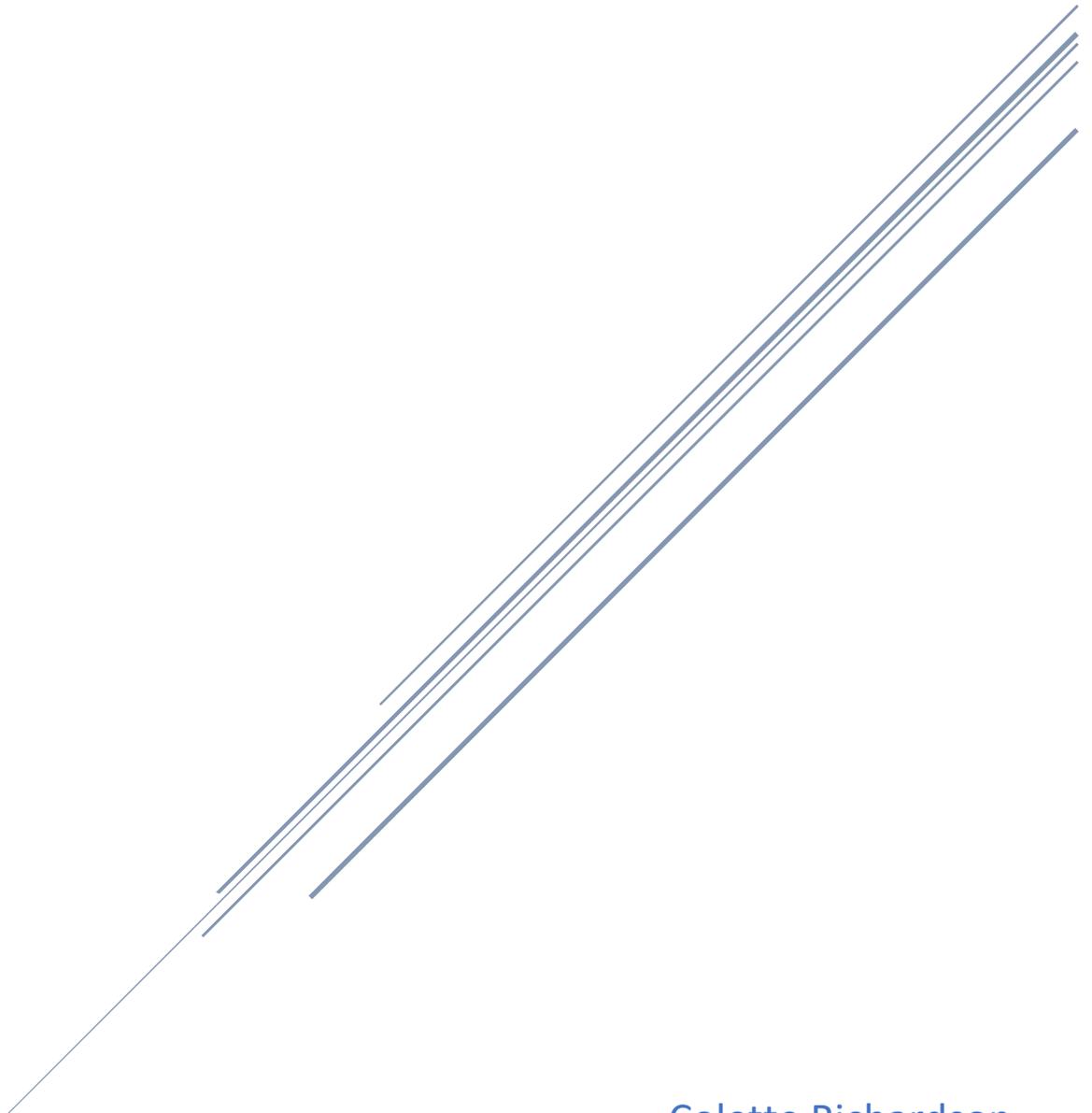


“OPPORTUNITY IS NOT A LENGTHY VISITOR”

An Analysis of Broadway Musicals by Style and Producing Type Considering Political and Economic Factors from 2000-2019



