2019
Television Report

Film
LA


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PHOTO: Hilary Bronwyn Gayle / HBO / *Big Little Lies*

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INTRODUCTION

We are living in the era of "peak TV," where all our screens are potential television sets, and there are more shows to watch on them than ever — whenever and wherever! Over the last several years, non-traditional programming from cable channels and digital platforms (the "streamers") has begun to alter the film industry landscape. Not only are more shows being made, but also changing is how content is acquired and delivered to consumers.

Television series production has a significant impact on a region's film economy. This is because a single television series can employ hundreds of people over a duration of many seasons. For example, a one-hour series can employ 200 or more crew members per season, plus thousands of background performers and extras, plus cast. The production will support a network of related suppliers and infrastructure. Further, once a television series settles into a production location, it typically remains in that same location for the duration of its creative run, unless its creators can be persuaded by aggressive financial incentives or other enticements to shoot elsewhere.

In this study, FilmLA explores notable topics and trends impacting the television industry and how they influence production levels in California and competing jurisdictions. Some of the topics considered in this study include recent growth in the number of new projects in production, and patterns in production location selection by distribution platform. We also discuss the current number of live-action scripted series on air and their respective production locations, including the growing influence of digital streaming services, and establishment of production hubs and stage infrastructure outside of California.

This year marks the first time that digital platforms produced more new shows than broadcast and cable networks, with additional growth expected through 2020. In 2019, combined content spending from these new players is expected to reach into the tens of billions of dollars.

What emerges is a portrait of a competitive industry growing at breakneck speed, with its fastest growing sector spreading production around and away from established production centers, like Greater Los Angeles. California, comfortably poised as the epicenter of U.S. domestic television production, will continue to be challenged by other jurisdictions seeking to capture a bigger piece of the TV business for themselves.

