DOLLARS AND CENTS

A TALE OF FOUR BUDGETS

If you want to put on a show, you need a budget; even living room and charity productions require the careful allocation of time and of in-kind donations.

To illuminate more clearly the economic decisions that theater administrators face, we obtained the actual pre-production budgets from four shows that have run within the past several years, and we compare them at right, category by category. We chose budgetarily diverse shows, from a $7,500 off-off-Broadway play to a $2 million Broadway straight play, and we strove to find budgets that were representative at each level.

Of course, there's no such thing as a "typical budget." Each show faces different circumstances; in footnotes, we explain several key variances in production conditions. Also, the biggest economic barrier for many theater groups—that of renting affordable space [see "Small Companies Squeezed by High Rents"]—is often accounted for in annual company budgets, and may not be reflected at right. Where included, rent expenses are categorized in the Rehearsal Space category.

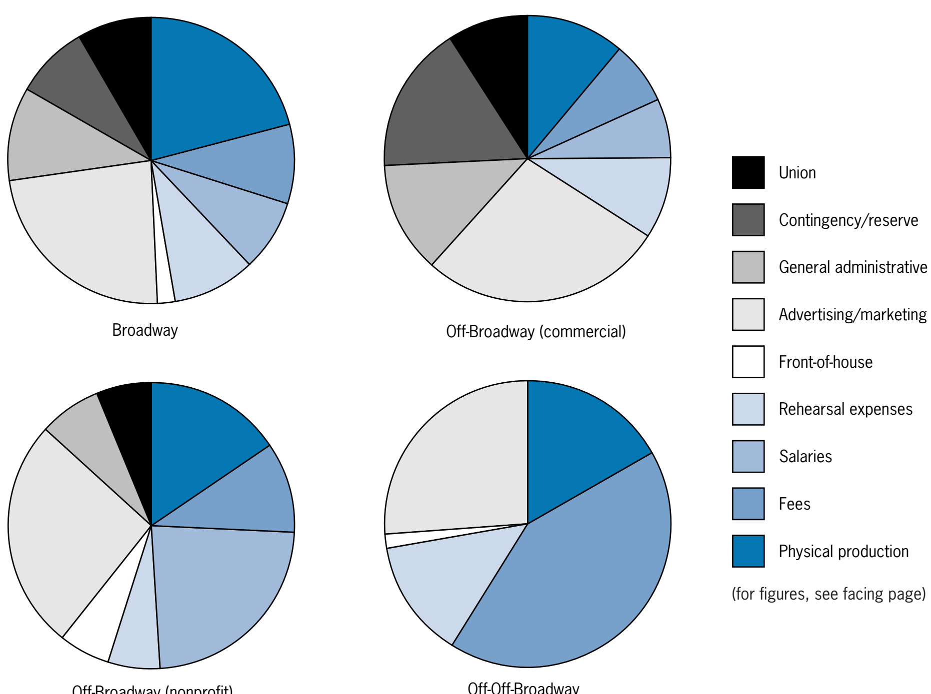
For added insight, we've interviewed the general managers for the listed productions; like the shows we looked at, their names are not being published. These interviews, combined with the data in this comparison, suggest some striking conclusions:

• Generally, the biggest expense categories for a show are Advertising/Marketing and Physical Production. Between them, these items make up about 40 percent of a typical budget. Within the Physical Production category, scenery is the largest expense, consuming 12.5 percent of the entire Broadway budget and 8.2 percent of the off-Broadway budget.

• One way this survey's off-off-Broadway show reduces expenses is by not paying its actors—even though some of them are members of Actors' Equity. Small nonprofit productions may use unpaid Equity actors under the Showcase Code provision, so long as they're mounted in a theater no larger than 99 seats. If not for this provision, the show would never be able to afford Equity actors.

HOW THE PIE IS SLICED

EXPENSE BREAKDOWN FOR FOUR NEW YORK PRODUCTIONS



(for figures, see facing page)

