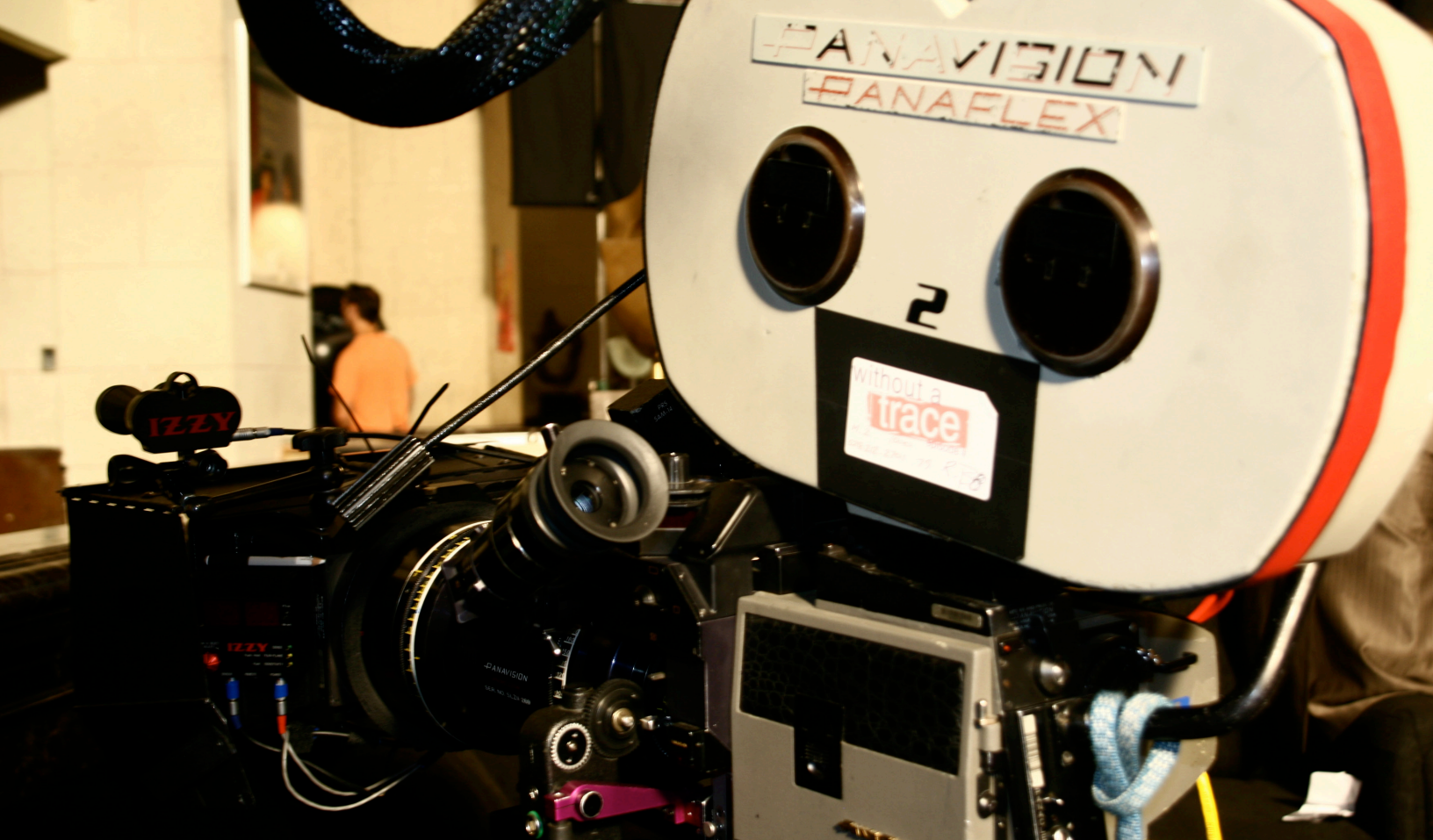




2015

PILOT PRODUCTION REPORT





Each year between January and April, Los Angeles residents observe a marked increase in local on-location filming. New television pilots, produced in anticipation of May screenings for television advertisers, join continuing TV series, feature films and commercial projects in competition for talent, crews, stage space and sought-after locations.

However, Los Angeles isn't the only place in North America hosting pilot production. Other jurisdictions, most notably New York and the Canadian city of Vancouver have established themselves as strong competitors for this lucrative part of Hollywood's business tradition. Below these top competitors is a second-tier of somewhat smaller players in Georgia, Louisiana and Ontario, Canada— home to Toronto.

FilmL.A.'s official count shows that 202 broadcast, cable and digital pilots (111 Dramas, 91 Comedies) were produced during the 2014-15 development cycle, one less than the prior year, which was the most productive on record by a large margin. Out of those 202 pilots, a total of 91 projects (21 Dramas, 70 Comedies) were filmed in the Los Angeles region.

FilmL.A. defines a development cycle as the period leading up to the earliest possible date that new pilots would air, post-pickup. Thus, the 2013-14 development cycle includes production activity that starts in 2013 and continues into 2014 for show starts at any time in 2014 (or later).

While this is the fourth largest annual tally in Los Angeles' history, it was 10 fewer than L.A. handled during its peak year of 2004-05. In terms of overall market share, L.A. captured just 45 percent of all pilots in the current cycle, marking the second year in a row that L.A.'s share fell below 50 percent.



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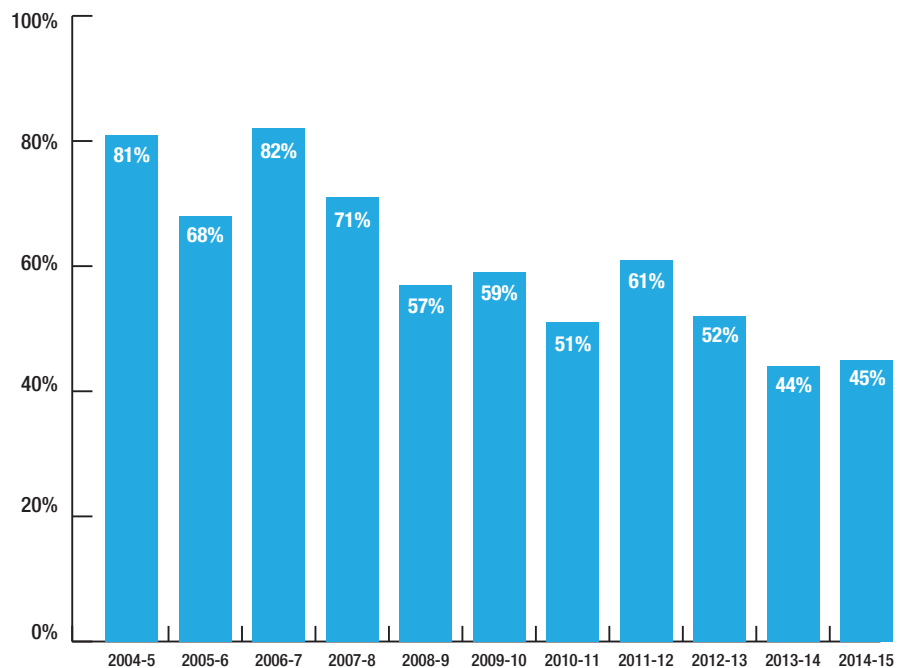
WHAT'S A PILOT?