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Introduction

Since Disney's economic investment in Times Square and long-term lease and renovation of the New Amsterdam Theatre on 42nd street in the 1990s, corporations have begun to invest in the Broadway community in the form of adapting existing properties and repurposing them to stage musicals. These investments created new competition for independent theatre producers, who now had to compete with these corporations for theatres and audience members.¹ This new competition, in combination with multi-million dollar producing costs, makes the barrier to produce a Broadway musical more difficult than ever. How do these factors affect the production of musicals on Broadway and what stories they choose to tell? Who gets to decide what gets produced on Broadway and what factors impact these decisions? This paper aims to explore these questions through an analysis of the most successful musicals of the 2000-01 season through to the 2018-19 season relative to some major economic and political trends over the same time. The paper will look at the different styles of musicals present throughout this twenty-year period, and who was producing them, and comparing that data to external factors including political party in office, median household income, the stock market and the unemployment rate that may contribute to these decisions being made. The expectation is that corporate and conglomerate producers will produce fewer tragedies and tragicomedies than independent producers. Additionally that independent producers will be more likely to produce tragedies and tragicomedies successfully in stable political and economic conditions.

¹ Wollman, The Economic Development of the 'New' Times Square and Its Impact on the Broadway Musical, 2002

Literature Review

The corporate presence in arts and cultural spaces are described in the literature as both necessary and dangerous. Some, such as Schiller and Joyce, believe that corporations interfering in these public spaces creates a censorship of voices, where corporate interests are controlling cultural output, and imposing a controlled set of views onto the population that exist in their own best interests. Schiller suggests that in this way, the social culture of a community, or their shared understanding of the world and how it works, can only be defined by its economic life.² While this may be a particularly cynical view, other scholars, such as Joyce agree that increased corporate engagement in arts and cultural sectors decreases the diversity of voices present. Joyce asserts that decreased arts funding results in re-hashing stories that are already well performed, and in turn, that a lack of government funding discourages private funders from contributing to a project, resulting in an “ossified” culture that lacks diversity in voices heard.³ There is evidence to support these theories. Heilbrun’s research concerning the repertory diversity of American opera companies concluded that as a newer organization ages, it is more likely to produce pre-20th century works, likely due to producers being unwilling to support contemporary or new works.⁴

However, not all scholars support public funding for the arts. Banfield notably disagrees with the anti-privatization of artistic spaces argument, asserting that those who consume art tend to be from a higher social class, and wealthier than the average citizen, and public support for art is

² Schiller, Culture Inc, 1991.

³ Joyce, GOVERNMENT FUNDING OF CULTURE: WHAT PRICE THE ARTS?, 1984

⁴ Heilbrun, Empirical evidence of a decline in repertory diversity among american opera companies 1991/92 to 1997/98, 2001.

sending funds in the opposite direction, using public funds to benefit an exclusive elite.⁵ Banfield argues for more private engagement with these sectors, suggesting that turning arts and culture into free market systems will allow for public funds to be allocated more directly towards those in need.⁶

Dorn notes two major paradigm shifts as a result of this debate: the first being that not-for-profit arts organizations are rebranding as cultural organizations, and shifting their missions towards diversifying voices on a wider cultural level, rather than focusing on the creation or development of new artistic works; the second, an increased focus on sales and consumer focused choices when planning seasons or exhibitions.⁷ With this, comes questions surrounding who best represents the public interest – governments, or private corporations?⁸

These questions are fully present in today's Broadway climate. As Wollman discusses, since the economic development of Times Square in the 1990s, multi-national corporations such as The Walt Disney Corporation, and Fox Searchlight have begun to enter the Broadway scene.⁹ These corporations have vaster economic resources and are able not only to afford bigger budget production elements, but are able to keep their productions running longer than their independently produced competition, increasing the likelihood they'll be able to recoup their initial investment, particularly as the cost of developing and operating a new show continues to

⁵ Banfield, *The Democratic Muse: Visual Arts and the Public Interest*, 1984

⁶ Banfield, *The Democratic Muse: Visual Arts and the Public Interest*

⁷ Dorn, *Privatization of the Arts and the Public Interest: An Issue for Local Arts Agencies*, 1995

⁸ Dorn, *Privatization of the Arts and the Public Interest: An Issue for Local Arts Agencies*

⁹ Wollman, *The Economic Development of the 'New' Times Square and Its Impact on the Broadway Musical*

grow.¹⁰ This phenomenon, as Wollman describes it, isn't new, but hasn't existed on this financial scale, and is pushing smaller and more unconventional work into smaller theatres that physically cannot fit enough patrons to make enough in nightly ticket sales to stay open, which then pushes less commercial work out of the market entirely.¹¹