National Arts Journalism Program, 2002

Production type	BROADWAY		OFF-BR (COMMERCIAL)		OFF-BR (NONPROFIT)		OFF-OFF-BROADWAY	
Capacity	1,350 seats		287 seats		165 seats		60 seats	
Length of run	Open-ended		Open-ended		56 performances		15 performances	
Ticket price	$25-$70		$47.50-$50		$40		$15	
	$	%	$	%	$	%	$	%
Physical production	$418,250	20.9%	$66,500	11.1%	$34,050	15.5%	$1,250	16.7%
Scenery	$250,000		$37,500		$18,000		$900	
Costumes	$50,000		$7,500		$2,000		$250	
Lighting	$50,750		$11,000		$3,000		$100	
Fees	$179,300	9%	$42,789	7.1%	$22,500	10.2%	$3,150	42.1%
Director	$50,000		$9,138		$3,800		$1,000	
Author	n/a[1]		$7,000		$3,600		$0	
Designers	$100,300		$14,388		$10,000		$1,300	
Salaries	$161,288	8.1%	$40,050	6.7%	$51,180	23.3%	$0	0%
Actors	$75,120		$24,000		$23,760		$0	
Understudies	$30,048		$2,108		$0		$0	
Stage management	$36,670		$5,958		$9,770		$0	
Rehearsal expenses	$187,000	9.4%	$55,100	9.2%	$12,900	5.9%	$1,000	13.4%
Stagehands, load-in	$130,000		$15,250		$11,500		$0	
Rehearsal space (rent)	$13,000		$5,000		$0[2]		$1,000	
Workshop expense	$0		$28,500		$0		$0	
Front-of-house	$40,000	2%	n/a[3]		$12,730	5.8%	$120	1.6%
Box office	$40,000		n/a		$9,460		$0	
Programs	$0[4]		n/a		$750		$120	
Advertising/marketing	$469,000	23.5%	$165,500	27.6%	$57,300	26.1%	$1,955	26.1%
Publicist	$8,000		$5,500		$2,400		$1,000	
Opening night	$60,000		$7,500		$2,500		$0	
General admin.	$211,162	10.5%	$75,459	12.6%	$15,423	7.2%	$0	0%
Payroll taxes	$28,778		$10,727		$9,323		n/a	
Insurance	$25,000		$5,000		n/a[5]		n/a[6]	
Legal	$20,000		$16,000		$0[7]		$0	
Contingency	$166,500	8.3%	$100,000	16.6%	$0	0%	$0	0%
Union bonds	$167,500	8.4%	$54,602	9.1%	$13,678	6.2%	$0	0%
Actors Equity	$150,000		$27,882		$11,014		$0	
ATPAM	$10,000		$2,740		$0		$0	
Total (pre-opening)	$2,000,000		$600,000		$219,761		$7,475	
Per-week expenses	$223,281		$50,000		$5,000-$11,000		$937.50	

[1]No author expense because play is public domain
[2]Company pays annual rent
[3]Front-of-House expenses accounted for under other categories
[4]Programs are free unless color or additional pages are added
[5]Included in annual company budget
[6]Included in annual company budget
[7]Services donated in-kind

National Arts Journalism Program, 2002

•The downside of this Showcase provision is that if a small show using donated Equity labor winds up being successful, it can run no more than 16 performances. Beyond that, it must be transferred to another theater where it must pay Equity rates to its cast. It is difficult to get much steam behind a show in just 16 performances, especially since reviews of off-off-Broadway productions rarely appear before the middle of a run.

•This off-off-Broadway show cannot afford print advertising. It relies primarily on listings and reviews—and therefore on the whims of the city's entertainment editors.

•Given a budget five times larger, this off-off-Broadway managing director said he would increase advertising spending more than that of any other category. But in a 60-seat theater, the company couldn't hope to recoup five times the expenses, so it would have to move to a larger theater. But not too much bigger, because most 100-plus-seat theaters are union houses, which would entail much higher expenses. As a result, there exists a budgetary "no-man's land" between about $25,000 (the high end of non-Equity productions) and $150,000 (the low end of Equity productions).

For productions, there exists a budgetary "no-man's land" between about $25,000 and $150,000.

•This off-off-Broadway company doesn't depend much on in-kind support because getting free goods and services is a headache, often costing more in the long run in wasted time and labor. It does use a few donated set pieces and some volunteer front-of-house labor.

•Ticket prices—topping out at $40 for the nonprofit off-Broadway show and $65 for the Broadway show—can be misleading. When theater memberships, student discounts and comps are factored in, the take for the average "$40" ticket is just $20 to $25. And many Broadway and off-Broadway shows alike land eventually at the Theatre Development Fund's TKTS booth, where day-of-show tickets are sold at a 50 percent discount.

•Union costs are codified according to various factors, including the budget size, the theater's for-profit/nonprofit status, and whether the play in question has been recently produced by another company.

•This nonprofit off-Broadway budget does not include contingency money to cover general cost overruns, poor advance sales and the like. Any shortfall is made up from the company's annual budget. This Broadway production's contingency budget, though it comprises nearly 10 percent of the total budget, is low compared to others on Broadway.

•Once these Broadway and commercial off-Broadway shows opened, the author, director, designers and producer each received "points": percentages of revenue. The Broadway budget designates a total of 16.5 points; the commercial off-Broadway budget, 13 points.

•As a result of discounts and all of the above factors, recoupment of pre-production expenses—breaking even—is a challenge. This off-off-Broadway production had to sell 85 percent of its tickets to do so, and comps ate into that very small margin of error. (Productions are an acknowledged money-loser for the company, which operates a space used also by two affiliated groups. The company is able to remain viable through space rental and co-productions in which it supplies the space and marketing and others supply the production.)

•This nonprofit off-Broadway company's productions generally earn ticket revenues between $10,000 (for a bomb) and $45,000 (for a smash) a week. Given an eight-week run and weekly mid-run production expenses of $5,000 to $11,000, it's pretty rare to recoup the pre-production cost. This is despite the fact that 1) legal services are donated by board members and 2) this company has its own performance and rehearsal space, which saves a big chunk of money in a budget category that's a large concern for similar off-Broadway companies.