For more than a decade, FilmL.A. has conducted ongoing primary and secondary research to keep track of new television pilots. Our counts include all pilot projects of which FilmL.A. is made aware through primary and secondary research, and for which a primary production location was verified.

FilmL.A. uses the word “pilot” throughout this study to refer to all original scripted pilots, shorter-length presentations or “hidden pilots” captured during the development cycle. Pilot counts within a development cycle include both stage-based and location-based projects made in any location, of any running duration, intended for primetime debut on either broadcast or cable networks serving U.S. audiences. Original web series are included for this analysis, but animated pilot productions are not counted.

Networks may choose to skip pilot and presentation production and immediately “green light” promising new shows for series production. Rather than discount new production occurring anywhere within the development cycle, FilmL.A. includes the first episode of these “straight-to-series” productions as “hidden pilots” in all of its counts.

L.A.'S SHARE OF TOTAL PILOTS PRODUCED



For FilmL.A. Research, determining what should be counted as a “pilot” seems to grow more difficult with each passing year. For example, one of the pilots tracked this year was for the NBC® series *Heroes: Reborn*, a continuation of the original NBC show *Heroes*, which ran from 2006 to 2010. Should the pilot for the “new” show, from the same studio and showrunners that will air on the same network be counted as a pilot or is the new series just an extension of the prior run on the same network? The same could be said of the reboot the NBC sitcom *Coach* or Fox’s™ forthcoming *X-Files*, which is a limited-run series that is a continuation of the original series that aired on Fox from 1993 to 2002. Given the length of time between the original series and these “new” reboots, FilmL.A. has elected to count them as pilots produced for the new runs.

Another wrinkle in classifying pilots has been the significant increase in the number of limited-run or so-called “event” series that are not intended to last more than a single season. If a single season of episodes is aired for a series that, in fact, doesn’t return for subsequent seasons, it would be akin to a true mini-series like *Roots*, *Lonesome Dove* or Stephen King’s *IT*. A true mini-series is a wholly separate category of production that should fall outside the scope of a pilot study. The problem with these limited or event series is that they sometimes can and do return for multiple seasons with an indefinite rather than limited run. For example, ABC’s® *Agent Carter* was conceived as a “limited” series that would end after eight episodes. However, in early 2015, producers announced that a second season was possible; in May, the show was ordered to a second season of 13 episodes. FilmL.A. included *Agent Carter* in last year’s pilot report and will continue to include the first episodes of “event” or “limited run” projects in our studies while this trend persists.

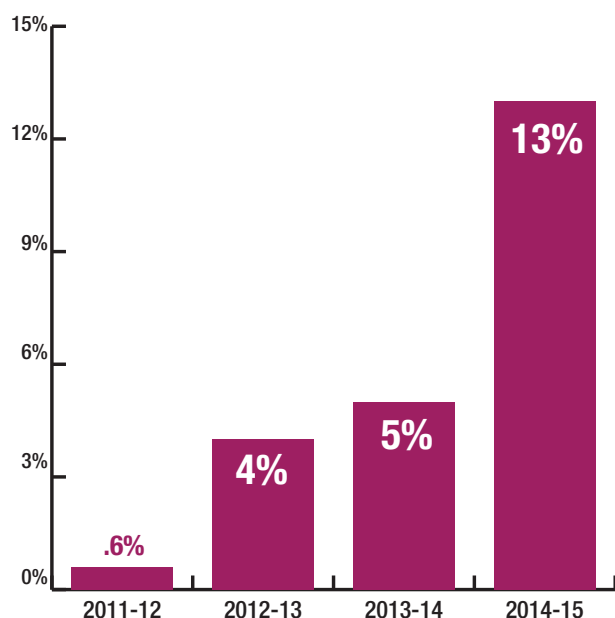
NETWORK, CABLE, AND DIGITAL

Over the last several years, non-traditional programming available from online services like Amazon® and Netflix® began altering the concept of broadcast television in terms of how they acquire content, the manner in which they deliver it and how viewers consume it.

Since the 2007-08 development cycle, FilmL.A. has included in its Television Pilot Production Reports a breakout of broadcast network vs. cable pilot projects. Because digital networks were not major players at that time, FilmL.A. initially counted digital projects as cable series, starting with the 2011-12 development cycle. Today, however, rapid growth in the production of new pilots for digital distribution, demands we count cable projects and digital projects separately.

From this report forward, FilmL.A.'s Pilot Production Reports will include breakouts for broadcast, cable and digital networks.

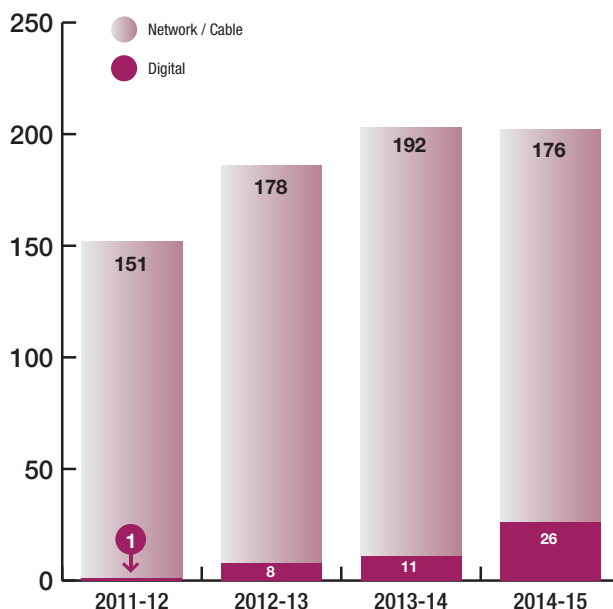
DIGITAL NETWORK SHARE OF PILOT ACTIVITY



GROWTH OF DIGITAL PILOTS

During the 2011-12 cycle, just one pilot tracked by FilmL.A. was produced for a digital network. By comparison, there were 26 pilots produced for digital networks in 2014-15. Leading the digital networks was Amazon, with 13 pilots followed by Netflix (10 pilots), Hulu® (2 pilots) and PlayStation™ Network (1 pilot). Of the 176 non-digital pilots, 85 were cable pilots and 91 were network.