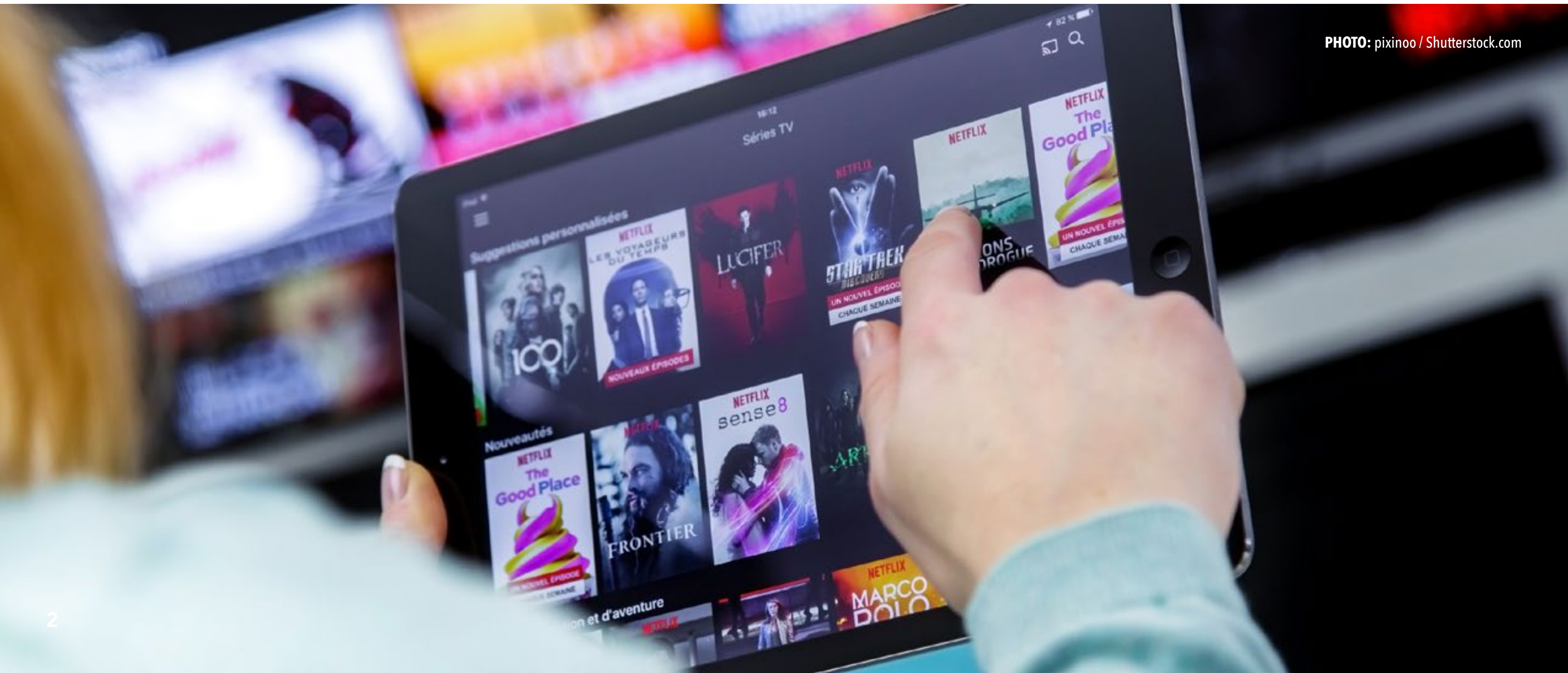


PHOTO: pixinoo / Shutterstock.com

NEW SCRIPTED TELEVISION PROJECTS

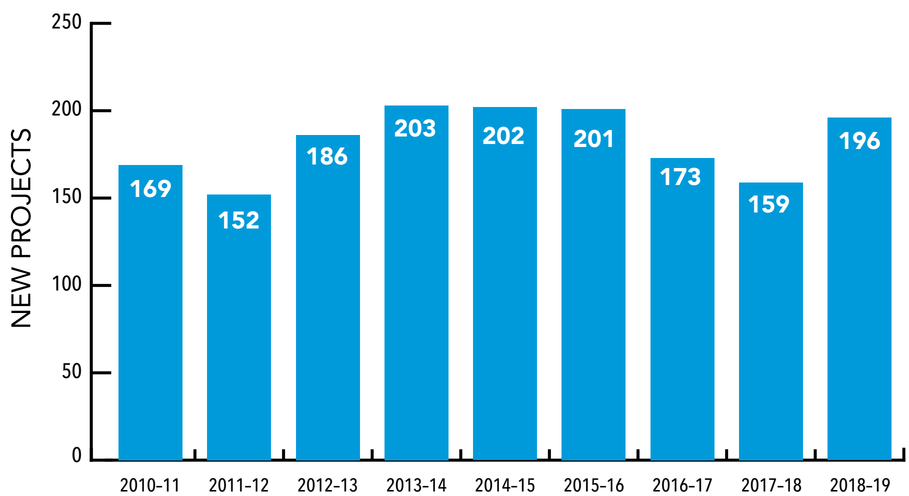
FilmLA tracks new, live-action scripted projects by location over time to determine which jurisdictions are capturing this production and to note any discernible shifts and trends. This first portion of our analysis focuses solely on new, live-action scripted shows/series dramas and comedies ("new projects"). The production cycle for these new shows runs between June 1, 2018 through May 31, 2019 ("2018–19").

These new projects include both pilots and series that have been completed during this cycle. Excluded from this count are reality TV shows, news and talk show programming, documentaries, TV specials, TV movies, animation, children's educational programming, short form video and daytime TV dramas.

During this cycle, FilmLA counted a total of 196 new projects — both scripted dramas and comedies — on all three television distribution platforms — broadcast, cable and digital. Our count includes 67 broadcast, 53 cable, and 76 streaming shows.

Year over year, the total number of new projects (196 count) increased by approximately 23.3 percent from 159 in the previous cycle (2017–18).

NEW PROJECT COUNT BY PRODUCTION CYCLE



FilmLA counted a total of 67 new projects on broadcast networks that were made during this cycle — 37 were one-hour and 30 were half-hour. The broadcast networks produced fewer projects this year (76 last year vs. 67 this year) and had their lowest cancellation rate in 10 years. In fact, the past three television seasons have had three of the four lowest cancellation rates of the past ten years. In 2018–19, the cancellation rate for broadcast network shows was approximately 30 percent, compared to approximately 54 percent in the previous year, and over 60 percent in years 2009–10 and 2015–16.[1]

Drivers for this trend in lower cancellation rates are complex. Explanations for the more recent approach could include, but are not limited to, the desire to retain top talent. Recent defections of top network producers like Shonda Rhimes and Ryan Murphy to Netflix with reported nine-figure deals underscore this phenomenon.

This year, cable networks produced a total of 53 new projects (compared to 42 in 2017–18). This consisted of 43 one-hour and 10 half-hour projects.

1 Rick Porter, "TV Long View: No Hits, No Problem – Cancel Rate for Rookie Shows Could Hit 10-Year Low," *Hollywood Reporter*, May 18, 2019: https://www.hollywoodreporter.com/live-feed/cancel-rate-rookie-shows-hits-10-year-low-2018-19-1211843

Of particular note in this cycle, the number of new projects for digital platforms surpassed those on broadcast (67 count) and cable (53) television for the first time. A total of 76 new projects were made by digital platforms, up from 41 in the previous cycle. This means that the number of new digital projects nearly doubled in one year, increasing by approximately 85.3 percent.