Thomas's study on originality of new musical theatre based on composition of producing team affirms this theory. It finds that diversified corporate musicals (shows with a production team that includes at least one independent producer, and one theatrical conglomerate, such as the Shubert, Nederlander or Jujamcyn Organizations) run longer and make more money than independent musicals (musicals with a production team comprised of only independent producers and non-profits), despite independent musicals being the most likely to be comprised of entirely original content.¹² Diversified corporate musicals and Corporate musicals are often stage adaptations of pre-existing film properties, which despite having an original book and score, rarely include any significant story changes.¹³ These shows also have a higher likelihood of winning awards and having strong critical reception, making the success of an Independent Musical, without the financial resources, title recognition or awards boost, significantly more difficult, if not nearly impossible.¹⁴

¹⁰ Wollman, *The Economic Development of the 'New' Times Square and Its Impact on the Broadway Musical*

¹¹ Wollman, *The Economic Development of the 'New' Times Square and Its Impact on the Broadway Musical*

¹² Thomas, *When Disney Came to Broadway: Assessing the Impact of Corporatization in an Art World*, 2019

¹³ Thomas, *When Disney Came to Broadway: Assessing the Impact of Corporatization in an Art World*

¹⁴ Thomas, *When Disney Came to Broadway: Assessing the Impact of Corporatization in an Art World*

Some elements that contribute to the success of musical productions on Broadway require high investment costs. Both Gates¹⁵ and Simonoff and Ma's¹⁶ studies emphasize the importance of Tony Award recognition in the financial success of Broadway musicals – specifically winning awards, with nominations that do not result in award wins often resulting in negative results at the box office. Gates also notes the importance of celebrity casting, with performers with some degree of notoriety having a large contribution to increased box office returns. The size of theatre is also a factor, with larger venues having the capacity to sell more tickets, and therefore turn a bigger profit.¹⁷ This causes Gates to note that with escalating production costs, it is becoming increasingly perilous to produce riskier work, and that producers without significant investment capital will struggle to get any project off the ground, giving those with larger operating budgets and more dispensable resources a significant advantage.¹⁸ According to Broadway producer Ken Davenport, the average cost to develop and open a Broadway musical is \$9.66 million USD, with an additional average weekly operating cost of approximately \$590,000 USD¹⁹, costs which simply cannot be met and maintained without access to significant financial resources.

¹⁵ Gates, Moneyball On Broadway: A Statistical and Economic Exploration of How to Succeed on Broadway Without Really Trying, 2013

¹⁶ Simonoff and Ma, An Empirical Study of Factors Relating to the Success of Broadway Shows, 2003

¹⁷ Gates, Moneyball On Broadway: A Statistical and Economic Exploration of How to Succeed on Broadway Without Really Trying

¹⁸ Gates, Moneyball On Broadway: A Statistical and Economic Exploration of How to Succeed on Broadway Without Really Trying

¹⁹ Ken Davenport, The Producer's Perspective

It seems the current system favours corporate producers with more money to spend, and allows for them to continue to make considerable profit off of their productions, while pushing smaller, riskier and more independent productions out of the market entirely, resulting in fewer voices having the resources needed to produce theatre on this commercial scale in what is the Mecca of the musical theatre genre.

There are some exceptions however, which are worth noting and which can be used to pose the question, under what circumstances does the opportunity exist for independent, smaller, riskier or less utopian shows to achieve the same kind of critical and financial success or at least the opportunity to stage a musical on Broadway?

Methodology

This research aimed to answer three questions: (1) Does the composition of the producing team²⁰ affect the style of a musical theatre show? (2) What is the composition of producing teams with productions on Broadway annually? (3) What external factors contribute to a particular style of show or producing team being successful?

Data was collected for the 2000-2001 season through to the 2018-2019 season, to follow trends that may have emerged after the corporate introduction into the Broadway space discussed by Wollman following the economic development of Times Square.²¹ In each season, the top five

²⁰ Producing Team: the individuals financially backing a show, usually responsible for the business and managerial side of a show. Makes final decisions regarding both creative and financial choices.