DIGITAL VS. TRADITIONAL PILOT COUNTS



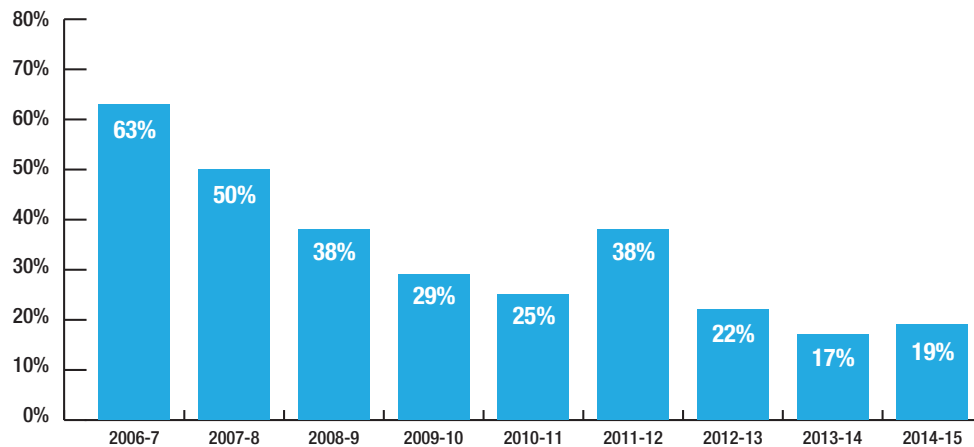
The past year also saw a major development impacting the digital network universe with the announcement that premium cable network channels HBO® and Showtime® would begin offering stand-alone subscription options for people who consume content online and a growing number of consumers electing to “cut the cord” on television providers like Comcast® and Time Warner®. With a network like HBO operating a standalone digital service with original programming options and rates comparable to Netflix or Amazon, it now operates as a digital network player and a traditional cable television network. The distinction between the two mediums is meaningless in this example. As more and more broadcast and cable networks follow what HBO, Showtime, CBS® and others are doing, the distinction between network, cable and digital increasingly will not matter.

DRAMA PILOTS

In 2014-15, the Los Angeles region captured 19 percent of all drama pilots, a modest improvement over its 17 percent share in the prior cycle. Despite this slight improvement, L.A.'s share was still down 70 percent from the peak in 2006-07, when L.A.'s drama share was a commanding 63 percent.

In the 2014-15 cycle, the ratio of drama pilots filmed outside L.A. was 4-to-1. Put another way, for every drama pilot that shot in L.A. four others filmed outside the region. Much like feature films, pilot projects are often produced in jurisdictions where tax incentives are available. The Greater Los Angeles Region's considerable loss of pilot production share is directly tied to incentive-fueled competition.

L.A. SHARE OF TOTAL DRAMA PILOTS PRODUCED



COMEDY PILOTS

L.A.'s share of comedy pilots produced in 2014-15 was 77 percent compared to 76 percent in the previous cycle and substantially lower than the 91 percent share in 2011-12. The raw number of comedy pilots produced in L.A. was 70 in 2014-15 compared to 71 in the previous cycle.

L.A.'s status as the premier pilot production center continues to hinge on industry willingness to produce comedy projects in Los Angeles. Until recently, generous film incentives in other locations have not been successful at siphoning comedy production from L.A. An exception to that rule was New York. However, after four straight years of growth, New York declined for the first time in five years, with 8 comedy pilots in 2014-15 compared to a record high of 11 comedy pilots in the prior cycle.

The remaining 13 comedy pilots that filmed outside of L.A. or New York shot in seven other locations, with Vancouver and Atlanta leading the pack at four comedy pilots apiece.

Multi-camera, stage-bound comedies, which L.A. has been able to retain in great numbers, cost up to \$1.5 million to produce per episode. In 2014-15, there were 35 multi-camera pilots produced (31 in L.A.). By comparison, in 2013-14, there were 40 multi-camera pilots produced (37 in L.A.). Creative reasons, as opposed to economic reasons, presently keep these productions in Los Angeles.

Single-camera comedies that regularly shoot on-location cost slightly more to make, up to \$2.0 million per episode. In 2014-15, there were 56 single-camera pilots produced (39 in L.A.). By comparison, in 2013-14 there were 52 single-camera pilots produced (33 in L.A.).

THE MAINSTREAMING OF “STRAIGHT-TO-SERIES” PRODUCTION

As the initial episode of a proposed series, many pilots are made, but only a few will ever be shown to viewers. Before many pilots can be green-lighted for series, it must first be deemed marketable to television advertisers and foreign distributors.

For decades, broadcast networks have courted advertisers in an expensive and seasonally-driven “upfronts” process. Every year in late May, advertisers preview the shows that will go on to be aired on broadcast networks in the fall or early the following year as mid-season replacements.

Cable and digital networks also screen a variety of scripted content. Unlike network pilots, cable pilots are produced year-round and have increased in number to contribute mightily to development cycle yields. New cable and digital series debut throughout the year.

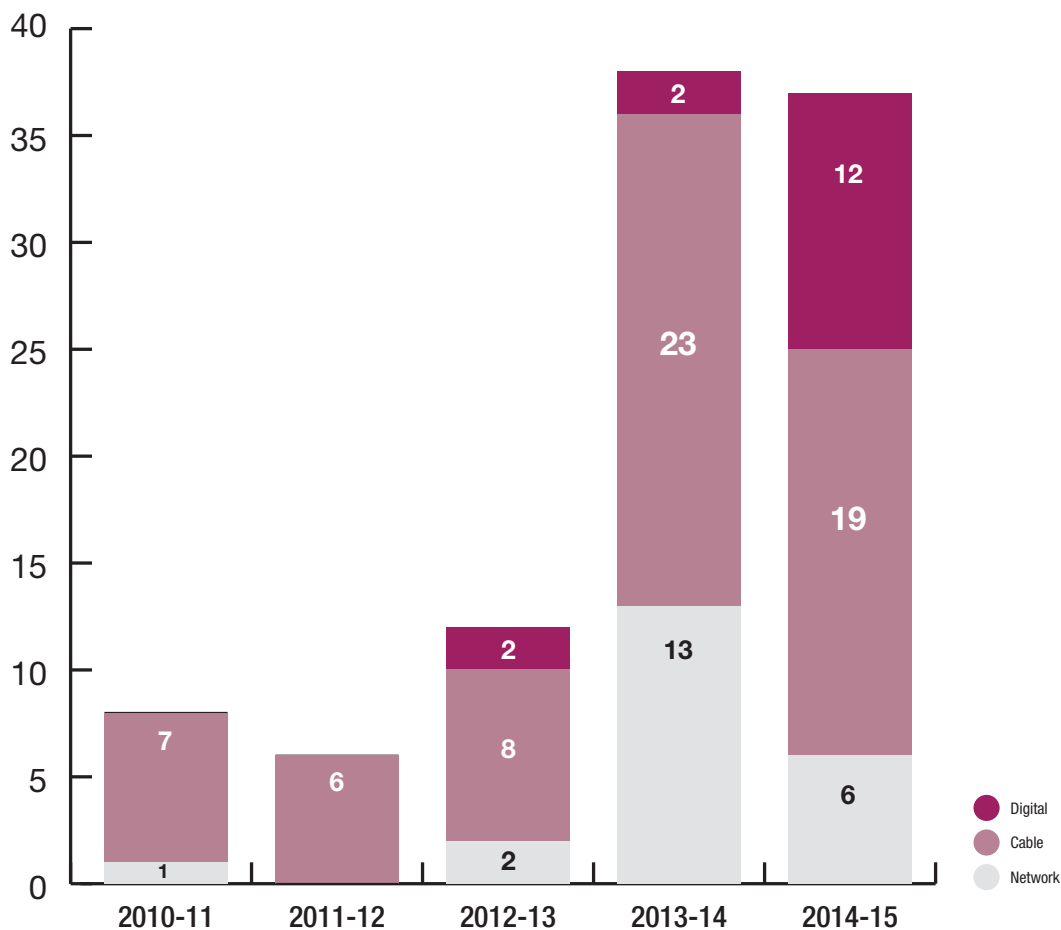
Unlike network and cable networks, the top two digital network players (Amazon and Netflix) are not beholden to advertisers or the “upfronts” process.