Among those 76 new projects made during this cycle, 59 were one-hour in duration and the remaining 17 were half-hour. As will be discussed, the introduction of new streaming platforms in the fourth quarter 2019 (Disney+© and, Apple TV+©) and in early 2020 (HBO Max℠, NBCUniversal / Peacock™, Quibi©) make it nearly certain that the number of original series/new projects will increase in the near future, as new players seek to fill their schedules and compete for viewers.

NEW SCRIPTED TELEVISION PROJECTS: 2018–19

PLATFORM	1 HOUR	½ HOUR	TOTAL
Broadcast	37	30	67
Cable	43	10	53
Digital	59	17	76
TOTAL	139	57	196

NEW PROJECTS ORDERED STRAIGHT-TO-SERIES

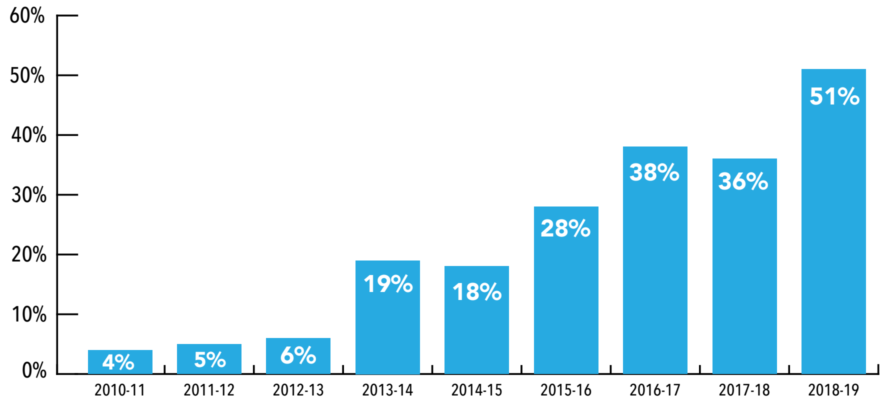
Prior to the popularization of straight-to-series orders for cable and streaming platforms, most new television series started life as traditional "pilots." A pilot is a stand-alone episode of a series that is used to sell the series to network advertisers. Concern about high up-front costs has been the primary reason networks are reluctant to order straight-to-series. Therefore, the pilot system's longevity is tied to ad-supported network television.

With the emergence of the future streaming platforms, however, the straight-to-series model is poised to become more common than in the past. Digital platforms are less dependent upon commercials and advertising revenue. Instead, they rely more on subscriber fees, which gives them more flexibility when debuting shows.

A total of 100 new shows were ordered straight-to-series, including 4 broadcast, 26 cable and 70 digital projects. This contrasts with 58 projects last year, representing an impressive increase of 72.4 percent in one year.

Looking at the mix between new projects and straight-to-series orders, 51 percent of new projects ordered went straight-to-series, compared to 36 percent for the last cycle (2017–18), and a mere four percent in 2010–11. This increase can be attributed to the fact that 70 of the digital network's 76 new projects — approximately 92.1 percent of the total — were ordered straight-to-series. As digital platforms proliferate, we expect this proportion to increase.

SHARE OF NEW PROJECTS ORDERED STRAIGHT-TO-SERIES



PRODUCTION LOCATIONS BY DISTRIBUTION PLATFORM

For this section, FilmLA analyzed production location data for new projects, which refers to new, scripted television shows, across three distribution platforms: **broadcast**, **cable** and **digital**.[2]

2 **NOTE:** A breakdown of data on the three platforms will be tracked moving forward in order to ascertain the number of new shows these platforms are generating annually and where they are being shot. This is to provide year-over-year comparisons, as well as changes over time.

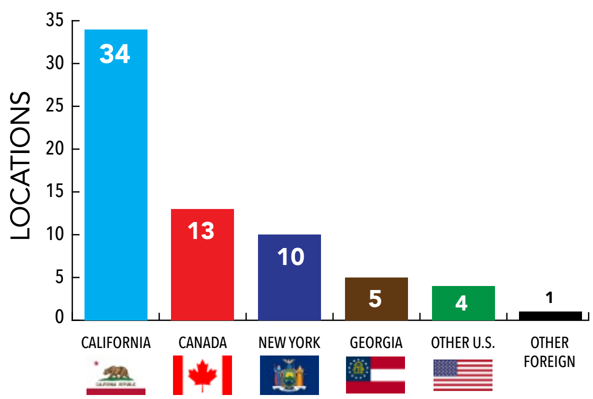
BROADCAST NETWORK TELEVISION LOCATIONS

Among the 67 new broadcast projects (37 one-hour and 30 half-hour) produced this year, 34 chose California as the primary production location. This comprises approximately 50.7 percent of all locations used for the production of new projects on this platform.

