure for lodging, meals, childcare, local transportation, and other retail expenditures. These were then deflated to 2006 price levels for comparability with other values used in the analysis.

⁷ These estimates take into account the fact that some visitors may stay overnight in the county while others will return home after an event. Similarly, only a portion of visitors will buy a meal in the county as part of their visit.

⁸ “Displacement effect” means that if residents did not attend this event they might otherwise have spent the same amount of disposable income locally. Visitors, on the other hand, are attracted into Suffolk and Berkshire counties by BSO events and spend money in these counties that they might otherwise have spent in their resident county.

MARKETING THE BSO RELATIONSHIP

BSO's many vendors not only benefit directly and provide indirect benefit to the local and state economy from sales to the BSO, but also have been able to build on their relationship with this prestigious and highly visible institution to develop new business opportunities. The stories of a few of these vendors exemplify this collateral benefit.



Somerville-based **Jules Catering** has operated Symphony Hall's Symphony Café since 2004 and also caters many Symphony Hall events. Jules' event sales manager reports that exposure to BSO's corporate patrons has helped the firm to build its corporate client base: "When we are selling our services, saying we are the exclusive caterer at the BSO Café gives us a lot of credibility." The BSO relationship has also helped Jules expand its business with another important market, higher education institutions. While Jules has a well-developed clientele in this market, exposure to senior administrators and faculty who attend concerts and special events has increased its visibility and led to additional sales.

The BSO retained Boston-based **Ana Beha Architects** to develop a master plan for Symphony Hall renovations in 1999. The firm designed some recent Symphony Hall improvements and is now developing programs for additional restoration and improvements at both Symphony Hall and Tanglewood. Ana Beha already has an established reputation working with cultural, civic, and academic organizations, but the firm's BSO project manager considers the BSO its highest-profile client. "You can't quantify it, but when you are working for the BSO, you are working for the best."

Canton-based **High Output, Inc.**, a production services firm, provides lighting equipment and set up for both Symphony Hall and Tanglewood events, and supplies lighting for Symphony and Pops tours. The director of the firm's Theater and Events Division has found that taking prospective clients to BSO and Pops concerts to display the firm's work is good marketing. The firm's work at Tanglewood has helped develop a market in western Massachusetts, and its national tour work has helped it to develop professional relationships that could ultimately expand its national market.

Pittsfield-based **Quality Printing Company** has been providing high-quality printing services to Tanglewood since 2001 and began doing additional work for the BSO in 2005, including printing its annual report. The firm is not only a vendor, but also a business partner at Tanglewood, in part for philanthropic reasons but also because it makes good business sense. "When you form these partnerships and work together, it benefits you," explains the firm's business development manager. "Showing that we work with the BSO or Tanglewood helps us in marketing. It is a high-end organization." The firm has heavily emphasized its relationship with the BSO as it has extended its marketing into Boston. Notes the business development manager, "It gives you more credibility that you can deal in the Boston market."

BSO performances reside outside the state and thus generate economic benefits at the state level. The state-level visitor impact analysis employs the same expenditure estimates but adjusts the visitor numbers to include only non-state visitors: these visitors can be considered to make a contribution to the state economy since they might otherwise have spent the same amount of disposable income elsewhere in the state. Based on analyses of zip code data, surveys, and spot checks at Tanglewood, we determined that nearly 151,000 attendees at Symphony Hall performances, and 205,000 at Tanglewood, came from outside the state during FY2006.⁹ (See Table 2.4) It is notable that while many more patrons attend performances at Boston’s Symphony Hall, a much higher percentage of Tanglewood attendees come from out of state.

Table 2.4: Visitors to Boston and Tanglewood from Outside of Massachusetts

	Boston	Tanglewood
Total Number of Attendees	1,161,019	319,803
% of Attendees from outside of MA	13%	64%
Number of Attendees from outside MA	150,932	204,674

The analysis also found that visitor spending has the most impact in sectors where the monies are actually spent, including food and beverage services, lodging, and retail. In both Suffolk and Berkshire counties, notable impacts were also found in the real estate sectors, and at the state level notable impacts were found in the wholesale trade sector.

IMPACTS OF BSO SPENDING BY INDUSTRY SECTOR

BSO-related spending flows into many industry sectors, but has a particularly strong impact on a small number of sectors. The distribution of impacts by sector differs among geographic areas because of variations in spending patterns.

In Suffolk County, a total of 253 industry sectors—out of a total of 273 in the county—experience increased economic activity as a result of the BSO’s presence. The four sectors with the biggest impact are performing arts companies (\$54.8 million), food services and drinking places (\$22.7 million), hotels and motels (\$14.1 million), and real estate (\$3.9 million).¹⁰ (See Table 2.5) These four sectors collectively account for just over 70 percent of the BSO’s impact in Suffolk County. Other sectors that benefit from BSO-related expenditures in Suffolk County include independent performers, businesses that own the rights to perform music, and wholesalers.

⁹ Calculations were based on analyses of zip code data, surveys, and spot checks at Tanglewood. Source: Boston Symphony Orchestra, private communication, 9/21/2007.

¹⁰ Growth in the real estate sector occurs when sectors experiencing increased demand as a result of BSO-related expenditures expand their facilities to meet that demand.

Table 2.5: Top Sectors in Suffolk County Impacted by the BSO

Sector	Amount	% of Total
Performing arts companies	\$54,833,561	40.3%
Food services and drinking places	22,697,001	16.6%
Hotels and motels	14,135,582	10.4%
Real estate	3,937,456	2.9%

In Berkshire County, a total of 208 sectors experience increased economic activity as a result of Tanglewood’s presence. The top four are performing arts companies (\$20.3 million), hotels and motels (\$9.9 million), food services and drinking places (\$7.1 million), and independent artists, writers, and performers (\$3.8 million); they collectively account for just over two-thirds of the total impact. (See Table 2.6) Other sectors that benefit from BSO-related spending in Berkshire County include real estate, management of companies and enterprises, commercial printing, and promoters of performing arts.

Table 2.6: Top Sectors in Berkshire County Impacted by Tanglewood

Sector	Amount	% of Total
Performing arts companies	\$20,283,022	33.5%
Hotels and motels	9,921,812	16.4%
Food services and drinking places	7,092,929	11.7%
Independent artists, writers and performers	3,832,036	5.6%

A total of 429 sectors of the state economy experience increased economic activity due the BSO. The largest by far is performing arts companies (\$75 million), followed by food services and drinking places (\$9.8 million), hotels and motels (\$8.9 million), and independent artists, writers, and performers (\$6.5 million). They collectively account for approximately 60 percent of state-level impact. (See Table 2.7) Other sectors in Massachusetts that receive BSO-related spending include real estate, promoters of performing arts, and employment services.

Table 2.7: Top Sectors in Massachusetts Impacted by the BSO

Sector	Amount	% of Total
Performing arts companies	\$75,038,211	45.0%
Food services and drinking places	9,808,031	5.9%
Hotels and motels	8,850,233	5.3%
Independent artists, writers, and performers	6,495,675	3.9%

ECONOMIC IMPACT SUMMARY

Table 2.8 below shows the full economic impact of the Boston Symphony Orchestra on its relevant economies, with the economic impact of visitors included.

**Table 2.8 Impacts of Boston Symphony Orchestra
on Suffolk County, Berkshire County, and the Commonwealth of Massachusetts**

	Suffolk County	Berkshire County	Massachusetts ¹¹
Annual Expenditures	\$54,686,000	\$20,208,000	\$74,894,000
Direct Effects	54,686,000	20,208,000	74,894,000
Indirect Effects	15,909,509	8,860,117	28,666,497
Induced Effects	9,885,626	7,070,599	35,118,758
Effects of BSO Expenditures	80,481,137	36,138,717	138,679,252
Attendees	1,161,019	319,803	1,480,822
Visitors ¹²	1,007,532	310,209	355,606
Direct Effects	40,390,267	17,020,693	17,277,996
Indirect Effects	9,214,384	2,667,950	4,162,337
Induced Effects	6,255,731	4,778,425	6,548,063
Effects of Visitor Expenditures	55,860,383	24,467,068	27,988,396
Total Economic Impact	136,341,520	60,605,784	166,667,648

¹¹ The economic impact of the BSO on the Commonwealth of Massachusetts is not the sum of the impacts on individual counties. The state model is a separate model that examines inter-industry flows of good and services among states in order to estimate the impact of the BSO on Massachusetts. You will note, in particular, that the impact of visitor expenditures for the state is lower than that for Suffolk County. This is because a higher percentage of attendees to the BSO in Boston come from outside of Suffolk County than attendees to either venue come from outside of the state.

¹² Visitors are defined as BSO attendees who live outside of the geographic impact area. For example, 310,209 of the 319,803 attendees at Tanglewood are “visitors” who live outside of Berkshire County. Overall only 355,606 of the 1,480,822 attendees to both the BSO in Boston and Tanglewood live outside of Massachusetts.

3

THE BSO AS AN EMPLOYER AND CORPORATION: PAYROLL AND SPENDING



3.1 Direct Employment and Payroll at the BSO

Like many cultural organizations, the core activities of the BSO tend to be very labor-intensive. Day-to-day activities utilize large amounts of labor with very little reliance on inputs associated with more traditional economic activities, such as manufacturing. As such, a large portion of BSO’s total budget is spent on wages, salaries, and benefits.

The size of the BSO’s workforce and payroll may come as a surprise to many. In 2006, its workforce totaled 1,186 employees earning about \$33.2 million in salaries and wages. Two hundred eighty-four employees, or about one-quarter, held full-time positions, while 902 held part-time or seasonal positions. The BSO is one of the largest nonprofit organizations in the Boston area and the area’s largest performing arts organization, with an annual budget more than three times greater than the second-ranked organization.¹³ It is also the world’s largest orchestral institution, as measured by scope of operations. In addition to musicians and other artistic staff, the BSO employs significant numbers of workers in management and administration, facilities operations (e.g., audience services, production technical support), and facilities maintenance. Other employees hold jobs in fundraising, sales, and educational programming.