Amazon selects which pilots receive full series orders based in large part on the number of times a show is streamed and the percentage of viewers who finish the pilot. Unlike network television, there are no commercial interruptions on Amazon and advertiser influence is effectively taken out of the equation.

Unlike Amazon, the original programming on Netflix has all been straight-to-series orders. Rather than release episodes on a weekly basis like traditional network or cable broadcasts, Netflix makes all episodes available at one time, which also takes advertisers out of the equation.

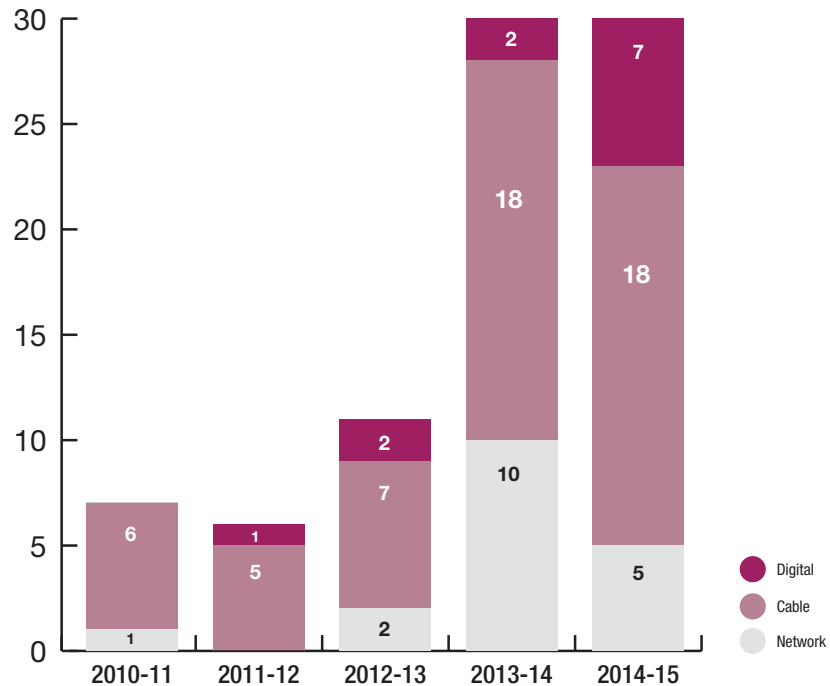
If adapting to a new era of broadcasting (where the lines between television and online digital networks are increasingly blurred) means adopting the practice of ordering more shows straight-to-series, a review of FilmL.A.’s historical data suggests the 2014-15 cycle marks year two of the new era. A total of 37 network and cable shows were ordered straight-to-series in the 2014-15 cycle, which is just one less than the prior cycle. In the last two cycles, there were three times as many shows ordered straight-to-series than in the three prior years combined.

STRAIGHT-TO-SERIES ORDER (DRAMA & COMEDY)



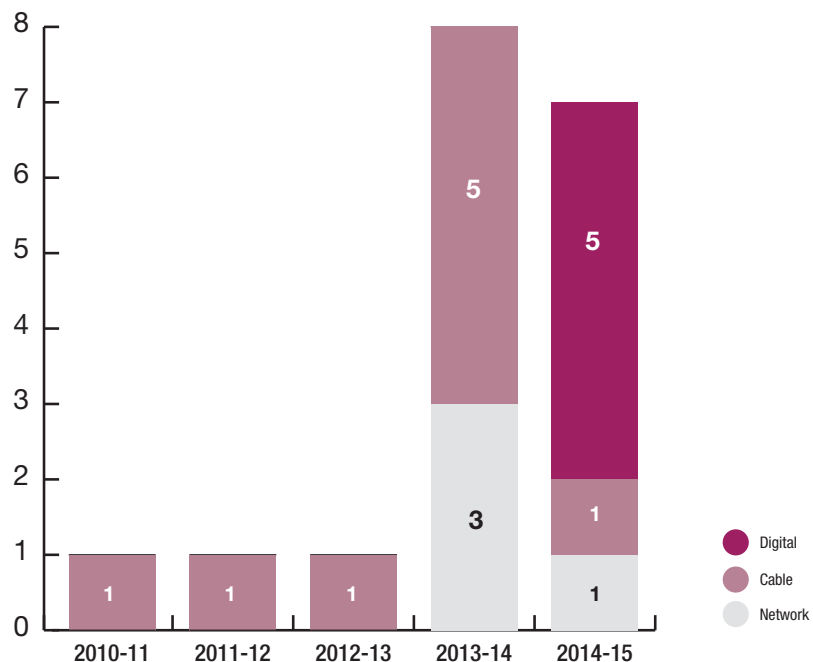
Looking at the trends for drama and comedy series orders reveals other patterns. When it comes to drama projects, cable and digital networks have been more aggressive than the traditional networks in each of the last five cycles. In the last two cycles, the number of dramas ordered straight to series for cable and digital outpaced network orders by a 3-1 margin. The seven digital drama orders in 2014-15 outnumber drama pilots ordered by digital networks in the prior three cycles combined. By comparison, the five network drama orders in 2014-15 represent a 50 percent decrease from the prior year.

DRAMA STRAIGHT-TO-SERIES ORDERS



When it comes to comedy, network and cable networks did not place a priority on ordering shows straight to series during the past cycle. Filling the void in 2014-15 were the digital networks, which ordered five comedies straight to series compared to just one apiece for network and cable.

COMEDY STRAIGHT-TO-SERIES ORDERS





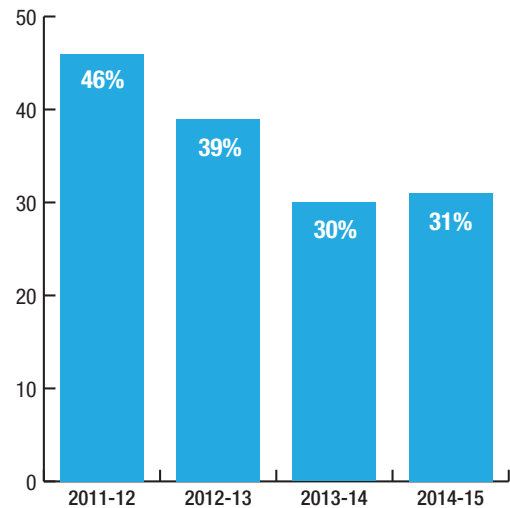
PILOTS' ECONOMIC IMPORTANCE

Pilot production is worthy of study because the activity creates significant economic benefits for the hosting region. The average one-hour drama pilot can directly employ 150-750+ people for the duration of the project.