•This commercial off-Broadway show needed full houses for 18 solid weeks or 55 percent houses for more than two years to break even. In its two-year run, it did not break even, though future sales of film, foreign and other ancillary rights may eventually tip the show into the black. ■

LABOR VERSUS MANAGEMENT: A TUG OF WAR

Next only to "critics," no word is more polarizing in the New York theater-production world than "unions." Stage unions take the rap for skyrocketing costs, for enforcing regulations that strangle creativity and for generally keeping the industry mired in the past. While these sweeping charges may contain bits of truth, they oversimplify myriad and intricate relationships btween labor and management. The League of American Theatres and Producers likes to advertise theater on the Great White Way as "Live Broadway." Yet live theater, by definition, is a labor-intensive art form; without human labor, there can be nothing "live" about it.

Unions have played a major role in shaping the American theater from the late 1890s, especially in the traditionally labor-friendly city of New York. The International Alliance of Theatrical Stage Employees (IATSE), the U.S. and Canadian union that includes stagecraft, motion picture and television production employees, is the oldest among them; it was founded in 1893 and now has 500 local chapters. It forged an alliance early on with the American Federation of Musicians, which formed in 1896. AFM now has 110,000 members in 250 locals.

Actors' Equity Association was not founded until 1913, and it struggled considerably in the face of alliances linking theater owners with competing unions. Many of Equity's 43,000 current members also belong to at least one of its sister unions, the Screen Actors Guild and the American Federation of Television and Radio Artists. The Society of Stage Directors and Choreographers (SSDC), founded in 1962, is considered the "baby union." Its 1,700 members are employees and, frequently, royalty-holders, a combination that can be highly problematic. Although there have been periods of cooperation, theater unions often clash with one another and generally decline to join one another's pickets. Many national tours of Broadway shows that shun Equity or the AFM, for instance, have the full blessing of the SSDC and IATSE.

On the surface, the financial crisis in New York theater that followed the Sept. 11 attack brought labor and management groups together. That cooperation offers some hope for solving other long-range problems. The major Broadway unions made four-week salary concessions of up to 25 percent that helped keep seven shows open that might otherwise have closed. Several weeks later, the producers began to make good on their promise to pay back the lost wages as theater attendance returned to near-normal levels more quickly than anticipated.

But some union representatives began to grumble that producers were riding out the crisis on the backs of their actors, musicians and stagehands. "The definition of collaboration, or so it frequently appears, is when the union gives," griped Equity President Alan Eisenberg. "One might ask, for example, with the millions of dollars that some of these shows have made—such as 'Rent,' such as 'Les Miserables,' such as 'Phantom'—why do [producers] have to ask for cuts from the unions and the guilds when they have made millions and millions of dollars over the years?"

How much cooperation will remain in the near future is uncertain, especially as more systemic and deeply rooted issues reemerge as central concerns. There are currently several key struggles between management and labor that will help shape the future of the theater in New York City. One relates to cutbacks in labor for touring shows, which could easily seep into New York as new technologies gain influence and cost-cutting remains paramount. Another involves how much actors should be paid for performing inside the Broadway box even if the show in question is produced by a nonprofit entity. A third addresses the ownership of intellectual property, such as a director's stage directions.

Here's a quick glance at these issues and their possible implications.

MUSICIANS OR MACHINES?

An ongoing issue that divides actors' and musicians' unions from management is the "virtual pit orchestra," a device designed, built and programmed by Real Time Music Solutions of New York. Essentially, it's a synthesizer loaded with pre-recorded music samples. Unions call it "karaoke theater," a graceless replacement of live musicians that's the latest example of the decline of the American art form known as the musical. Management prefers the term "orchestra enhancement system," and says it's the best technology now available to pit musicians. No matter the terms used to describe the device, it drew pickets last season by AFM members wherever the non-union tour of "Annie" (which used this device) played. The clash could very well be a harbinger of Broadway's future. The virtual pit orchestra is but one of the multimedia gadgets that producers in New York and elsewhere are considering to juice up the theatrical experience and cut costs.

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Cleveland is also a union town, and thanks to the presence of the Cleveland Orchestra, the city's local chapter of the AFM is one of the strongest in the country. But that didn't make much difference when "Annie" came to town: Even picketing by local musicians did not keep patrons from lining up to pay full price to see a little red-headed girl sing "Tomorrow" to the accompaniment of an eight-member non-union orchestra and that notorious synthesizer.

"It by no means was meant to replace the orchestra," "Annie" music director Kep Kaeppler said of the machine. "It was designed to do what [electronic] keyboards do, but with a great sense of musicality. We can layer more instruments and get a more full sound. We have complete control over tempo, dynamics, entrances and cutoffs, to keep the show a live experience. We can even vamp."

Mell Csicsila, a Cleveland-area cellist who often plays in pit orchestras for touring shows, said the device is the beginning of the end of live theater. "It's basically a Sony PlayStation orchestra. This is canned music," he said. "It's a profit decision, not an artistic decision. If they get away with this, at this level, how long will it be before they get rid of live musicians altogether?"