LOCATION OF JOBS

Boston-based employees hold approximately 70 percent of the BSO’s direct jobs, including almost all of the full-time positions, and earn the overwhelming majority of compensation paid by the BSO. The remaining jobs, most of which are part-time or seasonal, are held by employees who work primarily at Tanglewood. Of course, many employees who work primarily in Boston, including BSO musicians, spend their summer months living, working, and spending a portion of their earned income in the Berkshires. Accordingly, the impact of employee spending in the Berkshires is likely to be greater than the data indicate. Table 3.1 displays full- and part-time employment by the location of BSO jobs, as well as the wages paid to workers who hold these jobs.

Table 3.1: BSO Employment and Payroll by Primary Place of Work, 2006.

	Full-Time	Part-Time	Total	% of Combined Total	Full-Time	Part-Time	Total	% of Combined Total
Boston	274	572	846	71%	\$25,216,088	\$6,520,581	\$31,736,669	96%
Tanglewood	10	330	340	29%	626,843	816,322	1,443,165	4%
Combined Total	284	902	1,186	100%	25,842,931	7,336,903	33,179,834	100%

Source: Boston Symphony Orchestra

¹³ “Area’s Largest Performing Arts Organizations,” 2007 Book of Lists, Boston Business Journal, 2007.

Another way to look at direct impacts of the BSO on Boston, the Berkshires, and other parts of Massachusetts is by examining where BSO employees live. Over 1,000 BSO employees, almost 90 percent of the total, live within Massachusetts. About two-thirds live in various communities within the Boston metropolitan area and another one-fifth live in Berkshire County. Workers spend money near their jobs, but also buy and rent homes and purchase other goods and services near their homes using paychecks earned at their jobs.

TYPES OF EMPLOYMENT

BSO employees work in a variety of positions. Among professional positions, musicians and other artistic staff comprise the largest share: almost 30 percent of all employees and almost 60 percent of payroll. Managerial and administrative employees—including senior management, accountants, and marketing and public relations—account for another large group of professional positions, with 16 percent of total employment. Other professional positions include development and education.

Among trades and service positions, the largest numbers of workers are employed in facilities maintenance and audience services, with 20 percent and 16 percent of total employment, respectively. Facilities maintenance employees include carpenters, electricians, painters, plumbers, and cleaners. Audience services employees include ushers, kitchen staff, waiters, and bartenders. The vast majority of these positions are part-time. Smaller numbers of workers are employed in sales and production services, including technicians who operate production equipment. (See Table 3.2 for a detailed breakout of the varied jobs that keep the BSO functioning.)

Table 3.2: BSO Employment by Job Category, FY 2006

Category	Full-Time	Part-Time	Total	Total Payroll
Musicians and other artistic	107	244	351	\$19,712,305
Managerial/administrative	90	102	192	6,598,465
Facilities maintenance	31	206	237	2,442,802
Development	34	11	45	2,043,206
Education	13	59	72	910,584
Audience services	2	189	191	809,206
Ticket and retail sales	7	30	37	532,498
Production services	0	61	61	130,768
Total	284	902	1,186	33,179,834

3.2 Purchases of Goods and Services from Outside Suppliers

In 2006, the BSO had non-payroll expenditures of close to \$43 million. Much of this was spent on goods and services purchased from vendors. Well over half of these purchases were made in Massachusetts. While one-quarter were made in the city of Boston, significant purchases were also made in Berkshire County and elsewhere in the state (see Table 3.3 below); in all, the BSO purchased goods and services from vendors in 165 cities and towns across Massachusetts. Some

of the largest expenditures in Massachusetts are for insurance, construction, food and beverages, graphic design, printing, media services, electrical supplies, production equipment, hotels, and leasing of educational facilities.

Table 3.3: Distribution of BSO Non-Payroll Expenditures by Location

Area	Non-Payroll Expenditures	Percent of All Dollars Spent
Total Massachusetts	\$24,123,613	56.6%
City of Boston	10,631,117	24.9%
Berkshire County	4,106,446	9.6%
Other Massachusetts	9,386,049	22.0%
Out of State	18,523,095	43.4%
Total	\$42,646,708	100.0%

Source: BSO

SPACE LEASED FROM SCHOOLS IN THE BERKSHIRES

Two Berkshire County private educational institutions, Miss Hall’s School in Pittsfield and Bard College at Simon’s Rock, earn substantial income by leasing space to the BSO that helps these institutions sustain their operations.



For 12 years now, Miss Hall’s School has enjoyed a mutually beneficial relationship with the Tanglewood Music Center (TMC). The school receives \$400,000 in lease payments annually, housing approximately 150 to 160 TMC fellows every summer. In addition to taking up virtually every available dormitory room, the TMC has the use of office and rehearsal space, and access to the school’s library, phones, and some Internet access. The school keeps one administrator on-site during the TMC summer program, and hires several more people for basics like housekeeping, linen service, and security.

Miss Hall’s derives a great deal of value from its relationship with the TMC. The school’s website proudly notes that it is the summer home of the Tanglewood Music Center. “TMC’s impact is significant and very helpful to us,” the school’s director asserts. “Without it,” she points out, “we would have to find other ways to use the school over the summer and bring in income.”

Bard College at Simon’s Rock also benefits from a relationship with Tanglewood. The school is the summer home of the Days in the Arts Program (DARTS), a 12-week program that brings in roughly 60 young people and 15 adults each week to gain a greater appreciation for the performing arts. DARTS paid Simon’s Rock a total of \$207,000 in 2007 to use the school’s dormitories and other facilities during the program. Just as important, according to the Simon’s Rock program staff, it allows the school to keep eight full-time staff over the summer. “If we had to lay these people off for the summer, we could lose them. DARTS helps us to keep them year round.”



今年は五嶋みどり出演

ニューイングランド夏の風物詩 タンゲルウッド 音楽祭

Tanglewood

Photo by Dan Borris

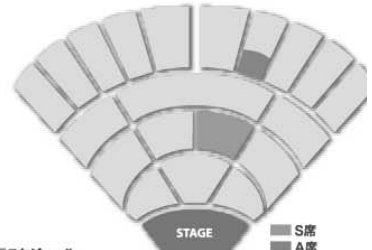
マサチューセッツ州とニューヨーク州の州境パークシャー地方に位置する山間部の小さな街タンゲルウッド。この高原の澄んだ空気と大自然に包まれて、タンゲルウッド音楽祭は1936年8月13日の第1回公演を皮切りに、ボストン交響楽団の毎年夏の恒例行事として続けられてきた由緒ある野外音楽祭だ。210エーカーの広大な敷地に、Music Shedと呼ばれる屋根付きの野外音楽堂を中心としたいくつかのホールが建造され、パークシャーの豊かな自然とクラシック音楽堂が見事に調和した夏の行楽地としてタンゲルウッドは長年に亘りクラシックファンだけでなく多くの人々に愛されている。音楽祭の期間中、毎週土曜日の午後1時からタンゲルウッド交響楽団や室内楽団、ボストン交響楽団の運営する若手音楽家養成機関であるタンゲルウッド・ミュージックセンターの団員によるオーケストラ等、クラシックの公演を主体に開催される。加えて、ジャズやポップスの演奏もあふれる。ボストン交響楽団の公開リハーサルも行われるなど、ジャンルを問わず多くの人々を魅了する場所となっている。

特筆すべきは、指揮者小澤征爾氏がウィーン国立歌劇場音楽監督に就任するまでの約30年間、ボストン交響楽団の音楽監督を務めると同時に、タンゲルウッドでの若手の育成やコンサートの開催に尽力してきたことだ。今年2008年は小澤征爾氏の出演は予定されていないが、世界を舞台に活躍する若手バイオリニスト・五嶋みどり氏がソリストとしてタンゲルウッド音楽祭のステージに登場する。



五嶋みどり出演 NY発日曜 タンゲルウッド音楽祭とノーマンロックウェル美術館

■ 開催日: 2008年7月19日(土)
■ ツアー代金: 大人(6歳以上) S席指定 \$190 A席指定 \$160
※ボストン交響楽団の規定により6歳未満のお子様はコンサートホールに入ることができません。より、当ツアーは6歳以上のお子様限定のツアーさせていただきます。



■ スケジュール

午後12時 ニューヨークヒルトンホテル(53丁目6番街)出発
午後3時30分頃 ノーマンロックウェル美術館到着、鑑賞(約1時間)
午後5時頃 タンゲルウッド到着、会場内自由行動
午後8時30分 大音楽堂Music Shedにてコンサート開始
午後11時頃 タンゲルウッドを出発
翌朝午前3時頃 ニューヨーク到着、ニューヨークヒルトンホテル又はグランドセントラル駅前にて解散

～コンサートプログラム～
Vaughan Williams "Five Variants of Dives and Lazarus"
Tchaikovsky "Violin Concerto"
Copland "Symphony No.3"

～出演～
Boston Symphony Orchestra
Leonard Slatkin, Conductor
Midori, Violin

主催: H.I.S. International Tours (NY) Inc.

※ツアー代金に含まれるもの: コンサートチケット、空港入場料、往復の交通費(本人負担)、ホテル代(本人負担)、旅行保険料(本人負担)、現地ガイド料(本人負担)、現地交通費(本人負担)、現地食料(本人負担)、現地土産(本人負担)、現地入場料(本人負担)、現地駐車料(本人負担)、現地送迎料(本人負担)、現地送迎車(本人負担)、現地送迎ドライバー(本人負担)、現地送迎ドライバー保険料(本人負担)、現地送迎ドライバー燃料費(本人負担)、現地送迎ドライバー保険料(本人負担)、現地送迎ドライバー燃料費(本人負担)、現地送迎ドライバー保険料(本人負担)、現地送迎ドライバー燃料費(本人負担)...