California was followed in a distant second and third place by Canada (13 projects) and New York (10). Georgia (5), other U.S. states (4) and one foreign location rounded out the locations of the remaining nine projects. Among Canadian locations, Vancouver, British Columbia, welcomed 11 new projects and Toronto, Ontario, hosted two.

The four other U.S. states that captured new broadcast projects this year include New Mexico (Albuquerque), Louisiana (New Orleans), Tennessee (Memphis) and New Jersey (Middletown and Keyport).

LOCATIONS FOR NEW NETWORK SHOWS: 2018-19



Looking strictly at new, one-hour broadcast projects, California falls to third place, tied with Georgia at five new shows each. Both Canada and New York surpassed California and Georgia in the production of new one-hour projects this year. A total of 13 one-hour projects were produced in Canada during this cycle, followed by nine in New York and five in California. Like California, both jurisdictions offer a combination of attractive incentives, crew depth, stage infrastructure and support services. The addition of a new, one-hour project translates into a local spend of approximately $47 million per project/season, excluding the costs of above-the line talent.[3]

For the production of new, half-hour broadcast projects, California commands an astounding 97 percent market share with 29 projects out of 30 made in the state. Based on approved film tax credit reports from the California Film Commission[4] and Empire State Development[5], a half-hour drama averages approximately $25 million per project/season in local spend, exclusive of above-the-line talent costs.

3 California Film Commission: "Film and Television Tax Credit Program 2.0". http://film.ca.gov/wp-content/uploads/2.0-CFC-Approved-Projects-List-07.29.19.pdf

4 California Film Commission: "Film and Television Tax Credit Program 2.0". http://film.ca.gov/wp-content/uploads/2.0-CFC-Approved-Projects-List-07.29.19.pdf

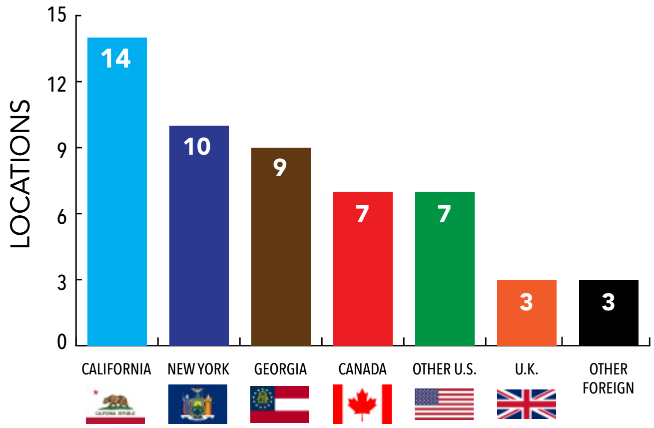
5 Empire State Development: "Film Tax Credit 2018 Quarterly Reports". https://esd.ny.gov/esd-media-center/reports/film-tax-credit-2018-quarterly-reports

CABLE TELEVISION LOCATIONS

In this development cycle, a total of 53 new projects were produced for cable television. This includes 43 one-hour and 10 half-hour projects.

Locations for new cable projects this year are decidedly more mixed than those of the broadcast networks. This year California captured the most projects (claiming 14), followed closely by New York (10), Georgia (9), Canada (7), other U.S. locations (7), the UK (3) and other foreign locations. This means that California had a lower 26.4 percent market share as a production location for new cable projects, compared to 50.7 percent of all new projects on broadcast platforms this year.

LOCATIONS FOR NEW CABLE SHOWS: 2018-19



Other U.S. locations include New Mexico (2 projects), Florida, Louisiana, Rhode Island, North Carolina, and Alabama. Foreign locations include Budapest, South Africa and Ireland.

In the increasingly competitive television field, cable networks are investing more in programming. As an example, HBO's recently announced fall slate includes 50 percent growth in programming hours.[6] Showtime© plans a 30 percent increase in programming, which includes both scripted and unscripted programming.[7] How this translates into new scripted projects next year remains to be seen.