THE FADING LINE BETWEEN BROADWAY AND REGIONAL THEATER

Theatergoers may think they are seeing Broadway shows when they buy tickets for "The Invention of Love" at the Lyceum Theatre, "Contact" at the Vivian Beaumont or "Betrayal" at the American Airlines Theatre. They're advertised as Broadway shows, and they can be nominated for Tony Awards.

But Harry Weintraub, legal counsel for the League of Resident Theatres (LORT), the trade association representing 75 major regional companies, gets paid to draw a finer line. "These are all LORT houses. It is not helpful to call them Broadway houses. Commercial plays are not produced in them. To call them Broadway would betray a certain understanding of what they do. They are Tony-eligible houses, but that is a marketing issue and not a labor issue."

Weintraub is adamant because there's significant money at stake. Equity actors at LORT theaters make a minimum of $500 to $725 per week depending on the size of the theater, compared with $1,252 on Broadway for "production scale." Although most people think of LORT houses as operating in places like San Diego, Cleveland and Seattle, three such theaters operate in New York: Lincoln Center, the Roundabout and Theatre for a New Audience. Two of those, Lincoln Center and the Roundabout, operate in their own theaters, located within what is known as the Broadway Box. A fourth will be added when the Manhattan Theatre Club, which is renovating the Biltmore Theatre, becomes a LORT member.

Weintraub's distinctions, however, don't mollify Alan Eisenberg as he pleads his case for Equity's 40,000 members. "Our mission is to make things easy, but we don't want to get [expletive] in the process. Our main concern, our only concern, is: 'What's the fair share for the artist?'" To Eisenberg, "A show that is Tony-eligible is a Broadway show, and the actors in it should be paid at production scale."

Particularly contentious are shows produced by a LORT theater in a venue that is traditionally considered a commercial site, such as Lincoln Center's "Invention of Love" at the Lyceum and Roundabout's "Follies" at the Belasco.

"The LORT houses that operate inside the Broadway box do things that no commercial producer would do," Weintraub said. "Look at Roundabout, doing 'Follies' in the Belasco. That would be insane for a commercial producer because it's not a very big theater [1,018 seats] and it's located on the eastern fringes. But for artistic reasons, that was where they wanted do the show, which is set in a dilapidated theater. If the Roundabout were treated like a commercial theater, it would go out of business."

Another thorny issue arises when a show transfers from a LORT theater into a commercial house, and not just when the nonprofit resident theater is in New York. More frequently, shows are coming in from regional houses in Chicago, San Diego and Houston. Recent transfers from LORT theaters to Broadway include "The Full Monty" (San Diego's Old Globe Theatre) and "One Flew Over the Cuckoo's Nest" (Chicago's Steppenwolf). Generally speaking, actors get a raise when a show makes such a move, but Eisenberg would like to see actors getting a greater share in the profits at a commercial house for their cheaper work early on.

"Is the artist entitled to anything when you go from LORT to Broadway?" Eisenberg asked rhetorically. "Now, there's a $1,000 bonus [for each member of the company]. Is that fair? The producers are doing inexpensive research and development, but what are the artists getting out of it? The producers will say, 'They're getting a job.' We need to recast the artist as a participant in the creative process, not 'labor.' I sometimes think it was the worst thing for actors to have formed a union in 1913 and forever be branded as 'labor.' The LORT theaters where many of these shows started are getting a royalty. I don't understand why the cast as a unit cannot get 1 percent of the royalties."

Weintraub, on the other hand, warns that if commercial producers are further discouraged from bringing new shows and risk-taking revivals from LORT theaters to commercial houses, Broadway will be a less interesting place and fewer jobs will be available. "We treat the Broadway box as some kind of holy place. It's a very large district, and it would be healthier if there were a mosaic of theatrical productions in it and not just commercially developed shows. But everyone wants you to play by their little set of rules, so we see the commercial producers dragging every musical revival out of the closet, no matter how bad. Meanwhile, Equity keeps beating its tom-tom about employment in the Broadway district."

WHO OWNS STAGE DIRECTIONS?

Money and working conditions are not the central concerns for the Society of Stage Directors and Choreographers, whose members by most estimates are sufficiently compensated. But a conflict looms over a complex set of issues involving intellectual rights. Though the SSDC is a union, executive director Barbara Hauptman said the situation is complicated "by the fact that directors and

INSIGHTS FROM THE CONFERENCE

"All small cultural organizations are extremely vulnerable. Income in the late 1990s rose 24 percent for the largest groups, but fell 12 percent for the smallest." - *Randall Bourscheidt, president, Alliance for the Arts* choreographers are contractors, employees *and* royalty participants. Our members own the property rights to the material."

Stickier still is the union's claim that a director's staging is protected in the same manner as are a writer's words. The most famous case involves a 1996 production of "Love! Valour! Compassion!" in Boca Raton, Fla. A non-union director essentially replicated SSDC member Joe Mantello's original Broadway stage directions. The non-union director went so far as to come to New York and measure the Broadway stage and settings. The union sued. "This whole thing has caused a huge controversy between us and the Dramatists Guild," Hauptman said.