BSO'S ROLE IN MASSACHUSETTS' TOURISM INDUSTRY

ノーマン・ロックウェル美術館
アメリカの日常生活を題材にしたイラストの数々は、白く瀟洒な美術館の建物や周囲の木々の緑と共に、訪れる人々に穏やかで楽しい時間を与えてくれる。

Tourism is Massachusetts' third largest industry, responsible for roughly \$20 billion in spending, 200,000 jobs, and \$6 billion in wages annually. The industry plays a major role in both the Boston and Berkshire County economies, and the BSO and Pops are important tourism generators in both of these areas. In Boston, the BSO and Pops are among a handful of institutions, sites, and events that define the city's national and international image. Tanglewood, the single most important tourism draw for the Berkshires, serves a similar role for that region. Highlights of the numerous contributions made by the BSO and the Pops to the Commonwealth's tourism industry include:

- between 300,000 and 400,000 visitors to Tanglewood annually, almost two-thirds from outside the state;
- over a half million people attending the nationally televised Fourth of July Boston Pops Esplanade Concert, one-third from out of state. The concert is probably the most widely recognized single event held in Boston annually.
- the leading role played by the BSO in "branding Boston" as a center of world-class cultural activity;
- the BSO's important contribution to the development of niche markets including cultural and educational tourism;
- the leading role played by the Boston Pops in marketing Boston as a convention venue;
- Tanglewood's central role as a catalyst for the Berkshire's second home industry, a significant and growing source of local income and jobs; and
- spending by guest performers and by faculty, students, and family members brought to Massachusetts by the BSO, Pops, and related educational programs.

4.1 Visitor Impacts in Boston

The BSO and Pops play a significant role in Boston's tourism economy, drawing a large number of visitors and contributing to important segments of the tourism industry; we conservatively estimate that BSO-related visitor spending in Suffolk County generates \$55.9 million annually in local economic benefits. The BSO and Pops are among a handful of organizations that inform Boston's image nationally and internationally as a center of arts and culture. The Pops, with its wide audience appeal, derives a fifth of its in-hall audience from out-of-state visitors and has figured prominently in entertainment packages for major conventions. The BSO, though a more modest tourism generator, attracts important niche segments, including older, wealthier, cultural tourists and groups of music students. In addition to generating revenues to support the BSO and Pops operations (out-of-state visitors spent approximately \$2.5 million for tickets and over \$500,000 on food, beverages, and retail items at Symphony Hall in 2006), visitors attracted in full or part by these organizations spend money in local restaurants, hotels, retail shops, and other local tourism attractions.

The BSO and the Pops figure prominently in the "branding" of Boston as a tourism destination.

Boston's image as a center of arts and culture rests in significant part on perceptions of Symphony Hall and its two resident performing companies. State and local tourism organizations



BOSTON POPS FOURTH OF JULY ESPLANADE CONCERT

The Boston Pops Independence Day Esplanade Concert is one of Boston's signature annual events. Inaugurated in 1976 to mark the 200th anniversary of American independence, the concert typically attracts an audience of over 500,000. The program includes traditional favorites such as Tchaikovsky's 1812 Overture, performed with accompanying cannons and church bells, and John Philip Sousa's "Stars and Stripes Forever," complemented with a diverse music selection that changes annually, some performed by special guests such as Jennifer Holliday, Debbie Reynolds, David Lee Roth, Cyndi Lauper, LeAnn Rimes, and John Mellencamp. The musical program is followed by a spectacular fireworks display. The event is broadcast nationally on network television reaching 10 million viewers.

A highlight of Boston's civic and cultural life, the Pops Independence Day concert also contributes significantly to Boston's tourism economy. According to a 2005 audience survey conducted by Boston 4 Celebrations, the organizer of the event, 32 percent of the concert audience lived outside Massachusetts, including 25 percent who lived outside of New England. Based on general estimates of spending by visitors to special events calculated for the Boston Convention and Visitors Bureau, spending by these approximately 160,000 out-of-state visitors approaches \$20 million annually.

consistently include images of Symphony Hall, the BSO's world-renowned conductors, and particularly the Independence Day Pops concert on the Charles River Esplanade in national and international marketing materials. The president of the Greater Boston Convention and Visitors Bureau describes the Esplanade concert, attended by over half a million people annually, as the "quintessential Boston experience."

The Pops is heavily promoted in the marketing of Boston as a convention venue, and Pops concerts are often featured events in convention entertainment packages.

Symphony Hall's sales and marketing staff works very closely with the Greater Boston Convention and Visitors Bureau (GBCVB) to include the Pops in convention marketing efforts. In a reference to this close relationship, the president of the GBCVB characterizes the collaboration between GBCVB and Symphony Hall sales and marketing staff as "being connected at the hip." He adds, "It's a synergistic relationship—we use them to reinforce the brand, while they use us to get bookings." The GBCVB's Vice President for Convention Services and Sales numbers the Pops among the top three attractions for convention visitors to Boston. The GBCVB recently purchased 60,000 Pops CDs to distribute at trade shows and other promotional events. In some instances, Pops conductor Keith Lockhart himself has attended marketing events.

Typically, three or more conventions annually contract with the Pops to give special performances at opening or closing events. In addition, conventions held during the Spring Pops season frequently purchase blocks of Pops tickets to make available to convention attendees and spouses.

The BSO and Pops are an important attraction for group tours, and have worked with other major tourism attractions to build this market.

The BSO has an extensive group sales program, working with tour operators to develop packages that include transportation, lodging, and concert tickets. During the 2006-07 season, 864 group tours purchased blocks of tickets for BSO and Pops Symphony Hall concerts. Almost 200 of these groups with a total of approximately 10,000 individual visitors came from outside of Massachusetts, including 29 states, four Canadian provinces, and two other foreign countries.

The BSO has developed a particularly successful group tour collaboration with the Elderhostel organization. The BSO was the first orchestra to collaborate with Elderhostel on its “Day of Discovery” program, in which visitors attend a Symphony Hall BSO concert and enjoy an afternoon of educational tours and lectures. Seventeen such events have been held between 2005 and 2007, and all have sold out. These events were so successful that Elderhostel selected Tanglewood to mount a three-day educational conference in summer 2007, organized and run as a partnership between Elderhostel and the BSO; the program sold out completely.

Middle and high school student groups are another important and growing segment of the BSO’s group tour market. These groups travel to Symphony Hall from both local areas and from all across the United States and Canada. In 2006, the BSO sold 6,634 tickets to 102 student groups, working with the BSO’s Education Office to develop a program customized for each visiting school—including workshops targeting student bands, orchestras, and choirs—in addition to tickets to a BSO or Pops concert.



THE POPS’ ROLE IN BOSTON’S CONVENTION INDUSTRY

The Pops has proven to be a critical asset in efforts to promote Boston as a convention venue.

- In August 2007, the Greater Boston Convention and Visitors Bureau organized a convention promotion event in association with a Pops concert performed at the Wolf Trap Filene Center outside Washington, D.C. The GBCVB invited national conference and event planners to a pre-concert reception to learn more about Boston’s assets as a convention venue, followed by complementary attendance at the concert.
- The National Conference of State Legislatures (NCSL) held its annual convention in Boston in August 2007. The closing event of the conference was a performance by the Pops with Keith Lockhart conducting. At NCSL’s 2006 convention, the GBCVB helped NCSL promote conference attendance for the following year by offering 500 Pops CDs to distribute as gifts to the first 500 registrants.
- In 2006, the American Society of Association Executives, the trade organization of convention planners, held its annual convention in Boston. The convention provided an ideal opportunity to showcase Boston’s offerings as a convention venue. Significantly, the Greater Boston Convention and Visitors Bureau arranged to host a Pops concert with Keith Lockhart conducting for 3,500 at the convention’s closing event.

Most popular are the master classes, clinics, and instrument demonstrations given by members of the BSO or Pops. The largest student program has come out of the BSO's three-year partnership with Heritage Festivals of Salt Lake City, Utah. Heritage has organized its Festival of Gold with the BSO, bringing approximately 800 students into the Boston area in 2007.

The BSO and Pops are working to further develop Boston's group tourism market through their participation in the recently established Boston Attractions Group (BAG), a collaborative of 13 major attractions in the city. The BAG jointly promotes these attractions and assists tour planners and tour group leaders with tour packaging. It operates a user-friendly website and participates in many tour and travel trade shows throughout the northeast. Since its establishment in December 2006, BAG has sent representatives to 12 such shows.

SPENDING BY GUEST PERFORMERS

In addition to audiences drawn by the BSO and Pops, Boston's tourist economy also benefits from spending on hotels, restaurants, transportation, and other goods and services by visiting performers with those groups. Drawn by the prestige of a BSO performance, 13 guest conductors and close to 70 guest artists are slated to appear during the 2007-2008 season. Even more significant are the large music ensembles that perform at Symphony Hall through the Celebrity Series and individual concert productions, which attract musicians and production staff from around the globe. During the 2005-2006 season, visiting companies performing at Symphony Hall included the Guangzhou Symphony Orchestra, Ireland's Cross Board Orchestra, the Yellow River Orchestra, Statskapelle Berlin, the London Philharmonic, the Soweto Gospel Choir, and the China National Symphony.



4.2 Visitor Impacts in the Berkshires

Unquestionably, one of the Berkshires' most significant generators of economic activity, Tanglewood consistently draws between 300,000 and 400,000 visitors a year to its concerts and performances—all in a two-month season. For the vast majority of Tanglewood visitors, attending a Tanglewood performance is the primary reason for visiting Berkshire County. According to a survey of Tanglewood ticket purchasers conducted in January 2008, 84 percent of respondents who had attended a Tanglewood event in 2007 reported that attendance at the event was the primary reason for their visit to Berkshire County. All told, BSO-related visitor spending in Berkshire County generates \$24.5 million annually in local economic benefits.¹⁴

Tanglewood is the single most important source of income for the Berkshires' hospitality industry. Most Tanglewood visitors come for short periods, stay in the area's inns, B&Bs, and resorts, and dine in area restaurants. In addition to short-term vacationers, a smaller number of

¹⁴ See Table 2.3. Visitors are defined as individuals living outside Berkshire County.

Tanglewood devotees as well as BSO musicians and staff have purchased second homes in the Berkshires, driven in full or part by the desire to reside near Tanglewood during its season. Though smaller in number, these individuals spend longer periods of time in the Berkshires and purchase a wide range of personal and household goods and services.