²¹ Due to Broadway seasons running June 1st-May 31st and government data being calculated by calendar year, non-show related data will be counted for the year in which the season began. Therefore, the external factor data for the 2004-2005 season will be from 2004.

shows were analyzed. A show's success was determined by a composite score that awarded one point for each of the following: being in the top 5 highest grossing shows, having the top 5 highest capacities²², being nominated for a major Tony Award²³, with an additional point for a Tony Award win.

It is worth noting that certain “juggernaut musicals” such as *The Lion King* and *The Phantom of the Opera* became outliers due to their consistent financial dominance for years after they had originally opened. Due to these outliers, shows were only considered in the season in which they originally opened so that trends could be observed.

Shows were categorized based on two criteria: style of show, and producing team. Style of Show was broken down as such, based on Patrice Pavis' definitions in *Dictionary of Theatre*: (1) Comedy: “has characters of humble origins, a happy ending, and is intended to make its audience laugh”; (2) Tragedy: “a play portraying a disastrous human action, often ending in death”; (3) Tragicomedy: “a play with both tragic and comic elements.”²⁴

Producing Team was defined by Thomas's definition: (1) independent: all members of producing team either not for profit, or independent individual producers or producing groups; (2) diversified: at least one member of producing team is a theatrical conglomerate such as the Shubert, Nederlander or Jujamcyn Organizations;(3) corporate: at least one member of producing team is a large corporation or wing of a corporation with multiple non-theatrical holdings.²⁵

²² Percentage of the theatre's total capacity that is filled

²³ Best Musical or Best Revival respectively

²⁴ Pavis, *Dictionary of Theatre: Terms, Concepts and Analyses*, 1998

²⁵ Thomas, *When Disney Came to Broadway: Assessing the Impact of Corporatization in an Art World*

External data consisted of political party in office, as well as annual median household income, state of the stock market (DOW), and unemployment rate. Political party was considered due to the political nature of what topics may or may not be censored or debated in mass-entertainment. Economic data was considered due to the impact a changing economy might have on a producer’s ability to fund the multi-million-dollar production costs required of producing a Broadway musical.

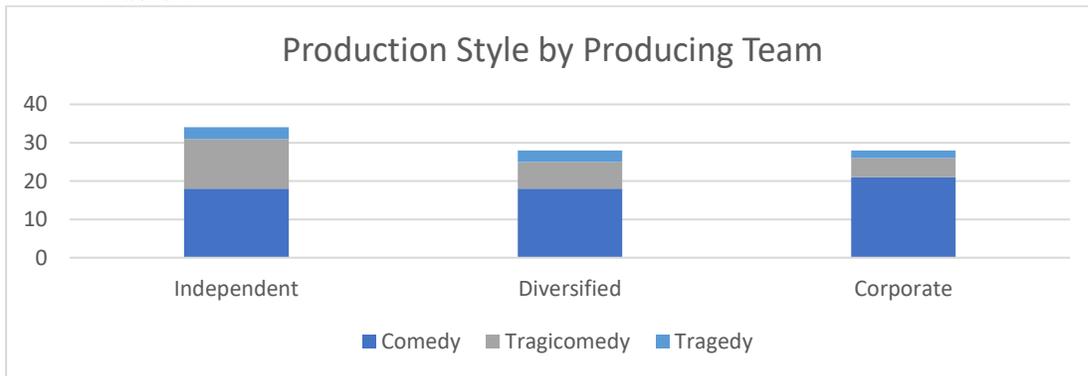
Results

1. Does the makeup of the producing team affect the style the show is likely to take?

As anticipated, independent producers’ content was a tragedy or tragicomedy 48% of the time, compared to 32% for diversified producers and 22% for corporate producers.

Independent producing teams are more likely to produce non-comedic content (Table 1).

Table 1



2. What is the makeup of producing teams in the average year on Broadway?

Independent producers are the dominant producing team²⁶ only 16% of the time, and were tied for the most dominant producing team only 36% of the time, compared to diversified and

²⁶ Producing more shows than any other type of producing group that season

corporate producers who were dominating or tied for domination 47% of the time each. Between them, diversified and corporate producers shared 72% of the total market share of musicals produced. Independent producers produce fewer successful shows annually than diversified or corporate producers on average.

Exceptions were in 2006-07, 2007-08 and 2012-13 seasons, where independent producers dominated, producing 67% percent of shows those years on average.