Some of the theater unions will be forced to make an unpleasant choice: make concessions, or cease to exist in their current form.

The question is this: Do the stage directions, which traditionally are written down by the stage manager and often published in the script used by regional and amateur theaters, belong to the director or the playwright? "The guild believes that anything done in a production ultimately belongs to the playwright," Hauptman said. "The director may add to or facilitate, but that work only enriches the play, and that belongs to the playwright. We have never said we want to copyright, 'Enter stage right,' or 'Exit stage left.' But we do want to protect the rights of our members."

Stephen Sultan is president of Dramatists Play Service, whose profits are equally shared by the Dramatists Guild and agents representing writers. He disagrees with Hauptman. "I think it is fair to say the playwrights are the copyright holders," Sultan said. "Directors hold no copyright on stage direction. Sometimes, but by no means always, a director will get a financial end for stage directions, but that is really up to the writer to decide. That's why writers still come to work in the theater. In the theater, writers control the business. They sell the rights."

Hauptman is forced to agree, to a point. "This is still a playwright's business and not a director's. 'Death of a Salesman' is billed as an Arthur Miller play, not a Robert Falls play. And that is the way it should be. But we are starting to see changes." In one such example, playwright Paula Vogel liked Mantello's direction of "The Mineola Twins" so much that she gave him 5 percent of all royalties to put his stage directions in the published script.

Might we see directors and choreographers demanding rights for their work? Intellectual property law is a mushrooming area of litigation, in the arts and elsewhere. As judicial precedents are set, directors and choreographers may begin to press their cases more vigorously.

LOOMING TENSIONS

These are three of labor's more contentious issues, but others emerge from time to time. Two reforms Equity has pushed for recently are increased health insurance for union members (coordinated through the Actors' Fund, but with insufficient support from producers, according to Eisenberg of Equity) and the expansion of Internal Revenue Service tax deductions for actors. On the other hand, some playwrights would like to see a relaxation of Equity's Showcase Code restrictions that enable union actors to work non-union productions for free but restrict the length of the production's run.

Clearly, as costs and profit pressures increase, and as technological innovations become a more prominent part of the theatrical experience, some of the theater unions—particularly Actors' Equity—will be forced to make an unpleasant choice: make concessions, or cease to exist in their current form. Meanwhile, if producers continue to rely more and more heavily on cost-cutting technological enhancements, they may have a difficult time justifying the adjective in the League's "Live Broadway" advertising slogan. Without some compromises, live theater could become a threatened commodity instead of one of New York's biggest bragging points. ■

ADVERTISING: A MUST, BUT A COSTLY ONE

Advertising expenses usually constitute about one-fourth of a production's weekly operating costs, and a slightly lower percentage of pre-opening expenses. For a major Broadway show, that one-fourth can equal a million-dollar multimedia campaign. For an off-off-Broadway production, it often buys little more than a few hundred flyers, postcards and stamps.

The link between advertising and attendance is not iron-clad. Broadway musical audiences are more likely to be influenced by word of mouth than by advertisements, while straight-play audiences are more swayed by reviews. But one-third of musical attendees cite advertisements as the decisive factor in their attendance. So do one-fifth of straight-play attendees.[1]

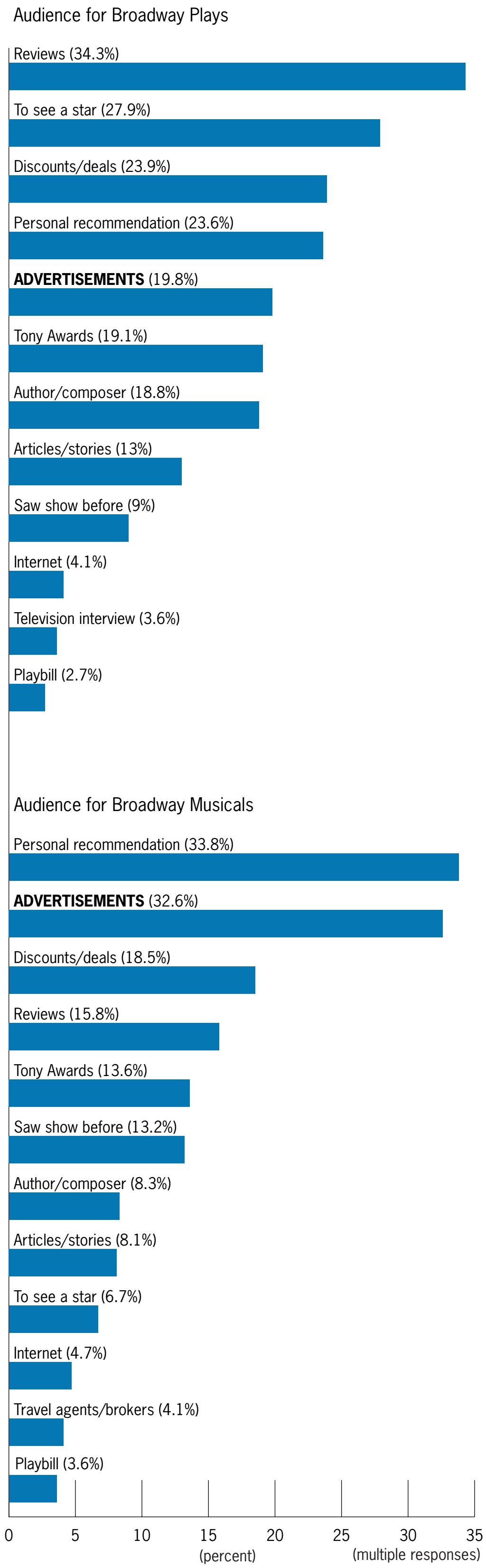
Ever since the landmark television pitch for Bob Fosse's "Pippin" in the mid-1970s, advertising on the small screen has transformed the profile of Broadway. On TV, audiences—especially suburbanites whom the industry had trouble reaching by more traditional means—could get an advance taste of what their ticket money would buy. But the considerable financial costs of TV advertising have helped push Broadway budgets skyward.