Finally, additional hundreds of individuals affiliated with the BSO, the Tanglewood Music Center, and other related organizations—BSO musicians, faculty, students, staff, and guest artists—spend all or part of the Tanglewood season in the Berkshires, staying in lodging establishments, renting homes, buying food, and making other day-to-day purchases that bring additional income to the area.

TANGLEWOOD AUDIENCE

Visitors who travel to the Berkshires to attend Tanglewood performances are the single most important factor driving the area's hospitality industry.

Almost two-thirds of the yearly Tanglewood audience arrives from outside Massachusetts, primarily New York and Connecticut. These visitors tend to be older, more educated, and economically well-off—the population most highly coveted by the hospitality industry. In addition to tickets for concerts and performances, they also spend, quite heavily, on accommodations and food. As a result, a hospitality industry consisting of inns, hotels, B&Bs, restaurants, and resorts has grown around Tanglewood, and those businesses have become the prime beneficiaries of the spending power that Tanglewood's audience brings. BSO-related spending generates revenues of about \$10 million annually to Berkshire County's lodging industry and \$7 million to its food and beverage services industry.¹⁵

Owners and managers of area lodging establishments report that Tanglewood has a profound economic impact on their businesses. Many concertgoers remain in the area for two or more days to attend performances or extend their stay to enjoy other cultural and recreational activities. This translates into increased room reservations at most accommodations, the start of the seasonal three-night minimum at most inns and hotels, as well as the expansion of some facilities (i.e., more rooms, and larger quarters). The impact is particularly strong in southern and central Berkshire County.

Additionally, while the concerts and performances at Tanglewood generally satisfy this audience's musical tastes, there is still a significant appetite for the quality food that is prepared in many of the county's restaurants. Consequently, many of the restaurants in the area see a spike in business during the Tanglewood season.

For many Berkshire businesses in the hospitality sector, the July and August months of the Tanglewood season are the two busiest of the year, with revenues from those two months accounting for as much as 70 percent of the annual total. According to one innkeeper, "We gross about 50 to 60 percent of total income during July and August, and about 60 percent of that revenue comes from our guests who are going to Tanglewood. If it wasn't for Tanglewood, our business wouldn't be as healthy as it is." Another innkeeper said he bought his inn almost 15 years ago

¹⁵ See Table 2.6.



PUBLICATION OF THE TANGLEWOOD SCHEDULE: BELLWETHER OF TANGLEWOOD'S IMPACT ON BERKSHIRE TOURISM

One telling annual indicator of the role of Tanglewood in area tourism comes immediately after the the BSO publishes the Tanglewood schedule in the New York Times in the late fall. Businesses like the Red Lion Inn, the Stockbridge Inn, small B&Bs in central Berkshire County, Cranwell, and Canyon Ranch see a sharp uptick in reservations. One innkeeper noted, "The e-mail traffic heats up and the number of reservations is often the highest shortly after Tanglewood publishes its schedule." A senior manager at one resort stated, "Many of our regulars look the schedule over, find the concerts they want to attend, and immediately call to make their reservations." Even the owner of a very small B&B "knows when the schedule is published because the phone starts ringing.

when it had eight rooms. He notes, "Tanglewood is the number one reason that our guests are here during the summer. We added another eight rooms in large part because of the consistent business we get related to Tanglewood." The owner of a high-end inn and restaurant indicated, "When Tanglewood is here, 70 to 75 percent of my lodging business and almost 90 percent of my restaurant business is directly attributable to it."

Tanglewood visitors are both numerous and loyal: many return year after year. This often means a degree of customer consistency and predictability during the summer season. One innkeeper said that one of his guests has been "coming to Tanglewood and staying in area inns and B&Bs for 52 years." A senior manager at one of the county's premier inns said, "If it wasn't for Tanglewood's reliable audience, this place would be a gas station."

Tanglewood is a central focus of marketing by the Berkshires' hospitality industry businesses, and the BSO actively assists these efforts.

Tanglewood plays a key role in the positioning of small- and larger-sized businesses alike. As a senior manager at an inn said, "We put Tanglewood in our marketing materials because it conjures an image of culture and we want that association when our guests are thinking about lodging." Another innkeeper noted, "Including Tanglewood in our marketing materials locates us geographically, culturally, and philosophically."

The BSO works closely with the hospitality industry to market the region. It is an active member of the Berkshire Visitors Bureau (BVB), and BSO marketing staff members have traveled with the BVB to promote the Berkshires at tourism promotional conferences and on sales trips in the U.S. and Europe. In addition, in 2006 and 2007, the BSO partnered with the BVB to organize the "Discover the Berkshires Tour & Travel Expo" at Symphony Hall, where Berkshire hotels, restaurants, and attractions promoted their properties to Boston area tour and travel professionals.

Tanglewood visitors expand the audience for other local cultural activities.

Many visitors who come to Berkshire County to attend a Tanglewood performance also engage in other cultural activities while visiting the area. In a survey of recent Tanglewood visitors conducted in January 2008, 39 percent reported attending other cultural events or venues during their visit. These included theatrical, musical, and dance performances, museums, and art galleries. Among the most frequently mentioned were Berkshire Theatre Festival, Clark Art Institute, Jacob's Pillow, MASS MoCA, Norman Rockwell Museum, Shakespeare & Company, and Williamstown Theatre Festival—all activities that Tanglewood actively markets through printed and on-site materials.

SECOND-HOME OWNERS

Tanglewood has played a leading role in the development of the second-home market in central and southern Berkshire County.

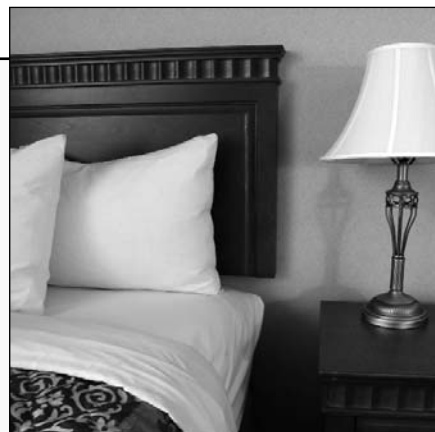
The second-home market is an important and growing element of the Berkshire County economy. For a large number of second-home owners, proximity to Tanglewood is a major factor in their choice of Berkshire County for a purchase.

In a recent survey of Tanglewood patrons, 14 percent of respondents reported owning or renting a second home in the Berkshires and 58 percent of these reported that proximity to Tanglewood played either a primary or secondary role in their selection of the home.

BSO MARKETING PARTNERSHIPS WITH BERKSHIRE AREA LODGING ESTABLISHMENTS

The collaborations between the BSO and some of the hospitality businesses in the county help those businesses both to maintain their existing customer base and attract new customers. Some examples:

- The general manager of a local resort reported, "I work closely with the public relations and marketing people at Tanglewood to develop different kinds of packages. Our guests love this and it adds to the experience they have with us. Just as important, it helps push up our midweek business."
- Another resort receives an allotment of tickets from a sponsor's fee and offers guests parking privileges. According to the resort's cultural coordinator, "The Tanglewood experience is a complement to what we offer our guests and it accounts for roughly 20 percent of the business we do during the summer. It keeps the regulars coming and adds to the experience of new guests."
- A local inn has several packages with bus tour companies that include lunch at the inn and tickets to a Tanglewood performance. Additionally, it works closely with Tanglewood on one- to two-day trips for cultural and business groups. Reports the inn owner, "This kind of activity brings in dozens of meals and the same for lodging. Without Tanglewood, we couldn't get this kind of business."



Local realtors attribute the overall development of the second-home market in these areas largely to Tanglewood, which preceded and stimulated other major cultural offerings that now also draw second-home buyers. In addition to Tanglewood patrons, many individuals affiliated with the BSO and Tanglewood also own second homes, including an estimated 40 to 50 percent of current BSO musicians as well as many retired musicians. Other musicians who perform frequently at Tanglewood and nearly 30 BSO trustees and overseers have also purchased second homes in the area. Among the internationally known artists with second homes are cellist Yo-Yo Ma, James Taylor, and pianists Peter Serkin and Emanuel Ax.

Second-home owners generate significant income for the Berkshire County economy.

Second-home owners in the Berkshires tend to have high levels of disposable income and spend a significant amount of time during summer months, if not the entire season, in the Berkshires. Second homes typically sell in the range of several hundred thousand to several million dollars. Many second-home owners are retirees who spend their entire summer in the area. Most of the remainder live in the New York and Boston regions, but use their second homes for several weeks during the summer and numerous weekends throughout the year.

THREE FOR SALE

Country Quiet Not Far From Tanglewood



<p>WHAT 2-bedroom cottage HOW MUCH \$265,000</p> <p>Built in 1940 and rebuilt in the 1990s, this 1,600-square-foot wood-frame cottage sits on 1.09 acres and has</p>	<p>WHAT 4-bedroom house HOW MUCH \$599,000</p> <p>This colonial-style 4,162-square-foot house was built in 1989 and sits on 1.5 wooded acres. It has three and a half</p>	<p>WHAT 4-bedroom house HOW MUCH \$1,595,000</p> <p>This 4,464-square-foot house was built in 1967 and sits on 1.1 acres with 225 feet of frontage on Otis Rd.</p>
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SECOND-HOME TAX REVENUES HELP BERKSHIRE TOWNS

The Boston Symphony Orchestra generates approximately \$2.3 million in property taxes for Berkshire County towns through Tanglewood patrons' second residences. Although many of these properties are clustered in Lenox, Stockbridge, and Richmond, others are scattered

throughout the county as far as Sheffield and Williamstown, ultimately providing each Berkshire town or village with some level of property-tax revenue.

Analysis of the BSO's database reveals more than 700 patrons who have attended recent Tanglewood performances have a second or seasonal address in the Berkshires. By searching publicly available town records, researchers determined the average assessed value of Tanglewood patrons' second residences in Berkshire County to be \$640,790. The average property taxes paid on these homes and condominiums is \$5,669 per residence, ultimately producing nearly \$4 million in property-tax payments. A survey of Tanglewood patrons revealed that 58 percent of those who owned seasonal homes in the Berkshires cited the music festival as either their first or second reason to buy property in the area. Therefore, the BSO helps to generate more than \$2.3 million in property-tax revenue for Berkshire County towns.