6 Mary McNamara, "HBO is still in the game, exec insists," *Los Angeles Times*, August 12, 2019. P. E4.

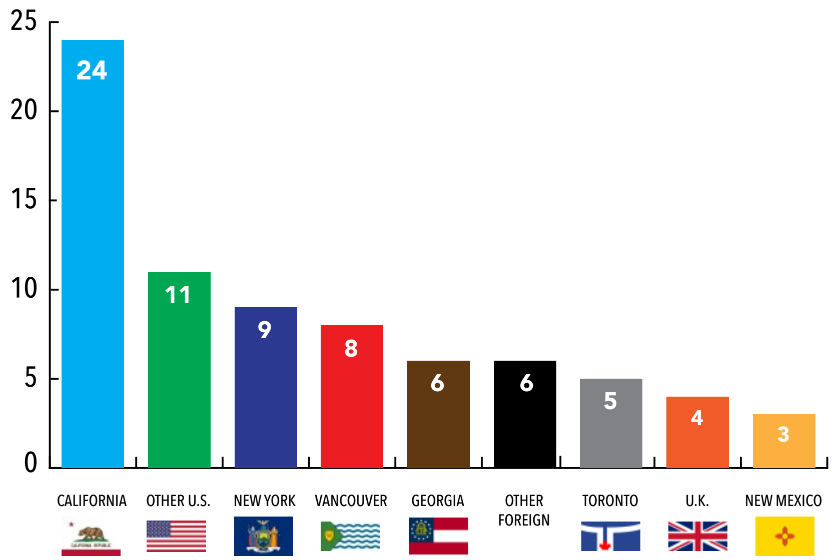
7 Gary Levine & Jana Winograde, "Showtime Execs Aim to Balance expansion with 'Boutique' Mentality," *The Hollywood Reporter*, August 2, 2019. https://www.hollywoodreporter.com/live-feed/showtime-execs-aim-balance-expansion-boutique-mentality-1228960

DIGITAL PLATFORM LOCATIONS

As noted previously, the number of new projects produced on digital platforms increased from 41 last year to 76 this year. Of these, a total of 70 new projects this year went straight-to-series, including 55 one-hour and 15 half-hour shows.

Looking at the locations where these new digital projects were filmed, California once again led with 24 projects, representing the location of choice for approximately 31.5 percent of the sample.

LOCATIONS FOR NEW DIGITAL STREAMING SHOWS: 2018-19



Production locations for these new digital projects were very widely distributed, especially compared to broadcast and even cable shows. After California, a diverse assortment of U.S. jurisdictions comprised the second largest share of this activity (11 shows), followed by New York (9), and Vancouver (8). Georgia and "Other Foreign" tied in fourth place with six shows, followed by Toronto (5), UK (4) and New Mexico (3).

Other U.S. locations include two new shows shot in North Carolina, two in Louisiana, one in Alabama, Massachusetts, Illinois, Oregon, Utah, South Carolina and New Jersey. The six foreign locations include two in Canada (outside Vancouver and Toronto), two in New Zealand, and one show each in Hungary the Dominican Republic.

This year, the three leading digital platforms for new projects were Netflix© (31 projects), followed by Hulu© (16 projects), while Amazon© and Apple© tied for third place with eight new projects each. Comparing this to last year's activity, Amazon was the leader (with 14 projects), followed by Netflix (12) and Hulu (6).

This underscores Netflix's rise as an original content creator as their business model transitions from that of a licensor. A breakdown of Netflix's new 31 show locations are as follows: California (12 new shows), Canada (8), New Mexico (3), New York (2), and Georgia (2). The remaining four projects were filmed in Massachusetts, South Carolina, Hungary, and the Dominican Republic.

DIGITAL PLATFORM	1 HOUR	1/2 HOUR	TOTAL
Netflix	25	6	31
Hulu	12	4	16
Apple TV+	4	4	8
Amazon	6	2	8
CBS All Access	4	-	4
Disney+	4	-	4
DC Universe	2	-	2
YouTube	1	1	2
Facebook Watch	1	-	1
TOTAL	**59**	**17**	**76**

SUMMARY OF ALL NEW PROJECTS BY PRODUCTION LOCATION

To summarize new project activity on all three television platforms this year, FilmLA counted a total of 196 scripted new projects, comprised of 139 one-hour, and 57 half-hour shows.

Across all three platforms this year, a total of 72 new projects shot in California (28 one-hour and 44 half-hour), representing approximately 36.7 percent of all new projects. This represents an annual yield increase of 10.7 percent from 2017–18 when a total of 65 new shows were shot in the Golden State. The 72 new projects that California captured this year is, however, roughly 25 percent fewer than were captured during the 2012–13 development cycle, when a total of 96 shows were produced in the state.