Typical pilot production costs, having risen over the years, now average about \$2 million (for comedy pilots) and \$6 million to \$9 million (for drama pilots). Presentations, which are sometimes made in lieu of pilots, cost up to 40 percent less to produce than full-length pilots.

Based on these figures, FilmL.A. estimates that approximately \$298 million was spent on television pilot production in Los Angeles during the 2014-15 development cycle, an increase over the \$290 million spent in L.A. during the previous cycle. This is roughly 30 percent of the total amount spent by producers in all locations.

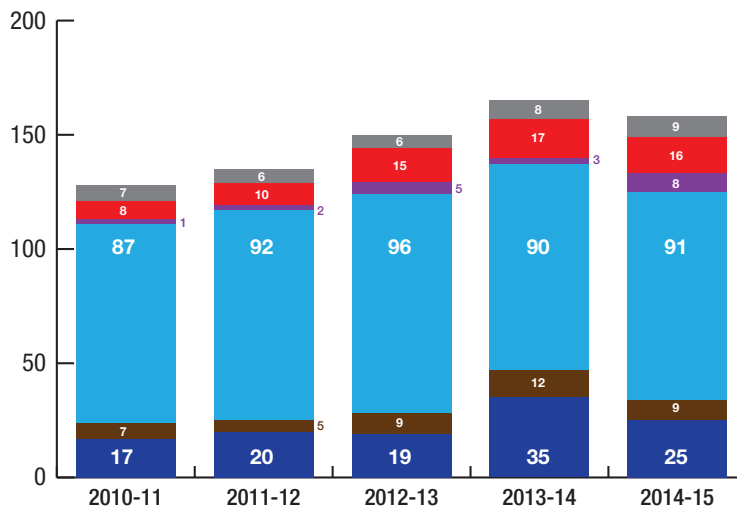
LOS ANGELES SHARE OF PILOT PRODUCTION SPENDING



TOP PILOT PRODUCTION LOCATIONS

During the 2014-15 development cycle, 91 television pilots were filmed on Los Angeles streets and stages. However, 111 other pilots — of which 90 were coveted one-hour drama projects — were produced outside the region in competing jurisdictions. The availability of financial production incentives and production infrastructure are key factors influencing where pilot producers choose to film. As in prior years, some form of film production incentive was available in every one of the non-California locations used during the 2014-15 development cycle.

After L.A., the top competitors for pilot production in 2014-15 were New York (25 pilots), Vancouver (16 pilots), Atlanta (9 pilots), Toronto (9 pilots) and Louisiana (8 pilots). No other location hosted more than five pilots.