It is important to note that most of these property owners only use their homes seasonally, and their part-time occupancy results in a reduced burden on municipal infrastructure. This ultimately provides the towns in which they reside with a positive fiscal impact.

The demand for second homes has stimulated a number of new housing developments over the years as well as the construction of customized homes, generating significant income for the real estate and construction industries. Buyers of existing homes also typically make significant investments in upgrading or rebuilding. One realtor estimates that many new homebuyers invest 10 to 20 percent over the purchase price in improvements, generating income for architects, interior designers, and construction contractors. Said one realtor, “We’re all living off the second-home market here in south and central county.” Second-home owners have contributed heavily to the development of other sectors as well, including maintenance (home caretaking, lawn maintenance, snow plowing, and house cleaning), the restaurant sector, and performing arts groups other than the BSO.

BSO musicians, staff, and other BSO-affiliated individuals who own second homes are significant contributors to the Berkshires’ second-home economy. In addition, other BSO musicians, staff, and Tanglewood Music Center faculty rent homes, providing income to primary homeowners and other area businesses. Because they stay in the area for the entire Tanglewood season, both BSO-affiliated second-home owners and renters frequently bring their entire families with them, amplifying their economic impact. Some send their children to local summer camps, helping to sustain these organizations.

TANGLEWOOD-AFFILIATED VISITORS

In addition to the BSO’s direct expenditures on Tanglewood staffing and operations, Tanglewood-affiliated visitors spend significant dollars in the community. This includes spending by Tanglewood guest artists; fellows at the Tanglewood Music Center (TMC); and faculty, staff, and students at the Boston University Tanglewood Institute (BUTI); as well as friends and family of TMC and BUTI attendees.

LOCAL SPENDING GENERATED BY THE BOSTON UNIVERSITY TANGLEWOOD INSTITUTE

An educational program for high school music students, BUTI is administratively independent of Tanglewood but contracts with the BSO for educational services and facilities. BUTI has 370 students (270 enrolled for an eight-week program, 100 attending two-week seminars), 75 faculty members, and a staff of over 40. Local spending includes the following:

- Faculty and some staff are housed in about 30 homes in the Lee, Lenox, Stockbridge area at rental cost of about \$200,000.
- Staff and faculty purchase most of their own food locally.
- Payments to local vendors include \$30,000 to a local bus company and \$27,000 to a local cleaning service.
- More than 100 parents typically attend the final week or weekend of performances, spending locally on lodging, food, and incidentals.



5

OTHER IMPACTS

5.1 Building Human Capital

OVERVIEW

The continued competitiveness of the Massachusetts economy depends heavily on the intellect and skills of its emerging workforce. A growing body of evidence suggests that music education can contribute to academic achievement for all students, not just those who plan to pursue a career in music. But the Commonwealth also benefits economically from an educational infrastructure that develops professional musicians. A vibrant cultural scene contributes to the quality of life that is essential to attract highly talented professional and technical workers. And professional musicians often apply their talents to teaching that spawns the next generation of music professionals and to music-related commercial enterprises that create additional jobs and income. The BSO makes an extensive contribution to music education for students at all levels, from elementary school students to skilled musicians on the verge of embarking on professional careers.

INCREASING ACADEMIC ACHIEVEMENT THROUGH MUSIC EDUCATION

Each year, the BSO serves over 60,000 students, teachers, and families through Youth Concerts, school partnerships, professional development, and summer programs in Tanglewood. Most of the students served by these programs will never go on to pursue professional music careers, but nonetheless derive significant academic benefits.

The BSO offers a number of instructional programs providing direct educational experiences for a wide range of students, in addition to training and resources for educators.

The Musicians in the Schools program pairs 11 BSO musicians with groups of music students from public elementary, middle, and high schools in Boston. In each case, the musician visits music classes four times over the course of a year, focuses on demonstration and discussion, or, for more advanced music students, holds classes or coaching sessions with specific instrumental sections.

Days in the Arts (DARTS) offers a week-long summer program to approximately 400 middle school-age students who gain exposure to a variety of fine and performing arts, including theater, dance, and visual arts in addition to music.

In addition to the BSO's direct work with students, the organization seeks to leverage its music education activity by offering *Professional Development Workshops* to strengthen the quality of music education in the area. The workshops are targeted to both music educators as well as classroom teachers seeking to better integrate music into instructional practices.

Housed in the Boston Academy for the Arts/Fenway High School Library in Boston and at the Berkshire Music School in Pittsfield, Massachusetts, the *Education Resource Centers* offer more than 14,000 books, curriculum materials, slides, videos, CDs, and computer software, as well as free curriculum assistance, a planning facility for teachers and administrators, a media technology center, and space for professional development seminars. Renowned for its instructional programs and expert staff, as well as for its unique public-private collaboration, the Education Resource Center served more than 700 teachers in 2006.



WORCESTER PARTNERSHIP: EXTENDING BSO MUSIC EDUCATION PROGRAMS BEYOND BOSTON AND THE BERKSHIRES

The BSO has an extensive relationship with the Worcester Youth Symphony (WYS) as part of its Worcester Partnership with multiple organizations in that community.

The WYS has two orchestras divided by age and ability. The older orchestra—generally students in grades seven through 12—travels twice a year to Symphony Hall for a full-day interaction, instruction, and performance. The components of the day, developed jointly by the youth orchestra director and the BSO, might include sectionals rehearsals, master classes, side-by-side rehearsals, and guest conductors. The students get feedback from BSO musicians that the youth orchestra director characterizes as “very direct and blunt,” giving them a sense of expectations for those who aspire to perform at a high level. They also sit in on closed and open rehearsals, and stay through the evening to attend a BSO performance.

The younger orchestra—the fifth through eighth graders—travel to Symphony Hall for a youth concert. They go on backstage tours and meet some of the musicians. They spend a half-day and go to the instrument petting zoo. The students all travel together on the bus for a bonding experience but the families are encouraged to come.

The youth orchestra director sees several benefits to the BSO program, particularly around self-esteem and training. “Worcester is not a glamorous town. Fancy cultural programs are not a part of regular life here. For kids to go to Symphony Hall and know the players by name is a huge confidence (builder).” He adds, “The experience also helps develop their sense of responsibility in terms of what is required to achieve excellence. It makes a huge difference in their playing. The Symphony players don’t coddle them. They are quite blunt when the kids’ level of playing is not acceptable. For our most talented players, it really pushes them to the next level. It keeps them from getting too comfortable. They are nice, but they say it straight.”

BSO educational programs develop not only musical skills, but also other intellectual capacities that are essential characteristics of a skilled workforce.

Music education helps to develop the region’s human capital workforce in many ways. The most visible impact may be developing the new cadre of musicians who will pursue careers as professional musicians, but music education appears to have an impact on a larger population of children who will never earn a living as a musician. A substantial body of research and anecdotal evidence suggests that music education in particular, and other forms of fine arts education more generally, can lead to a better trained, better prepared workforce in the future. Programs such as Musician in the Schools and DARTS, and features like the Youth and Family Concert Series—the first exposure many Boston children have to symphonic sound—help students deepen their understanding of and relationship with music and other forms of cultural arts. Some of the notable impacts of music education are summarized below.

**MUSICIAN IN THE SCHOOLS: ROLAND HAYES
SCHOOL OF MUSIC, MADISON PARK HIGH
SCHOOL COMPLEX, BOSTON PUBLIC SCHOOLS**

George Simpson, principal of this small high school, wanted to develop an institutional partnership with a musician that was more robust and involved than the one-shot, “cultural drive-by” model that had frustrated him in past experiences. He found such a relationship with BSO horn player Eli Epstein. Together, they designed a program that had Eli work with 15 seniors five times in the fall between October and December.

Eli talked to the students, then moved on to beginning preparation for senior solo performances and worked with students on how to practice, how to choose repertoire, and how to research repertoire.

Eli also invited the students to a concert at Symphony Hall, spending a full hour before the performance talking with the students about the music they were going to hear. He played pieces of the music over and over again so they could listen for certain aspects he was discussing. Simpson observed with amazement that he was able to engage the 18-year-old learning musicians with this music.

Simpson felt the program was highly successful because of the frequency of interaction, the personality match between Eli and the students, and the time Eli took to get to know the students and their interests. “He took the time to establish a real connection.” The BSO also took the time to understand what his school wanted out of the relationship, customizing the partnership to the needs of the institution.

“It taught the kids not only how to listen to unfamiliar music, but how to approach and appreciate unfamiliar cultural endeavors,” Simpson says. “It gave kids the tools to access the unfamiliar. It taught them you don’t have to be a 65-year-old white guy to appreciate the music.”



- Music may lead to increased academic achievement and the development of creative and higher order thinking skills. A lively debate continues on the relationship between music and academic performance. Some studies have found that music improves mathematical and spatial abilities; others have found improvement in auditory comprehension and reading skills, while other studies have found little to no impact. Given the variety of research, it is likely that some relationship exists, but the power of that relationship and how educators might best capitalize on it are yet to be determined. Similarly, anecdotal evidence suggests that music has an impact on the critical thinking skills that are and will be in such demand by employers.
- Music is a powerful pedagogical tool for certain learners. Researchers have discovered that music is not only a topic to be learned but also a learning tool that helps some children better comprehend a variety of subjects. Led by the work of Howard Gardner, researchers have developed a theory of multiple forms of intelligence. For schools to reach the broadest spectrum of children in the classroom, they must adapt instructional practices to reach a variety of types of

learners. Gardner’s research identifies music as one of seven “intelligences,” and suggests that it should be an integral part of classroom instruction.

- Music provides the motivation for some to continue on an academic path. For some students, music is what inspires them to come to school on a daily basis. A 2006 study released by the National Association for Music Education, and conducted by Harris Interactive, found that 96 percent of public school principals interviewed believe that participating in music education encourages and motivates students to stay in school longer, and 89 percent agree that music education contributes to higher graduation rates.
- Music fosters personal and social development. A plethora of anecdotal evidence suggests that music training improves students’ self-discipline as well as teamwork skills. Music students’ commitment to instruction, practice, and improvement requires a self-discipline that many believe carries over into other aspects of the students’ lives. In much the way that an athlete competing in a team sport relies on her teammates to achieve her goals, a musician learns to work cooperatively with other members of a band, orchestra, or chorus to achieve a desired sound.