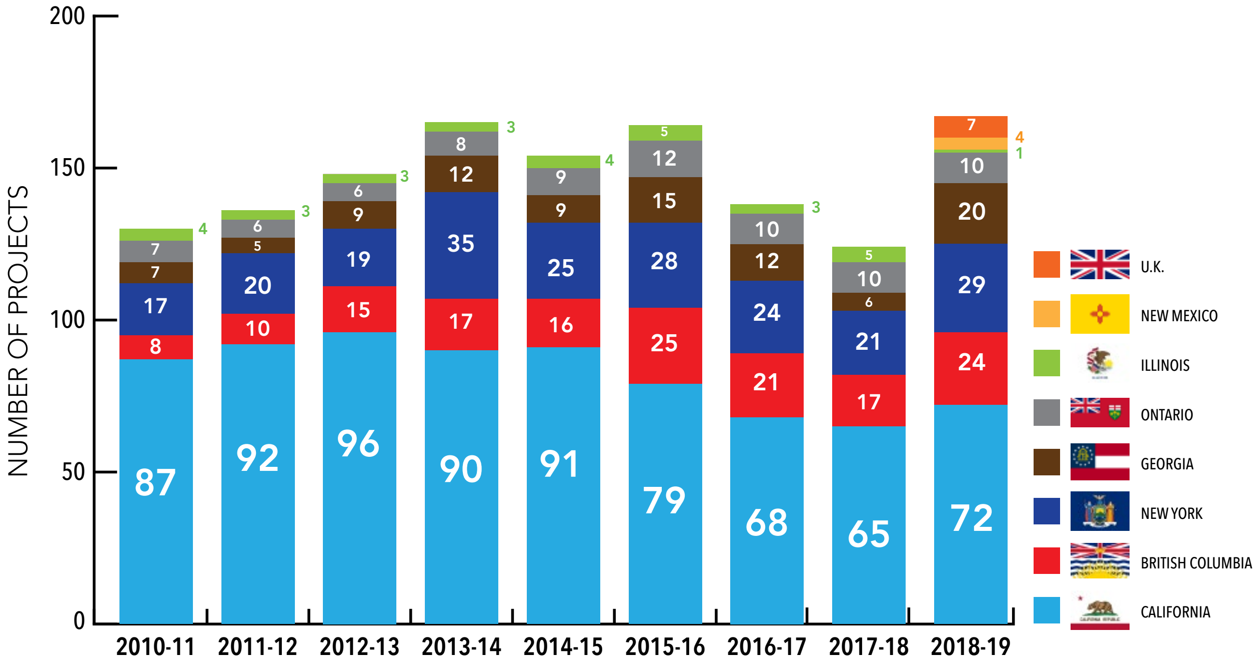
Other locations are seeing the benefits of hosting new projects. In the 2018–19 cycle, there were 124 projects shot outside California in competing jurisdictions.

Since 2010–11, the top six production locations for new shows have included California, New York, British Columbia, Ontario, Georgia and Illinois. Some form of film incentive and/or infrastructure is available in every one of these locations.

Looking at which cities, states and countries are reaping the benefits of new project production, FilmLA's analysis shows that the top six locations from previous years — California, New York, British Columbia, Georgia, Ontario and Illinois — account for approximately 79.6 percent of the 196 new projects in the 2018–19 production cycle.

One noteworthy change from the previous year is the number of new projects shot in Georgia, which more than tripled from a total of 6 to 20 in one year. As this report went to print, pending legislation in Georgia has induced some studios/networks to reconsider filming in the state.[8] The potential impact of this legislation on production levels in the Peach State remains to be seen.

TOP TELEVISION PROJECT LOCATIONS, BY PROJECT COUNT



Another notable change compared to previous years is declined activity in Illinois. An average of four new projects shot in Chicago in previous years; this year, only one new project was made there. Part of the reason may have been uncertainty over the state tax credit. Illinois recently extended its tax credit to 2026 in order to keep recurring shows like *Chicago Fire* from leaving the state.[9]

Finally, new top two project destinations for this development cycle include the U.K., with seven projects and New Mexico, with four. Both jurisdictions offer competitive tax incentives and infrastructure. In addition to world-class studios, the U.K. offers a payable cash rebate of up to 25 percent on qualifying U.K. expenditures. New Mexico offers a 30 percent refundable tax credit on TV projects (25 percent for film) and recently revised their legislation to attract long-term investments from film companies (discussed later in this report). Netflix will reportedly spend $100 million every year on production in New Mexico for the next 10 years.[10]

8 Bryn Elise Sandberg, "States Race to Poach Georgia Film and TV Projects Amid Hollywood Boycott Calls," *The Hollywood Reporter*, June 4, 2019. https://www.hollywoodreporter.com/news/states-race-poach-georgia-film-tv-projects-boycott-calls-1215532

9 Dan Petrella, "State extends film tax credits to keep 'Chicago Fire' and other productions in Illinois…," *Chicago Tribune*, August 1, 2019. https://www.chicagotribune.com/politics/ct-jb-pritzker-illinois-film-industry-20190801-x3h6c6uygbg2zbksawptynv52u-story.html

10 *Variety* Staff, "New Mexico Raises Annual Cap on Refundable Film and TV Tax Credit," *Variety*. April 26, 2019. https://variety.com/2019/artisans/production/new-mexico-production-incentives-tax-credit-1203197117/

SUMMARY OF ALL NEW PROJECTS BY DURATION

In 2018–19, California captured approximately 20 percent (28 count) of new one-hour projects (139 total). This percentage remains unchanged from the last cycle. While it was not the lowest market share for-one-hour projects on record, California's present share is well below its peak in 2006–07, when the state captured a commanding 63 percent. In recent years, California's considerable loss of one-hour project share is directly tied to a combination of incentive-fueled competition, plus a lack of stage space due to the increase in digital production and the need for studio/stage space.