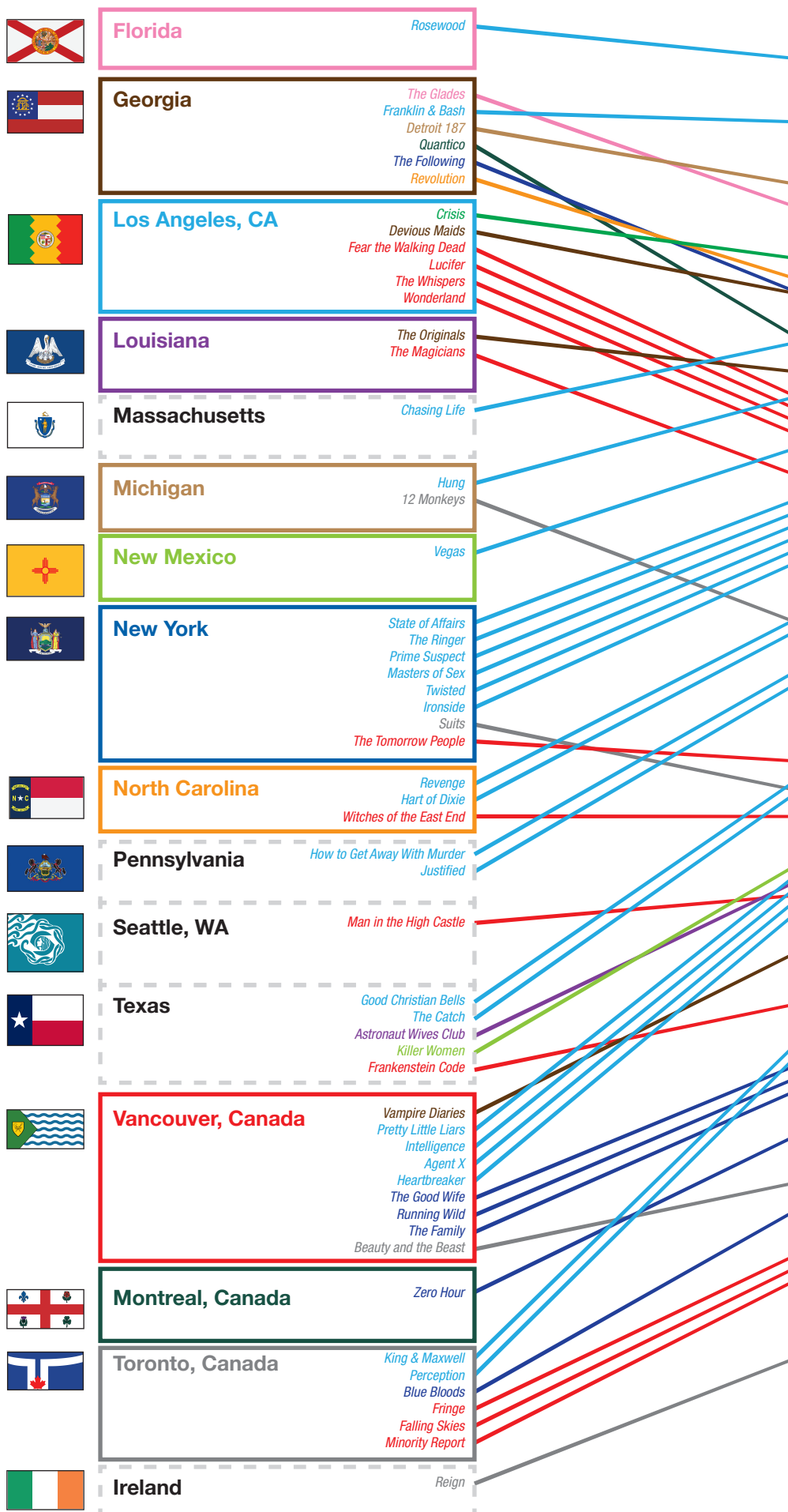


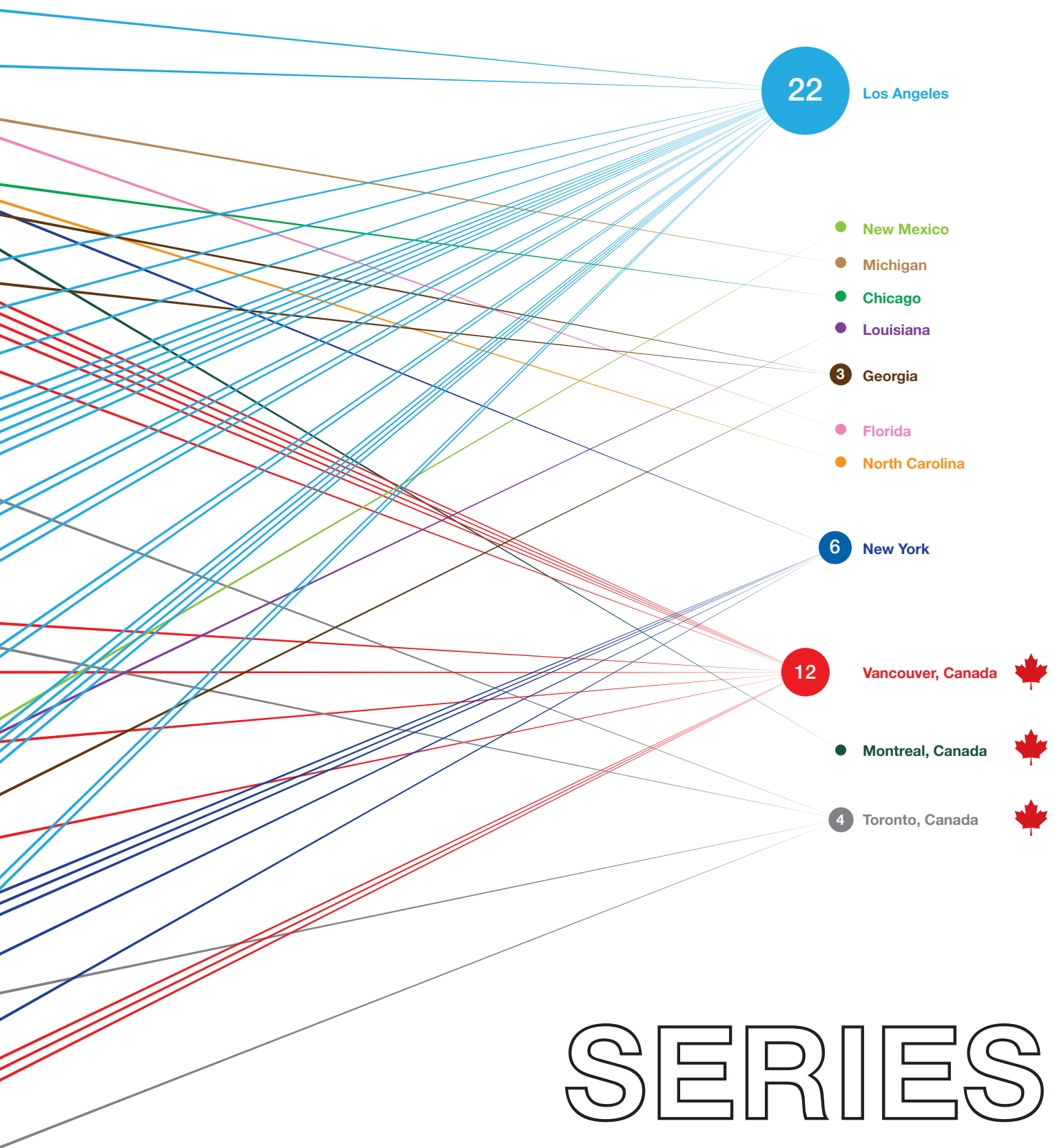
One piece of good news for L.A. in 2014-15 is that, with the exception of Toronto and Louisiana, the other top competitors saw a decline in the number of pilots produced. New York and Georgia, which were both featured in last year's pilot study because of their remarkable growth, saw declines of 29 and 33 percent respectively.

SERIES VS. PILOT PRODUCTION LOCATIONS

The diagram to the right demonstrates the change of locations once a pilot is converted to a series. Only relocated series are depicted.

STOLP





RUNAWAY SERIES PRODUCTION

Pilot producers' ongoing wanderlust introduces a pair of related concerns for those who work in television in L.A. On one hand, lost production share carries with it the threat of diminished pilot season spending. But another, more serious, concern is that the one-time loss of a pilot can easily lead to the loss of a promising series.

In decades past, pilots made in Los Angeles were highly likely to stay in the region if picked up for series production. However, today, both pilot and series production occurs all over the place. In the recent cycle, two pilots that both filmed in L.A. and are set here (*Fear the Walking Dead* and *Lucifer*) are shooting the first season of their respective series in Vancouver. Another show that filmed its pilot in Texas and is set in L.A. (*Frankenstein Code*) is moving to Vancouver as well.

FilmL.A. examined 73 new drama series (many of which are now canceled) that have been produced in L.A. since 2010. Of those dramas, 47 (64 percent) also filmed their pilot episodes in California and 25 (34 percent) relocated after shooting their pilots in other locations. Of the 25 shows that had their pilots and / or initial seasons produced outside California, 12 were induced to relocate by the availability of the California Film & Television Tax Credit (highlighted in yellow).

A final point on relocating series is worth noting. After exhaustive review of past series (regardless of where they filmed their pilots), FilmL.A. Research found 20 examples of shows that relocated after filming one or more seasons in a given location (see page 13).

LOS ANGELES DRAMA SERIES, SINCE 2010

Series	Pilot Location
<i>Franklin & Bash</i>	Georgia
<i>Teen Wolf</i>	Georgia
<i>Hindsight</i>	Georgia
<i>Legends</i>	Los Angeles
<i>American Crime Story</i>	Los Angeles
<i>American Horror Story</i>	Los Angeles
<i>Aquarius (January 2015)</i>	Los Angeles
<i>Battle Creek</i>	Los Angeles
<i>Bosch</i>	Los Angeles
<i>Bunheads</i>	Los Angeles
<i>Code Black</i>	Los Angeles
<i>Colony</i>	Los Angeles
<i>Crazy ExGirlfriend</i>	Los Angeles
<i>Criminal Minds Beyond Borders</i>	Los Angeles
<i>CSI: Cyber</i>	Los Angeles
<i>Extant</i>	Los Angeles
<i>Full Circle</i>	Los Angeles
<i>Gang Related (Mid-Season)</i>	Los Angeles
<i>Harry's Law</i>	Los Angeles
<i>Hit The Floor</i>	Los Angeles
<i>Hollywood Heights</i>	Los Angeles
<i>Jane by Design</i>	Los Angeles
<i>Jane the Virgin</i>	Los Angeles
<i>Major Crimes</i>	Los Angeles
<i>Marvel's Agent Carter (Mid-Season)</i>	Los Angeles
<i>Matador (2015)</i>	Los Angeles
<i>Mistresses (Mid-Season)</i>	Los Angeles
<i>Murder in the First</i>	Los Angeles
<i>Navy Street</i>	Los Angeles
<i>News Room</i>	Los Angeles
<i>Nine Lives</i>	Los Angeles
<i>Ray Donovan</i>	Los Angeles
<i>Recovery Road</i>	Los Angeles
<i>Rizzoli & Isles</i>	Los Angeles
<i>Rush Hour</i>	Los Angeles
<i>Scandal (Mid-Season)</i>	Los Angeles