DEVELOPING THE NEXT GENERATION OF PROFESSIONAL MUSICIANS

In addition to its broad involvement in music education, the BSO and its individual members play a vital role in helping young people with exceptional musical talent to advance toward careers as professional classical musicians. These programs work with students at every stage of their musical development, from elementary and secondary education to the post-secondary level, and into the early stages of their professional careers. Many of today’s most noted classical musicians received training through BSO programs.

TRAINING FOR EMERGING PROFESSIONALS

The BSO’s Tanglewood Music Center is an internationally recognized educational program for musicians ready to embark on their professional careers

The Tanglewood Music Center was founded in 1940 by Serge Koussevitzky, conductor of the Boston Symphony Orchestra from 1924 to 1949. The intent was to develop a two-month (July and August) premiere music training program targeted to extraordinarily talented, young instrumentalists, vocalists, conductors, and composers who would become the next generation of classical music leaders. As Koussevitzky viewed it, the program would give these young, aspiring musicians a chance to “sharpen their skills under the tutelage of the Boston Symphony Orchestra and other world-class artists.”

In the course of its 67 years of operation, TMC has trained more than 8,000 musicians, most of whom work for the principal symphonies and orchestras in the field or teach in the more prestigious graduate and undergraduate music education programs. Leonard Bernstein, Lorin Maazel, Leontyne Price, Zubin Mehta, Wynton Marsalis, Ned Roren, and Lukas Foss are among the most famous alumni of the program.

The TMC auditions as many as 1,700 students each year and chooses approximately 150 “Fellows” to participate. The Fellows are mostly young men and women in their early- to mid-twenties who have completed most of their formal musical training. Its affiliation with the BSO

is foremost among the program’s distinguishing characteristics. More than half the BSO members are involved in teaching, coaching, and curriculum development for the program. The winds, brass, percussion, and strings sections of the BSO work with Fellows in their areas of interest. Fellows also attend rehearsals of the BSO.

The program also includes 35 to 40 guest artists—vocalists, conductors, and composers from other top symphonies and orchestras from around the country. They are intimately involved in teaching, as well as in giving instruction and master classes. Guest artists include world-class performers in their field such as Phyllis Curtin, Elliott Carter, Peter Serkin, John Williams, André Previn, Michael Gandolfi, and Yo-Yo Ma, as well as music critic Richard Dyer. In addition to classes, rehearsals, lectures, and performances, the Fellows have the benefit of working with other cultural institutions. TMC collaborates with Shakespeare & Co., the Mark Morris Dance Troupe, and Jacob’s Pillow, furnishing Fellows an opportunity to work with and learn from actors and

BOSTON UNIVERSITY TANGLEWOOD INSTITUTE

In addition to its own education initiatives, the BSO has played a central role in the establishment and continued success of one of the country’s premier high school-level music education programs. Boston University Tanglewood Institute (BUTI), an intensive eight-week summer music school for gifted high school musicians, was established in 1967 by Eric Leinsdorf, BSO Music Director from 1962-1969. Linestorf believed that a music program for students of high school age was needed to complement the Tanglewood Music Center, which serves older students. BUTI concentrates on six specialized areas in classical music: orchestra, vocal, composition, harp, piano, and wind ensemble. Two-week workshops are also offered for other instruments such as flute, oboe, trumpet, horn, clarinet, and tuba. Each summer, the program enrolls about 370 students from throughout the U.S. and the world.

Managed by Boston University’s College of Fine Arts, BUTI engages the support of the BSO on a contractual basis. Using the Tanglewood rehearsal and performance facilities of the BSO, the program features master classes, workshops, coaching, rehearsals, and performances with 75 faculty members drawn from leading composers, instrumentalists, conductors, and vocalists at the Boston Symphony Orchestra, Tanglewood Music Center, and other top symphonies and music schools. Students also receive season passes to all BSO and TMC performances. BUTI’s relationship with the BSO makes it unique among its peers in providing such deep exposure to the highest standard of professional music making.

BUTI’s importance is reflected in the progression of its graduates, who have gone on to world-class music schools like Juilliard, Eastman School of Music, Cleveland Institute, New England Conservatory, University of Michigan, and Shepherd School at Rice University. More than a dozen are current members of the BSO. They can also be found in every major symphony orchestra in the United States, as instrumentalists, conductors and administrators, at leading opera companies, and among the most noted contemporary classical composers.



dancers and, in doing so, embellish the content and structure of their music.

Finally, Fellows in the TMC program perform 25 or more concerts each season, and they are given several opportunities to perform with the BSO and other premier classical musicians. In 2007, performances included Verdi's Don Carlo, Beethoven's Symphony No. 9, and Mozart's *Così fan tutte*. Fellows also participate in Tanglewood-on-Parade, the Festival of Contemporary Music, and hold their own special TMC orchestral and chamber music performances.

POST-SECONDARY EDUCATION

BSO and Boston Pops musicians are the single most important source of faculty members for Boston's major post-secondary music education institutions.

BSO and Pops musicians are essential to Boston's role as a center of music education, and are particularly well-represented on the faculty of three major post-secondary music education institutions: New England Conservatory of Music, Boston Conservatory of Music, and Boston University School of Music. Among faculty teaching orchestral instruments, Symphony and Pops musicians make up 60 percent of faculty at New England Conservatory, over half at Boston Conservatory, and 45 percent at Boston University School of Music. A number of BSO members also serve as faculty at the Longy School of Music in Cambridge.



MUSICWORKS

MusicWorks was founded by BSO violist Mark Ludwig in 1985. The program teaches music appreciation and offers instruction on a variety of classical music instruments to Berkshire County residents. Running from October to May, the program's intent is to bring classical music to the Berkshires after the Tanglewood season, in a way that is intimate and educational.

MusicWorks includes both music instruction and performance. With respect to musical instruction, the Artists in Residency program and master classes are very personal and give students of all ages and skill levels an opportunity to be taught by some of the most accomplished classical musicians in the field. These educational and instructional programs are usually offered in partnership with music and educational institutions in Berkshire County, including the Berkshire Music School, the Berkshire Institute for Life Long Learning, Hancock Shaker Village, Simon's Rock College, and public schools throughout the county. MusicWorks benefits from partnering with institutions that are a permanent fixture within Berkshire County's music education infrastructure. These institutions, in turn, gain from an association with BSO musicians and their colleagues in other symphonies.

5.2 Building Critical Components of the Creative Economy

The BSO is a vital force in Massachusetts' "creative economy." In the broadest sense, the creative economy describes the enterprises and people involved in the production and distribution of goods and services in which the aesthetic, intellectual, and emotional engagement of the consumer gives the product value in the marketplace. It includes the individual artists who provide the talent and creativity; the nonprofit cultural institutions and commercial businesses that take the original ideas of individual artists and produce or distribute creative goods and services; and the support system that nurtures and sustains the creation, production, and distribution of creative products and services, including the higher education institutions that help nurture creative talent.

The BSO contributes to Massachusetts' creative economy in at least five critical ways beyond its own musical performances:

- First, Symphony Hall serves as a premier venue for musical performances of the highest caliber.
- Second, the BSO and Pops bring a base of highly talented musicians to Massachusetts who establish and participate in other musical performance organizations, expanding musical offerings for residents and visitors.
- Third, BSO members have helped to develop a cluster of commercial firms that produce music-related products such as instruments, educational services and materials, and production equipment and facilities.
- Fourth, the presence of the BSO has made Boston and Tanglewood magnets for aspiring professional musicians, and has played a leading role in making Massachusetts a center of professional music education.
- Finally, the BSO's education and music appreciation programs help to build the audience that is needed to sustain the state's musical performance organizations into the future.

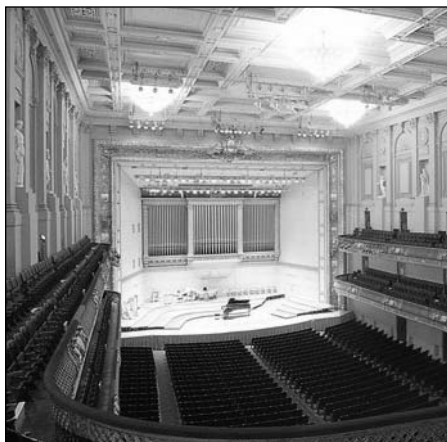
Symphony Hall is not only the home of the BSO and the Pops; it is also a venue for performances by other world-class music ensembles and performing artists.

Widely considered one of the finest concert halls in the world, Symphony Hall is a prized setting for performances by highly acclaimed orchestras and performing artists. Every year, Boston's renowned Handel and Haydn Society, which specializes in baroque and classical music with period instruments, performs the majority of its concerts at Symphony Hall. The Hall also hosts many concerts as part of the Boston Celebrity Series, featuring distinguished performing artists such as Yo-Yo Ma, Savion Glover, Arlo Guthrie, Itzhak Perlman, and Pinchas Zuckerman. Symphony Hall is also rented on a one-time basis for various orchestral and other music performances, hosting 43 outside events open to the public, with a combined attendance of almost 71,000, during the 2005-06 season.

BSO and Pops members engage in a range of additional performance activities that add to the musical offerings around the Commonwealth.

Many BSO and Pops members also perform with or direct other musical performance groups, and some have founded new groups. These groups perform not only in Boston and the Berkshires, but also in other communities throughout Massachusetts. Among the many examples are the following:

- Wendy Putnam, BSO violinist, established Concord Chamber Music Society in 2000 and continues as its director. Since its inception, the Society has established itself as one of the premier chamber music performance series in the Boston area.
- Larry Wolfe, assistant principal bass for the BSO and principal bass for the Pops, is also the music director at the James Library for the Arts in Norwell, where he directs an annual five-concert series.
- Seven of the 12 members of the Arlington-based Walden Chamber Players are current or former BSO members. Among the five other members, three have performed with the Symphony and/or the Pops, including one who is currently principal oboe with the Pops Esplanade Orchestra.
- Longtime BSO violinist Ron Knudson is also currently the music director of the New Philharmonia Symphony, which performs primarily in Newton and Wellesley. Knudson was the original violinist in Collage New Music, which performs contemporary classical music, and in 1971 helped to found the Curtisville Consortium, a chamber ensemble of BSO players and friends performing a series of chamber music concerts each summer in the Berkshires. He has also performed as a guest conductor for numerous orchestras throughout New England, including a number of stints in that role with the Boston Pops Orchestra.
- Bonnie Bewick, BSO violinist, is a member of Cambridge-based Childsplay, an ensemble of over two dozen leading musicians in traditional and contemporary fiddle music.