In 2018–19, FilmLA counted 44 new half-hour projects produced in California. This means that California was the production location for approximately 77 percent of all new half-hour projects (57 total) were made this year. This is consistent with last year, when a total of 44 new one-half hour shows were made in the state. California's overall share of new half-hour projects declined slightly, from 83 percent in 2017–18 to 77 percent this year.

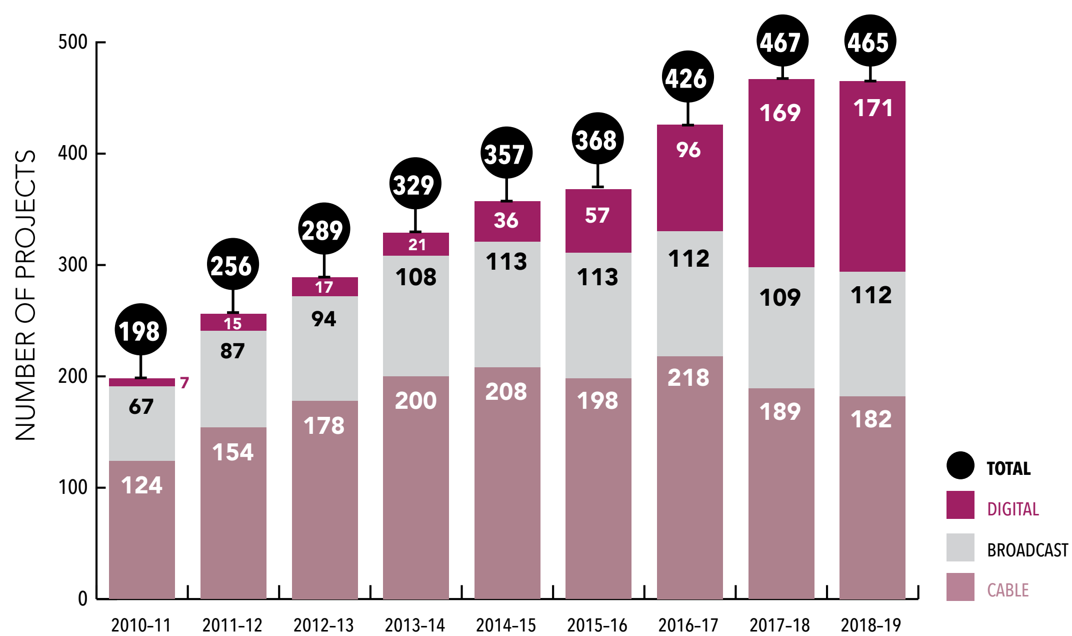
THE OVERALL SCRIPTED SERIES LANDSCAPE

According to FilmLA's count for the 2018–19 cycle, there are a total of approximately 465 scripted series that aired across all three television platforms. The majority of these series are recurring but may also include new series available for viewing that are part of the production cycle. The count also excludes non-English language co-productions.

According to FilmLA's count, the 465 scripted series that aired this year consisted of 112 broadcast shows, 182 cable shows, and 171 digital shows. It also includes 281 one-hour and 184 half-hour series.

Looking at the change in the number of series on each of the three distribution platforms between 2010–11 and the current season, cable series experienced the slowest growth (47 percent), followed by broadcast series (67 percent). The number of digital series aired, however, grew by more than 2,300 percent. Between 2010–11 and this past year, the number of live-action scripted digital series soared from a total of 7 to 171, within eight years' time. The number of cable series declined from a peak of 218 in 2016–17. Broadcast television series peaked at 113 shows in both years 2014–15 and 2015–16.

NUMBER OF LIVE-ACTION SCRIPTED SERIES PRODUCED BY U.S. STUDIOS: 2018–19



PENDING PROJECTS

Interestingly, FilmLA's research estimates that approximately 144 scripted projects picked up to series (part of the 196 new projects produced this cycle) are not yet available for viewing. This includes 31 broadcast, 51 cable and 62 digital series. Since these series have not yet aired, they were not counted in this year's totals.