Series	Pilot Location
<i>Scorpion</i>	Los Angeles
<i>SHIELD</i>	Los Angeles
<i>Snowfall</i>	Los Angeles
<i>Stalker</i>	Los Angeles
<i>Stitchers</i>	Los Angeles
<i>Supergirl</i>	Los Angeles
<i>Switched at Birth</i>	Los Angeles
<i>The Brink</i>	Los Angeles
<i>The Wedding Band</i>	Los Angeles
<i>Touch (Mid-Season)</i>	Los Angeles
<i>Utopia</i>	Los Angeles
<i>The Fosters</i>	Los Angeles
<i>Westworld</i>	Los Angeles
<i>Wicked City</i>	Los Angeles
<i>Chasing Life</i>	Massachusetts
<i>Rosewood</i>	Miami
<i>Hart of Dixie</i>	North Carolina
<i>Revenge</i>	North Carolina
<i>Secrets and Lies (relocating to LA)</i>	North Carolina
<i>Masters of Sex</i>	NY
<i>Ironside</i>	NY
<i>State of Affairs</i>	NY
<i>Twisted</i>	NY
<i>How To Get Away With Murder</i>	Pennsylvania
<i>Body of Proof</i>	Rhode Island
<i>The Last Ship</i>	San Diego
<i>The Catch</i>	Texas
<i>The Bridge</i>	Texas
<i>The Lying Game</i>	Texas
<i>Perception</i>	Toronto
<i>Agent X</i>	Vancouver
<i>Heartbreakers</i>	Vancouver
<i>Pretty Little Liars</i>	Vancouver
<i>Intelligence</i>	Vancouver
<i>King & Maxwell</i>	Toronto
<i>Justified</i>	Pennsylvania

Out of 20 studied shows that date back to the 1980s, six shows relocated after just one season and six shows relocated after two. Put another way, for shows that have relocated after shooting a season or more in one place, 67 percent had only filmed one or two seasons before relocating. Four series relocated after three or four seasons in a given location and just two series relocated after shooting five or more seasons in one place.

From a historical perspective, it seems clear that shows are much less likely to relocate after shooting more than one season in any given location.

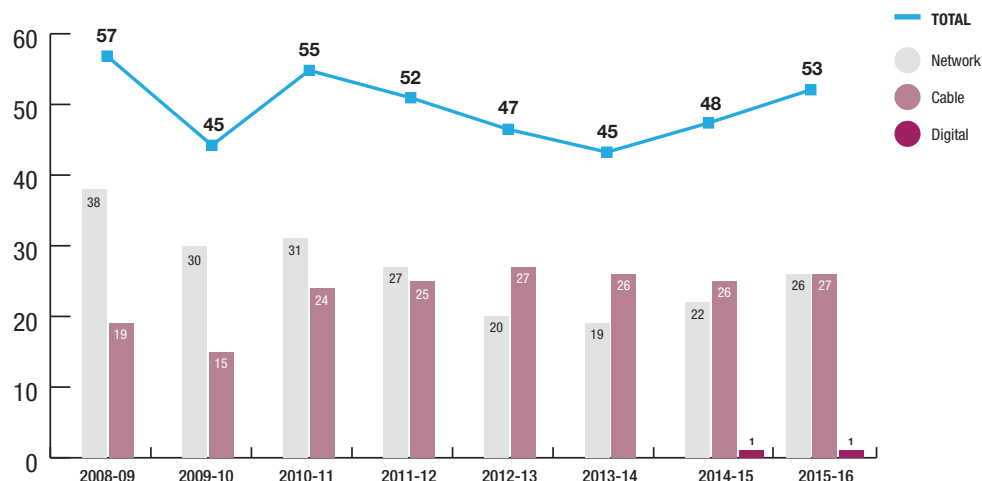
NOTABLE TV SERIES RELOCATIONS, SINCE 1987

Series	Original Location	Relocation Destination(s)	Reason for Move
<i>Baywatch</i>	Los Angeles, seven seasons (1988-1998)	Hawaii, two seasons (1999-2001)	Incentives
<i>X-Files</i>	Vancouver, five seasons (1993-1997) (Pilot shot in LA)	Los Angeles, four seasons (1998-2001)	Family reasons for cast
<i>Veep</i>	Baltimore, four seasons (2012-2015)	Los Angeles, ongoing (2015)	Incentives
<i>Spin City</i>	New York, four seasons (1997-2000)	Los Angeles, two seasons (2000-2002)	Cast
<i>Banshee</i>	North Carolina, three seasons (2012-2015)	Pennsylvania, ongoing (2015)	Incentives in Pennsylvania after North Carolina incentive program curtailed
<i>Homeland</i>	North Carolina, three seasons (2011-2013)	South Africa, one season (2014); Germany, one season (2015)	Creative/setting
<i>American Horror Story</i>	Los Angeles, two seasons (2011-2013)	New Orleans, two seasons (2013-2014); Los Angeles (2015)	Incentives
<i>Teen Wolf</i>	Georgia, two seasons (2011-2012)	Los Angeles, ongoing (2013-current)	Incentives
<i>Sleepy Hollow</i>	North Carolina, two seasons (2012-2014)	Georgia, ongoing (2015)	Incentives in Georgia after North Carolina incentive program curtailed
<i>Mistresses</i>	Los Angeles, two seasons (2012-2014)	Vancouver, ongoing (2015)	Incentives
<i>Ugly Betty</i>	Los Angeles, two seasons (2006-2008) (Pilot shot in NY)	New York, two seasons (2008-2010)	Creative/incentives
<i>MacGyver</i>	Los Angeles, two seasons (1985-1987)	Vancouver, four seasons (1987-1991); Los Angeles, one season (1991)	Currency savings/creative
<i>Revolution</i>	North Carolina, one season (2012/13) (Pilot shot in Atlanta)	Texas, one season (2013/14)	Creative/incentives
<i>The Leftovers</i>	New York, one season (2013/14)	Texas, ongoing (2015)	Creative
<i>Body of Proof</i>	Rhode Island, one season (2011)	Los Angeles, two seasons (2011-2013)	Incentives
<i>Secrets and Lies</i>	North Carolina, one season (2014)	Los Angeles, ongoing (2015)	Incentives
<i>Hindsight</i>	Georgia, one season (2014)	Los Angeles, ongoing (2015)	Incentives
<i>Falling Skies</i>	Toronto, one season (2010)	Vancouver four seasons (2011-2015)	Creative/incentives
<i>Fringe</i>	New York, one season (2008)	Vancouver, four seasons (2008-2012)	Incentives
<i>Monk</i>	Toronto, one season (2004) (Pilot shot in Vancouver)	Los Angeles, seven seasons (2005-2010)	Creative