SYMPHONY HALL AND THE HANDEL AND HAYDN SOCIETY

The Handel and Haydn Society performs baroque and classical music for chorus and period-instrument orchestra. Founded as a choral society in 1815 by a group of Boston merchants, Handel and Haydn is among the oldest continuously performing arts organizations in the country. The Society offers a subscription series in Boston's Symphony and Jordan halls and other selected venues that reaches an annual audience of over 30,000.

The Society has enjoyed a longstanding relationship with the BSO and Symphony Hall since first performing there four days after its opening in 1900, and has continued to perform there without interruption to the present day. During the 2006-2007 concert season, it performed 15 of its 23 concerts in Symphony Hall to a combined audience of almost 25,000.

The Society's Director of Marketing and Public Relations, notes that the ability to perform in Symphony Hall has been an important factor in building and maintaining the Society's audience. "It gives added appeal to the concerts we perform there when we market our subscriptions and individual tickets. It is beautiful, has great acoustics, and has nice amenities for concert-goers." Sorenson also credits the BSO, as the area's most prominent classical music performance company, for helping to build an audience for classical music that benefits other performers.

- Fenwick Smith, recently retired BSO flutist, was a member of the contemporary music ensemble Boston Musica Viva for 13 seasons and also performed on baroque flute with early music groups. Since 1984, he has been a member of the Boston Chamber Music Society and is also a member of the Melisande Trio.
- Frank Epstein, BSO percussionist, in 1972 founded Collage New Music, a highly-regarded ensemble that performs music by noted contemporary classical composers. Over the past three decades Collage has given the first Boston performances of more than 200 works, including 80 world premieres.
- Mark Ludwig, BSO violist, also leads the Hawthorne String Quartet, which as part of MusicWorks, founded by Ludwig in 1985, provides music education programs and music performances throughout Berkshire County from September to May each year. All four members of the quartet are BSO musicians.
- Finally, BSO members have spurred the recent proliferation of chamber music performance series in the Berkshires. Perhaps the most notable of these groups is the Curtisville Consortium, founded in 1970 by BSO members and family. Nine of its 12 current members are BSO musicians.

The BSO's employment of freelance musicians provides income that enables these musicians to remain in the Boston area and enrich the area's music scene.

The BSO plays a critical role as an employer of freelance musicians. It is the largest employer of freelance musicians in the Commonwealth, with 150 part-time and substitute musicians, 95 percent of whom are Boston-based. The volume of work opportunities offered by the BSO assists local musicians to earn a living, and helps ensure that Boston will continue to draw from a deep pool of musical talent.

BSO members are involved in range of music-related commercial enterprises in Massachusetts, helping to create a significant cluster of music-related companies.

This includes musical instrument design and manufacture, musical composition and recording, development of recording technologies, and the development of music education materials. Among some of the most notable examples are the following:

- Luis Leguía, a recently retired BSO cellist, is a co-owner of Milton-based Luis and Clark, a designer and manufacturer of carbon-fiber cellos, violas, and violins. Leguía designed a cello as the company's launch product. Carbon-fiber instruments, in addition to being very durable, have the same acoustical properties as wood instruments but offer more forceful projection.
- Neil Grover, a BSO and Pops percussionist since 1978, is president of Woburn-based Grover Pro Percussion, a manufacturer of percussion instruments and accessories, including drums, tambourines, woodblocks, drumsticks, and mallets.
- Hyde Park-based Vic Firth, Inc., with annual revenues in excess of \$17 million, is the world's largest producer of drumsticks and mallets, and also sells education packs and accessories. CEO Everett Firth was a BSO percussionist for over 50 years, most of them as principal timpanist.
- Frank Epstein, BSO percussionist, is a consultant to Norwell-based Avedis Zildjian Company, maker of cymbals and accessories, on new product development, including the recently introduced Classical Orchestral Cymbal Selection.

- Somerville-based Sonic Network, Inc., a developer of audio technology and content, has over 200 sound library and music products called “Sonic Implants.” This library provides “sample libraries” to musicians and composers writing for film, TV, artist CDs, game soundtracks, and advertising. These sample libraries were produced using the sounds of the Boston Pops and Boston Ballet orchestras, and were recorded at Roslindale’s Sonic Temple (see Fenwick Smith sidebar).
- Chestnut Hill-based Air-ev Productions, which provides training and performance opportunities for professional musicians, is a co-venture of Norman Bolter, retired trombonist for the Boston Symphony Orchestra and his wife, Dr. Carol Viera, a clinical psychologist and coach for performing artists. Air-ev publishes sheet music and recordings by Bolter and instructional booklets and other writings by Bolter and Viera, and offers both home-based support, master classes, workshops, and concerts for professional development.

In addition to these examples, many BSO members produce their own CDs and write compositions for commercial use.



FENWICK SMITH AND THE SONIC TEMPLE

Fenwick Smith is one example of a BSO musician who combines his musical, technical, and entrepreneurial talents to launch or play key roles in commercial enterprises. Smith was a BSO flutist from 1978 until his retirement in 2006. For 12 years, he worked for Verne Q. Powell Flutes of Maynard, Massachusetts, a designer and manufacturer of custom flutes and piccolos. Smith plays a Powell flute he made himself.

In 1995, Smith purchased a commercial building in the Roslindale neighborhood of Boston, the top floor of which was the former Roslindale Masonic Temple. Through four years of renovation, including rewiring, soundproofing work, acoustical improvement, and the installation of silent, computer-controlled heating, air-conditioning, ventilating and humidification systems, he created a state-of-the-art recording facility. Adjacent areas on the same floor serve as control room, editing room, office, kitchenette, and lounge area. The facility, dubbed the Sonic Temple in recognition of its origins as a Masonic Temple, is operated by John Weston of Futura Productions.

The Sonic Temple is considered one of the few classical music recording studios located in a space meticulously crafted to simulate the sound of a real concert hall. Smith uses the studio for his own recording business, offering custom recording services to composers worldwide. He also rents the studio for other recordings. The Sonic Temple has proved so popular that it is open around the clock and is in constant use. Among the artists that have used the facilities are Yo-Yo Ma and James Galway.

The musical talent and the rich musical performance environment supported by the BSO are key factors in making Boston a center of music higher education.

In addition to its social function, higher education is an industry that creates jobs and income. The higher education industry is of great importance to the Boston area economy, and music education institutions contribute significantly to that industry.

The BSO plays a vital role in Boston's position as a center of music higher education, with some of the nation's leading music higher education institutions. As noted earlier, BSO musicians and former musicians comprise a very large share of faculty at the area's music higher education institutions. The high repute of BSO members who join the faculty of music higher education institutions also brings recognition and resources to these institutions. As an example, in 2005, Bradford and Dorothea Endicott initiated a five-year commissioning project to create new works for the New England Conservatory (NEC) Percussion Ensemble, directed by Frank Epstein, BSO percussionist and Chair of Brass and Percussion at New England Conservatory. The commissions are intended to revitalize the percussion ensemble repertory and to honor NEC. The project follows upon and extends the Endicotts' highly successful commissioning for NEC of Joan Tower's DNA for Five Percussion Instruments, which had its world premiere in April 2003 at Jordan Hall and was subsequently performed at the Tanglewood Music Center.

Collaborations between the BSO and music higher education institutions further enrich the educational environment. For example, in spring 2006, the BSO initiated a two-year program examining the composers Schoenberg and Beethoven. New England Conservatory offered supporting concerts that allowed listeners to probe more deeply the work of the two composers. The BSO and NEC also collaborated in a free lecture series at the Boston Goethe-Institut.

The presence of leading music education institutions, in turn, further enhances the area's musical performance offerings.

A number of school-based music performance ensembles, sometimes directed by BSO musicians, provide additional quality performance opportunities for area music lovers, often at a more affordable price than professional performances. Examples of school-based companies include Boston University Symphony Orchestra, New England Conservatory Orchestra, and various wind, brass, piano, baroque, chamber music, choral, and jazz ensembles.

These schools also present performances by faculty and other artists. For example, Pickman Concert Hall at Longy School of Music hosts over 250 musical events each season, including concerts and master classes featuring Longy students, faculty, and guest artists, as well as presentations by local artists and performance organizations. The Boston Conservatory presents over 200 performances each year, from student and faculty recitals, to fully-staged works of dance, theater, and opera, to musical ensembles.

The BSO's education and community outreach activities help to develop future audiences for classical music performances.

Activities described elsewhere in this report help young people to develop an appreciation for classical music that increases the likelihood that they will attend classical music performances as they mature into adults. These activities include elementary and secondary school music education programs, free youth and family concerts with accompanying music education and apprecia-

tion activities, and deeply discounted tickets through high school and college passes. Developing this young audience is essential to the financial survival of local music performance organizations.

5.3 Enhancing Boston's Image as a World-Class City

In today's global economy, competition among cities and regions for coveted value-added industries and highly-skilled workers is fierce. While economic competitiveness is a function of many factors, it is widely understood that the quality of life offered by a community contributes greatly to its attractiveness as a place to live, work, and do business—and that cultural environment is a key element in quality of life.

Considered one of the world's great symphony orchestras, the BSO has burnished Boston's reputation as a cultural center. The BSO and Pops are well known not only to residents and visitors to Boston and Tanglewood, but through tours and recordings have reached an international audience. Members of the Commonwealth's corporate community understand the importance of these internationally recognized cultural assets to the business environment and to their own bottom lines, as evidenced by generous corporate giving programs that keep the BSO and Pops financially sound while offering contributors the opportunity to be identified with a highly-prized world-class cultural institution.