These days, television is by far the most influential advertising medium for musicals. (Straight plays, with their lower budgets and visuals that play more poorly on screen, rely far less on it.) Television has been especially useful in luring occasional theatergoers, as distinct from cognoscenti. As a result of that broader geographic and demographic reach, the biggest hits have been able to extend their runs almost indefinitely. "A 17-year run for 'Cats' would have been unthinkable in the 1950s," said Nancy Coyne, head of the theater advertising firm Serino/Coyne.

Broadway's audience within the past generation has increasingly come from beyond the New York metropolitan area. Since Sept. 11, though, the balance has shifted back toward

WHY DO THEY BUY?

FACTORS INFLUENCING THE DECISION TO SEE A SHOW



2000 data. Source: League of American Theatres and Producers

Commercial off-Broadway productions often chase the same audiences as Broadway shows.

local audiences, prompting an increase in locally oriented advertising media such as billboards.

But even before the attack, television was no longer seen as a cure-all. Along with outdoor advertising such as "billboard buses," radio advertising has reasserted its importance. "Theater and radio have much more in common as art forms than theater and television," Coyne explained. "Radio forces you to imagine. You supply the sets and the costumes. When you do that with a good radio spot, you're somewhat hooked."

Advertising's influence wanes as the size of a production declines. Off-Broadway audiences are nearly one-third less influenced by advertising than Broadway audiences.[2] The reasons for this are numerous. A large percentage of off-Broadway audiences are subscribers, whose tickets are bought months in advance. And thematically, off-Broadway shows often resist the easy categorization necessary in a 30-second spot.

While Broadway shows can reap discounts by buying display advertising in bulk, small shows are effectively locked out of television because of the prohibitive costs of production and airtime (though local cable outlets such as NY1 are an option for larger off-Broadway companies). Small theater companies that rely on contributed income may find advertising and promotion a hard sell to funders who would prefer that their money go directly toward "the art." And the success of theater ads depends not only on their reach, but on their frequency. Sustained exposure—what George Wachtel, president of Audience Research & Analysis, calls "maintenance advertising"—can be prohibitively expensive.

These economy-of-scale issues tend to squeeze mid-sized theater companies most. While smaller companies can effectively use grassroots strategies to build audiences, commercial off-Broadway productions often chase the same audiences as Broadway shows. "We have to do advertising—whether it's print, or television to the extent that we can do that—at the same level as, and competing with, the Broadway shows," off-Broadway producer Tony Converse pointed out. "The show that's in a 299-seat house, and that's grossing $50,000 to $70,000 a week, costs just as much to get its message out as a show in a Broadway house grossing $300,000 to $400,000 a week."

Off-Broadway and straight-play Broadway's biggest advertising medium, by far, is print. Not surprisingly, *The New York Times* dominates that segment. Most non-*Times* print spending goes not to other dailies, but to *Time Out New York* or the *Village Voice*. One Broadway straight play we surveyed[3] spent well over half its $400,000 advertising budget on *The Times*. Another surveyed show, produced by an off-Broadway nonprofit, spent more than $22,000 of its $32,000 ad budget on *The Times*, with most of that $22,000 paying for inclusion in the thumbnail Theater Directory ads known as the ABCs.

Although many readers mistakenly assume that the ABCs are free listings, they cost a minimum of $2,000 a week for a daily presence. And off-Broadway productions pay the same per-line rates for them as Broadway shows. (Productions in theaters 199 seats or smaller receive discounts of 4 to 15 percent, but few companies advertising shows of that size can afford the ABCs.) *The Times* does publish editorial listings on Fridays and Sundays, but these are extremely selective and can seem arbitrary; small companies cannot count on them.

The most important advertising-related decision for small to mid-sized companies is whether to buy a presence in the ABCs. Patricia Taylor, managing director of the off-Broadway Women's Project & Productions company, has mixed feelings on the subject, but said she finally decided that her audience does look in *The Times* for information on the company's productions. The off-off-Broadway Artistic New Directions theater company, on the other hand, has generally decided against paying for a listing. The company bought an ABC for its recent one-woman show, "Buon Natale, Bruno," but only because the lead actress paid for it out of her own pocket. "I didn't feel that it was a good idea," said Kristine Niven, the company's artistic producing director. "I don't think it's our audience."