3. What external factors may contribute to a particular style of show or producing team being successful?

Democratic administrations saw 66% comedies, 22% tragicomedies, and 11% tragedies, while Republican administrations saw 70% comedies and 30% tragicomedies. Republican administrations are more likely to see comedies, and far less likely to see tragedies than Democratic administrations. It is possible that this may be due to New Yorkers, who traditionally vote Democrat, feeling more comfortable discussing difficult topics under Democratic administrations, as they feel more secure, and less at risk of losing social safety nets and liberal policies.

Additionally, in all years in which independent producers were the dominant producing group, the unemployment rate, median household income and the DOW had all improved since the year prior. However, not all years in which the economic state improved saw a majority of independent producers launching Broadway shows.

Discussion

The data indicates that corporate and conglomerate producers are producing the large majority of Broadway musicals, with less activity from independent producers. One possible explanation for

this is the high financial barrier to entry, with high costs to mount and run a musical on Broadway. Significant resources are required to mount a production of this scale, and with corporations and theatrical conglomerates with significantly more access to resources competing against independent producers without the same access, what occurs is an oligopoly of sorts where the majority of musicals produced on Broadway involves one or more of the major corporate Broadway producers: Disney, Fox, and Universal, or the three major theatrical conglomerates, Jujamcyn, Nederlander or Shubert. This means that Broadway musical productions are predominantly decided by these six organizations, which limits the diversity of voices in storytelling in the Broadway arena.

In addition, data for the purposes of this paper had to limit shows to being counted only in the year in which they opened, due to the overwhelming domination of a handful of juggernaut shows throughout the past twenty years, some of which opened prior to the start of the millennium. Even beyond these findings, the bulk of revenue coming into Broadway is owned by the producers of a select few shows, many of whom have been running since the 80s or 90s without significant changes or updates.

It is unclear if these organizations are attempting to censor and control public discourse through this domination as Schiller suggests. In fact, given the variety of titles produced by these organizations, evidence available suggests this is not the case. However, Joyce's warning about an "ossified" culture lacking diversity rings true. These organizations are predominantly producing comedic works that do not tackle relevant social issues. The juggernaut shows define the conversation, many of whom have not been changed or updated since they opened over twenty years ago, leaving the conversation stuck twenty years behind our current times.

To answer Dorn's question: it seems as though the corporations and conglomerates are not operating in the best interests of the public, but rather the best interests of the bottom line. Comedic musicals have their place, but Broadway needs to encompass a wider variety of stories, including those that may be tragic or uncomfortable in order to properly reflect its society. These stories are usually told by independent theatre producers, and therefore, we must continue to make space for them to succeed in this competitive industry.

Conclusion

A focus on turning a profit is understandable given the economic challenges of producing work at this level, but we must then ask ourselves, to what outcome? If our cultural institutions continue to produce work that is primarily focused on turning a profit and choose not to open a discourse on the issues impacting us as a society, then where will these dialogues take place? If we cannot go to the theatre to better understand our world and each other, then where can we go to have these discoveries? If our storytelling mediums are no longer telling the stories that confront us daily, then where will we be able to record our shared experiential history?

Broadway musicals have a wide audience appeal, and are thus well suited to being a meeting point between audiences from different belief systems. There is much potential for Broadway musicals to make a social impact, however, due to corporate and conglomerate interests, they are not currently doing so to their fullest potential.

In all fairness, many corporate and conglomerate producers have and continue to produce thought provoking work, and many comedic works raise interesting and complex questions that inspire discourse. However, these pieces are far less common than they ought to be.

If we are going to avoid the cultural stagnation that Joyce describes, we are going to need to diversify the voices producing musicals on Broadway.

But how can we begin to accomplish this? The answer possibly lies in greater public funding for the arts, from the developmental stage to the Broadway arena. The bulk of independently produced Broadway musicals were produced with the assistance of a major non-profit organizations²⁷. In order for independently produced musicals to be able to compete with the corporate and conglomerate resources, they must have access to the kinds of funds needed to develop and mount musicals from a variety of different voices. In providing increased public funding for the arts, and personally supporting non-profit theatre producers through donation and patronage we can increase the diversity of voices appearing on our stages, and ultimately, have a Broadway stage that more accurately represents us as a culture. “Opportunity [may] not [be] a lengthy visitor”²⁸, but “impossible things are happening every day.”²⁹

²⁷ Theatrical Index

²⁸ Sondheim, *Into the Woods*

²⁹ Rodgers and Hammerstein, *Rodgers and Hammerstein’s Cinderella*

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