THE CURRENT DRAMA SERIES LANDSCAPE IN LOS ANGELES

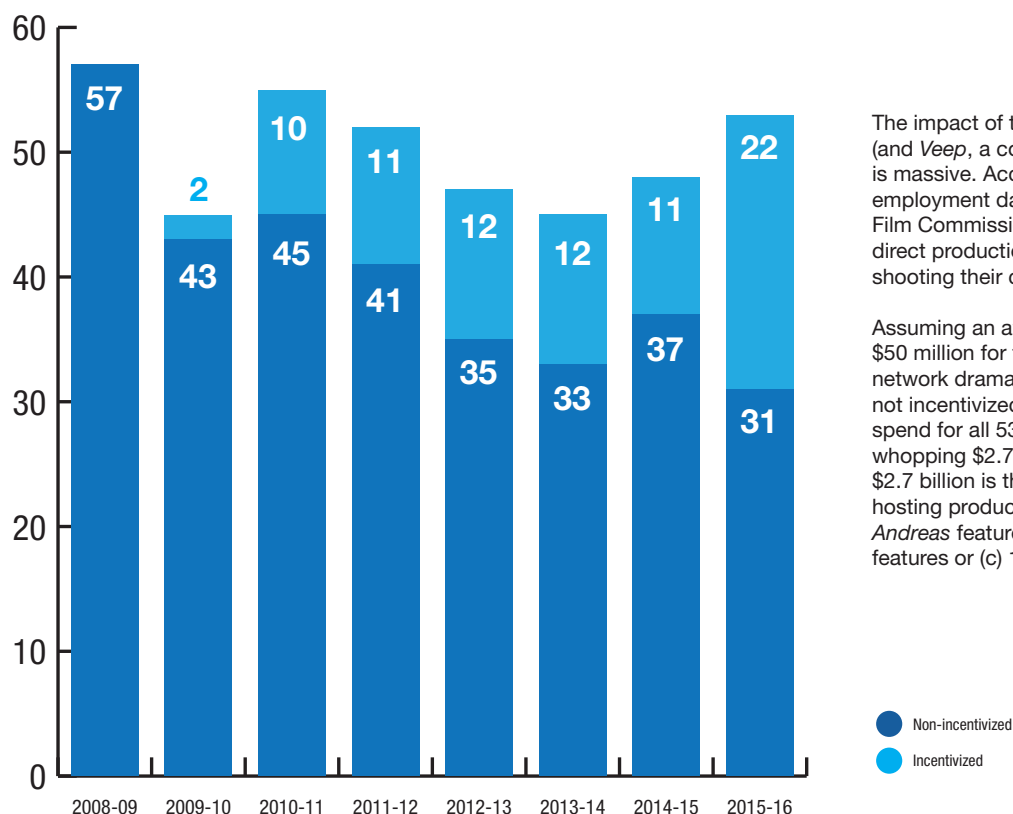
The good news for California is that the number of one-hour scripted drama series shooting in the state stands at 53, the best showing in five years. Local network drama production is increasing, while cable drama production is holding steady.

CALIFORNIA DRAMAS: NETWORK VS. CABLE



California can credit the reversal of fortune in large part to the California Film & Television Tax Credit Program, including the expansion of the program that passed last year. Under the new version of the program, dubbed 2.0, eligibility has been expanded to drama series regardless of where it is broadcast and now includes network, premium cable and digital channels. Under the old program, only new basic cable and relocating series were eligible for the incentive. Expanded with the new program, California will be hosting five network dramas, two premium cable dramas and 15 new or returning basic cable dramas.

CALIFORNIA BASED DRAMAS



The impact of these incentivized dramas (and *Veep*, a comedy on premium cable) is massive. According to spending and employment data provided by the California Film Commission, these 22 series will have a direct production spend of \$1.15 billion while shooting their current/upcoming season.

Assuming an average season budget of \$50 million for the remaining 31 cable and network dramas based in California that are not incentivized, the total annual production spend for all 53 dramas in the state is a whopping \$2.7 billion. To put that in context, \$2.7 billion is the equivalent of California hosting production each year of (a) 25 *San Andreas* features; (b) 18 *Jurassic World* features or (c) 14 *Furious 7* features.

STATE INCENTIVIZED CALIFORNIA BASED DRAMAS

Project	Total CA Spend	Cast *	Crew	Background	Type
<i>Agent X</i>	\$61,000,000	80	300	4380	Basic Cable
<i>American Crime Story</i>	\$66,000,000	8	165	6091	Basic Cable
<i>American Horror Story</i>	\$58,000,000	360	125	2670	Basic Cable
<i>Code Black</i>	\$41,000,000	200	185	6060	Network
<i>Crazy Ex-Girlfriend</i>	\$36,000,000	437	144	1452	Network
<i>Heartbreaker</i>	\$44,000,000	15	250	4200	Network
<i>Hindsight</i>	\$21,000,000	23	115	2115	Basic Cable
<i>Hit the Floor</i>	\$36,000,000	28	115	6100	Basic Cable
<i>Major Crimes</i>	\$68,000,000	21	171	2860	Basic Cable
<i>Murder in the First</i>	\$44,000,000	72	240	3930	Basic Cable
<i>Pretty Little Liars</i>	\$54,000,000	215	150	5340	Basic Cable
<i>Recovery Road</i>	\$50,000,000	170	185	8364	Basic Cable
<i>Rizzoli & Isles</i>	\$67,000,000	270	150	4194	Basic Cable
<i>Rosewood</i>	\$40,000,000	331	125	2760	Network
<i>Secrets and Lies</i>	\$35,000,000	128	185	1840	Network
<i>Snowfall (Pilot)</i>	\$9,000,000	88	122	811	N/A
<i>Stitchers</i>	\$51,000,000	190	185	7251	Basic Cable
<i>Switched at Birth</i>	\$56,000,000	156	192	8325	Basic Cable
<i>Teen Wolf</i>	\$60,000,000	20	130	5160	Basic Cable
<i>Utopia</i>	\$117,000,000	575	169	15600	Premium Cable
<i>Veep</i>	\$49,000,000	235	195	3050	Premium Cable
<i>Westworld</i>	\$88,000,000	64	185	4896	Premium Cable
TOTAL	\$1,151,000,000	3,686	3,783	107,449	

* Over the course of a series, total talent jobs can include regular cast, recurring cast and guest roles.

Source: California Film Commission (CFC)

CONCLUSION

As our decade of independent research reveals, the pilot production landscape in Greater Los Angeles has greatly changed over an unexpectedly short time. The ever-present availability of film incentives, first outside and then later in California, has made fierce jurisdictions' ongoing competition for new television projects and jobs.

Also thanks to these incentives, television production budgets were observed to increase and help fuel a rise in on-screen production value, particularly for new drama pilots and drama series.

And at the same time, viewer demand for original content lured both cable and digital networks into the content creation business. The number of annual pilot projects in production doubled within a decade, driving state and local policy change to capture this increase in business.

And as for the genre we originally set out to track – “television pilots” – what are we to do with that term? As consumers enjoy content across a range of devices and screens, the industry has begun to question its assumptions about how episodic content is best vetted, sold and screened. We might not call always call the things we track “pilots,” or for that matter, call this part of the business “television”. But we at FilmL.A. Research remain committed to this work, and studying episodic content in all its forms.



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