Off-Broadway's marketing difficulties have been exacerbated since the Sept. 11 attack. Companies producing shows last fall had to get the word out not only that their productions were worth seeing, but that their theaters were safe. "When we reopened after Sept. 11, we were at 5 percent [of full capacity]," said Erik Sniedze, associate producer for the Flea Theater seven blocks north of Ground Zero. "We would have decent reservations, and then all of a sudden the front page of the *Post* would call this area a toxic zone."

A big blow to the exposure of small theater companies has been the recent tightening of magazine and newspaper entertainment-listings sections. *New York* magazine, the *Village Voice* and others have reduced the amount of space designated to listings as a result of belt-tightening in the newspaper business, which was well underway before Sept. 11. "We tend to lose column space regularly every week," *Village Voice* listings editor Jose Germosen said, adding that recently the paper's listings have seen a 10 to 15 percent cut. And the situation is likely to get worse.

Small theater companies, especially, look for exposure from theater Web sites such as Nytheatre, Offoffoff and CurtainUp, which run free listings and reviews by readers as well as by critics. "We did have incredible success [online] when we did 'Gum' with Daphne Rubin-Vega," said Taylor of the Women's Project. "So much discussion was happening online because of our play. It was the beginning of seeing how it could be done on a grassroots level."

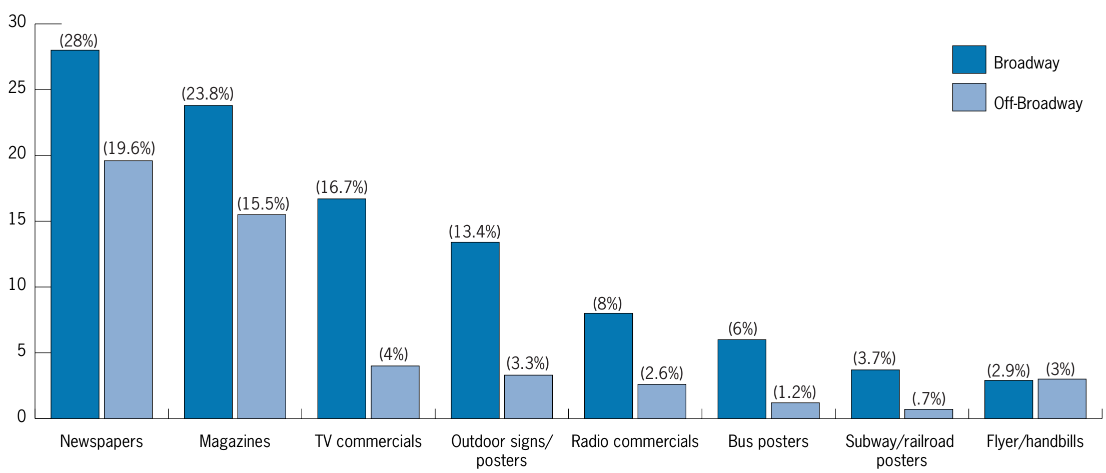
For smaller companies, maintaining a company Web site can be invaluable. Steve Keim of the Perkasie Theatre Company said 30 percent of his audience can be attributed to online traffic. And there are practical benefits. "You can be selling tickets or advertising your show when you don't have staff on," said Beth Emelson, producing director of the Atlantic Theater Company.

But marketers of large productions are less interested in plunging tremendous resources into the Internet. They'd rather direct buyers to a Web site operated by a ticket seller. "Everybody says, 'We need a Web site!'" Coyne of Serino/Coyne said. "I say to them, 'No, you don't. You need Ticketmaster's Web site.' You don't want to educate the audience [online]. You want to sell them tickets."