*Through frequent high-visibility tours to major venues,
both the BSO and Pops act as "cultural ambassadors" for Massachusetts,
and reinforce the quality of the state's cultural offerings.*

The Boston Pops and Boston Pops Esplanade orchestras have performed in 43 of the contiguous United States, plus Hawaii and the District of Columbia. During John Williams' tenure, the orchestra performed in concerts at the White House and the Lincoln Memorial as part of the Pops' centennial celebration in 1985, and the BPEO performed at the Statue of Liberty on the occasion of the monument's rededication in 1986. Mr. Williams also undertook three tours of Japan.

Since his appointment in February 1995, Keith Lockhart has led the Boston Pops Esplanade Orchestra on 28 tours of the United States and four Asian tours, and he has made two Carnegie Hall appearances with the Boston Pops Orchestra. In February 2002, the Boston Pops became the first orchestra to perform at the Super Bowl. In addition to formal tours, the Pops also has numerous engagements year-round throughout New England.

The BSO undertakes frequent tours of major American cities, and performs annual concerts at New York's Carnegie Hall. The orchestra also makes periodic international tours, as in 1979 when the BSO became the first American orchestra to visit China after the establishment of diplomatic relations. The BSO's 2007 international tour covered seven cities in Switzerland, Germany, France, and Great Britain.

The BSO and Pops further raise Massachusetts' image as a cultural center through widely sold recordings and national media exposure.

The BSO and Pops have both been extensively recorded. The BSO has issued more than 750 recordings. The Boston Pops currently has a discography of more than 100 recordings. In addition, many BSO musicians issue their own recordings.

The Pops has also gained substantial media exposure. The annual Fourth of July concert from the Charles River Esplanade has been broadcast nationally on television since 1990, first on A&E Television (1990-2002) and starting in 2003 on CBS Television as the Boston Pops Fireworks Spectacular. In December 2006, PBS stations around the country carried a Boston Pops holiday compilation program that included selections from concerts conducted by Arthur Fiedler, John Williams, and Keith Lockhart. Evening at Pops, a co-production of WGBH-TV in Boston and the BSO, was broadcast nationally on PBS from 1970 to 1994, attracting an audience of nearly 40 million viewers each season.

Numerous companies gain exposure as supporters of the BSO and Pops through corporate giving programs.

The BSO and Pops received over \$5 million in financial support from companies large and small in both the Boston area and the Berkshires during the 2006-2007 season. This support reflects both a sense of philanthropic responsibility and sound business sense: the presence of world-class

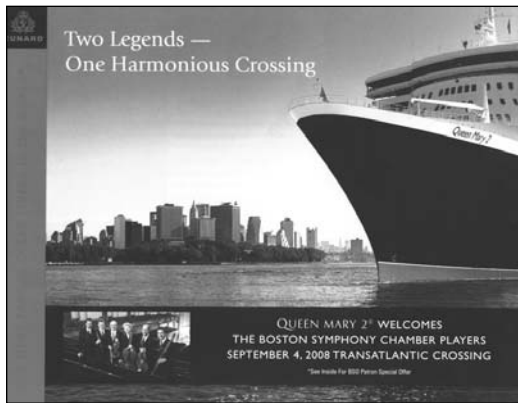
**BOSTON PRIVATE BANK & TRUST:
BSO BUSINESS PARTNER**

Boston Private Bank & Trust is a BSO Business Partner, and CEO Mark Thompson is the Business Partner Program's 2007-08 chair. Thompson strongly believes in supporting the community through corporate giving and employee involvement. While the arts is one focus of his firm's corporate giving, Thompson decided to support the BSO specifically because of its international stature and its deep engagement with the community, but he also sees a business rationale for becoming a business partner.

Describing the experience of entertaining ten clients at a recent BSO performance, Thompson recalls, "We had V.I.P. seats and a private room for a reception. Before the concert, one of the orchestra members also spent time with us. My clients all walked away wowed by the experience—they thought it was fabulous."

Reflecting on another dimension of the role of cultural assets like the BSO and Pops in creating a positive business environment, Thompson says, "It is very important to have a vibrant arts community to attract top talented professionals into the region. Without a vibrant arts community, we would not attract global talent to compete with other companies."





BSO CORPORATE SPONSORS

Many Boston-based, nationally and internationally based corporations, recognize the iconic strength of the BSO's brand in Boston (now the number five advertising marketing in the country), and have chosen to align themselves with the BSO, Boston Pops, and/or Tanglewood as a key component of their marketing efforts in Boston and the Northeast.

UBS, one of the world's leading financial firms headquartered in Zurich, Switzerland, became the exclusive sponsor of the BSO season at Symphony Hall in 2003 as part of the firm's strategy to launch its brand in the United States. In addition to the exposure UBS garners at Symphony Hall, over the last five seasons, UBS has leveraged its BSO partnership with incremental BSO-themed local and regional media campaigns that have included full page ad buys in the Boston Globe, the New York Times, and special section advertorials in Boston Magazine.

In 2007, UK-based Cunard Line became the Official Cruise Line of the BSO and Boston Pops with its sponsorship of the Boston Pops at Tanglewood Series and Tanglewood Jazz Festival. This season, Cunard and the BSO have extended the partnership to include special performances from the Boston Symphony Chamber Players onboard a Queen Mary 2® Transatlantic Crossing this September. Cunard is promoting the Chamber Players Crossing to 135,000 past passengers and over 1,000,000 prospective passengers within Massachusetts and throughout the U.S. and Canada.

Massachusetts-based EMC Corporation has partnered with the BSO for over twenty years, as a BSO corporate annual fund member, a supporter of the BSO's corporate events, A Company Christmas at Pops and Presidents at Pops, and since 1999, as a major corporate sponsor. Much like their sponsorships with the Boston Red Sox, the New England Patriots and the Museum of Science, Boston, EMC utilizes its long time partnership with the BSO to be an active corporate citizen globally through EMC's support of the BSO's last two European tours.

performing arts organizations helps to attract talented professionals who take cultural offerings into consideration when deciding where to live.

In addition to gaining positive media exposure, corporate supporters use their association with the BSO and Pops to benefit employees and build their businesses.

Corporate sponsors and business partners are given blocks of tickets to BSO and Pops concerts, which are often used as perks for employees or to entertain current and potential clients. Many corporate supporters also entertain at the Symphony Café or use Symphony Hall reception rooms for private events before and after concerts.

5.4 Serving its Local Communities

The BSO makes extensive efforts to increase access to BSO performances for underserved segments of the community.

Besides its education programs described elsewhere in this report, the BSO's primary role in serving its local communities involves providing free and/or reduced-cost access to the highest-quality classical music for a range of audiences—children, young adults, families, and elders—who might otherwise be unable to attend such performances. This includes the following initiatives:

- **Community Chamber Concert Series.** In 2006, the BSO held eight free community chamber music concerts open to the public, each in a different Boston area community. A total of 4,300 people attended these performances.
- **Community Partnerships.** The BSO has partnerships with churches and community organizations in Chinatown, Roxbury, and Worcester, which give out free tickets to family concerts. During the 2006-07 season, the BSO distributed a total of 500 BSO tickets and 200 Pops tickets through these three partnerships.
- **College Card.** The BSO offers the College Card for which college students can attend up to 16 concerts for the flat price of \$30. The BSO has made arrangements through area institutions that frequently buy them in bulk. For instance, Boston University purchased 10,000 college cards last year and MIT purchased more than 3,000 cards as a benefit for their students.
- **High School Frequent Visitor Card.** The BSO has developed a Frequent Visitor Card for high school students as well. Purchasing a \$20 Frequent Visitor Card entitles high school students to attend up to 12 BSO concerts. Since high school students are not as mobile as college students, the BSO tries to sell the cards to high schools that can then organize students to travel as a group to performances. Boston Latin, Boston Academy for the Arts, and Melrose High School are among the schools that have taken advantage of this program.
- **Rush Tickets.** BSO rush tickets are made available on the day of midweek and matinee performances at deeply discounted prices.

The BSO works to improve physical infrastructure and urban design around Symphony Hall, to the benefit of both its audiences and the community at large.

Recent initiatives have included the following:

- Renovation of Symphony Plaza, an adjacent commercial structure that the BSO purchased in the 1990s, and upgrading the retail tenant mix.
- Playing a lead role in advocating for major improvements to the Symphony MBTA station, which were completed in 2006.
- Working with local transportation officials on planning for the reconstruction of the area over the Huntington Avenue underpass.
- Working with other local music institutions and city government to designate adjacent Massachusetts Avenue as the “The Avenue of Music.” The project includes signage upgrades and other improvements.

The BSO makes Tanglewood available off-season as a resource to residents and visitors of the Berkshires beyond its music programs.

At Tanglewood, the BSO rents facilities to local high schools for performances and events at minimal charge. The grounds remain open year-round and receive a significant number of visitors, particularly during foliage season. Finally, it serves as a performance venue for other arts organizations in the area.



**BSO IMPACTS
IN OTHER MASSACHUSETTS
COMMUNITIES**

While the BSO's impacts are felt most strongly in Boston and around Tanglewood, they extend to many other Massachusetts communities. In 2006, the BSO purchased goods and services from vendors in 165 cities and towns across Massachusetts. Among communities outside of Boston and Berkshire County, one

had over \$1 million of vendor sales to the BSO, two others had over \$500,000, and 14 others had over \$100,000. Additionally, BSO members are engaged in a number of businesses based in and around Boston.

Communities outside Boston and Berkshire County also host music performances by the BSO, Pops, and music ensembles with BSO members. In 2006, the Boston Pops gave performances in five such Massachusetts communities, and BSO held eight free community chamber music concerts, each in a different Boston area community. Of particular note, the annual Pops by the Sea Concert presented by the Boston Pops Esplanade Orchestra, is considered one of the premier cultural events on the Cape. Not only does this concert attract thousands of visitors to the Cape, but the concert is the major source of funding for the Arts Foundation of Cape Cod, providing year-round funding for this diverse and thriving cultural community.