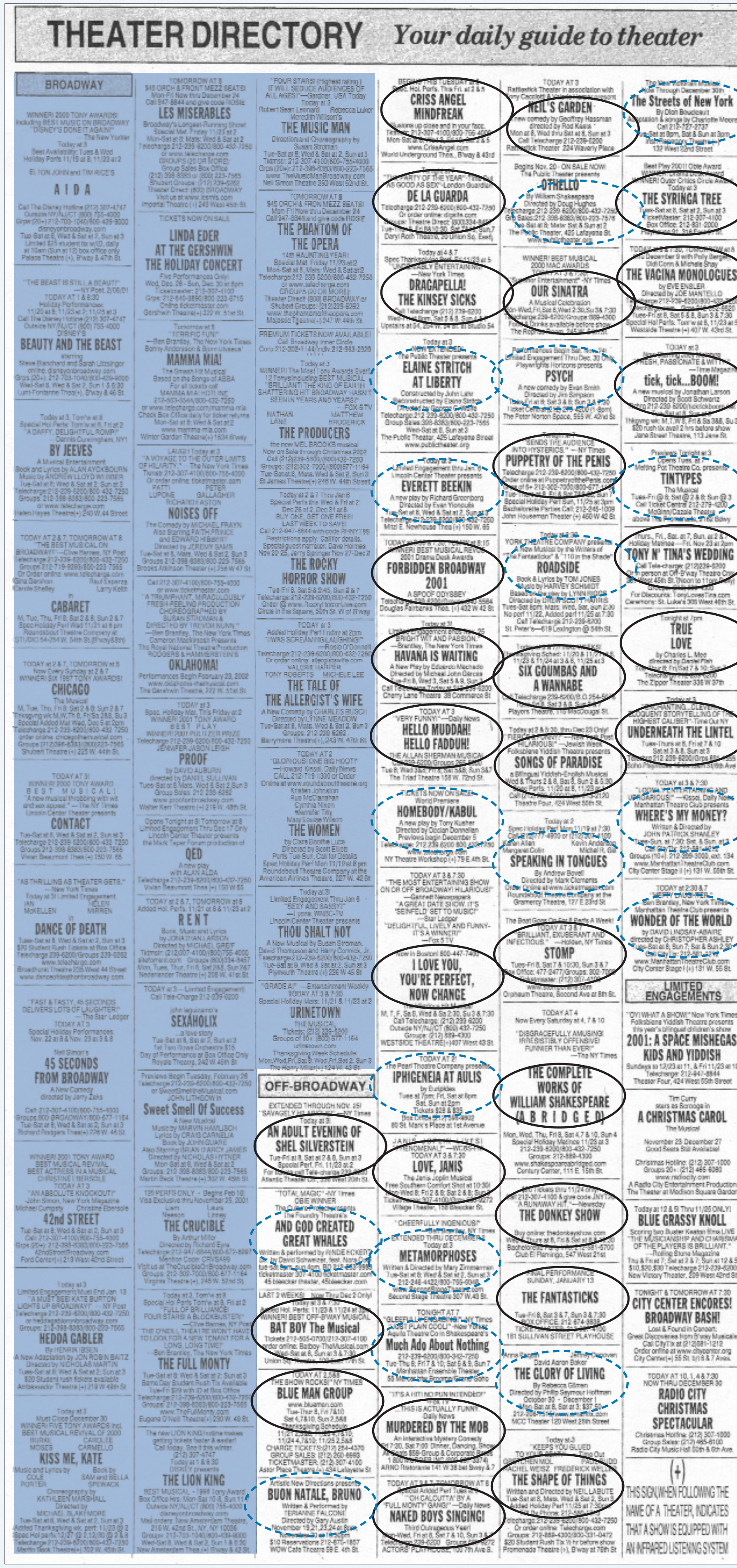
[1] "Who Goes to Broadway 1999-2000," League of American Theatres and Producers, 2001.
[2] "The Audience for New York Theatre," Audience Research & Analysis, commissioned by the Theatre Development Fund and the League of American Theatres and Producers, 1998.
[3] The productions are cited anonymously.

WHAT DRAWS THE CROWDS?

HOW AUDIENCES LEARN ABOUT SHOWS, BROADWAY VS. OFF-BROADWAY



Source: Theatre Development Fund



BROADWAY

COMMERCIAL OFF-BROADWAY

NON-PROFIT OFF-BROADWAY

LEARNING TO READ THE ABCs

The New York Times' "Theater Directory" is a daily institution, the place where a casual theatergoer is most likely to take account of the city's theatrical offerings. The Theater Directory at left, from the Sunday, Nov. 18, 2001 Arts & Leisure section, lists 32 Broadway shows, 46 off-Broadway shows and five Limited Engagements.

But while this Directory may appear to be a comprehensive representation of the theater slate, it's actually an advertisement, a detail that can be inferred but is never explicitly mentioned (its ad status is indicated typographically with a double black line above the copy, as on other *Times* ads). The paid listings cost each production a minimum of $360 on a Sunday and $1,950 for a full week, and do not include one-third of the 65 off-Broadway productions up at that time (according to the Nov. 15 issue of *Time Out New York,* whose listings aim toward comprehensiveness) or any of the 57 off-off-Broadway productions.

COMMERCIAL PRODUCTIONS DOMINATE OFF-BROADWAY

When considering the various niches of the theater industry, it is easy to adopt a "big-guy/little-guy" dichotomy, with the commercial juggernauts of Broadway on one side and the nonprofits of off- and off-off Broadway on the other. This neglects an important niche: that of commercial off-Broadway productions. On the week in question, listings for commercial off-Broadway productions (28) outnumbered nonprofits (15) by a margin of nearly two to one.

Our sample directory suggests that today's off-Broadway is less a haven for "straight plays" that used to be standard Broadway fare than a mottled mix of traditional productions and offbeat crowd-pleasers. These include cabarets ("Our Sinatra"), drag shows ("Dragapella"), illusionists ("Criss Angel Mindfreak"), multi-genre performance forms ("Blue Man Group," "De La Guarda") and humorous bodily manipulation ("Puppetry of the Penis"). ■