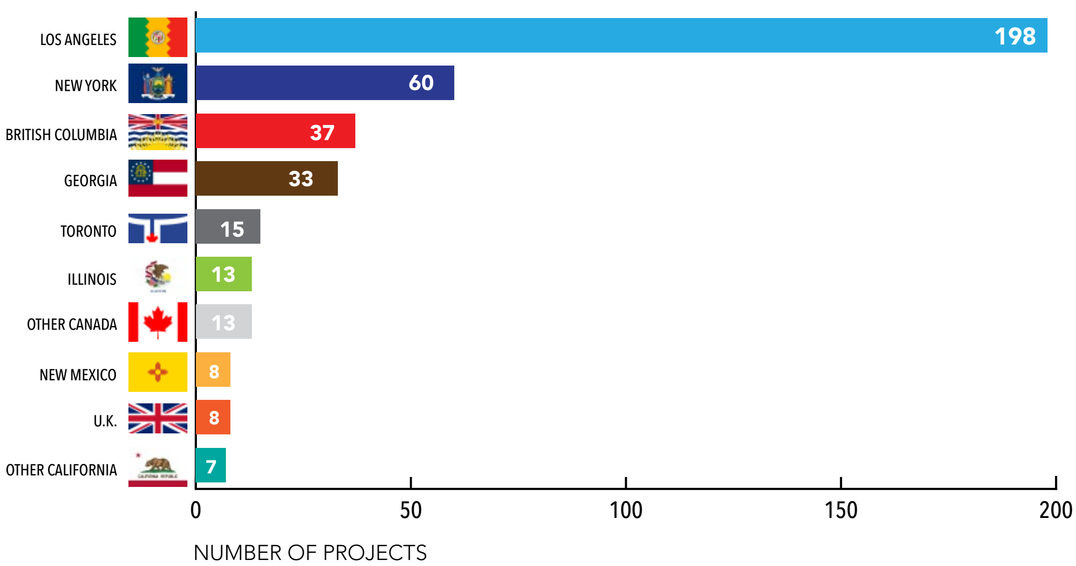
These 144 completed series, in addition to other recurring series that are picked up, will screen for additional seasons and will likely be counted in FilmLA's "2020 Television Report." This again confirms that a significant amount of new content is in the pipeline, with digital platforms leading the charge.

PRODUCTION LOCATIONS

A breakdown of production locations for the 465 scripted shows in our count once again identifies Los Angeles/California as the top series production location. By FilmLA's count, a total of 198 scripted series were shot in Los Angeles, with an additional seven filmed in other parts of California. California therefore captured a market share of 44 percent of the scripted series this year.

In all, seven locations hosted ten or more series in 2018–19. This includes Los Angeles (198 count), New York (60), Vancouver (37), Georgia (33), Toronto (15), Chicago (13) and other Canadian locations (13). These leading seven production locations accounted for approximately 79.3 percent of all series produced by U.S. networks/companies for a total of 369 shows.

LIVE-ACTION SCRIPTED SERIES BY FILMING LOCATION: 2018-19



THE INFLUENCE OF DIGITAL STREAMING SERVICES

The impact that digital streaming services are having on the television and entertainment industry cannot be overstated. As illustrated, the fastest growth in television content — for both new projects and live-action scripted series — is being generated by the streaming platforms. In one year alone, the number of new projects they produced nearly doubled, and there are plenty more shows in the pipeline. As noted, by FilmLA's count, twice as many digital scripted shows have been completed and are awaiting an air date (62 total) compared to broadcast television (31 total).

The Big Three digital networks — Netflix, Amazon and Hulu[11] — are about to become the Big Five with the addition of Disney+ and Apple TV+ in November 2019. In early 2020, the Big Five will be also be joined by HBO Max, NBCUniversal/Peacock and Quibi (which will focus on short form content). This is in addition to the current, albeit smaller, existing players like Facebook Watch, YouTube Premium, and DC Universe™, which will continue to produce original content.

At the time of preparing this report, the recently announced ViacomCBS merger, which is pending regulatory approval and is expected to be completed later this year, will add more spending and content from CBS All Access©, Showtime® Anytime and Pluto TV©.

All of these new streaming platforms have recently unveiled lineups of exclusive content. The major studios have their existing libraries of film and television product but also plan to offer new, original series as well. The studio networks are creating series tied to the intellectual properties they own. An example is Disney+'s *The Mandalorian*, which is a *Star Wars* spin-off, with plans to develop two other *Star Wars* series for their new streaming platform.

How much original content these players produce and where these projects are filmed remain to be seen, as the majority of the recently announced new projects are either in the development or pre-production stages. Which jurisdictions will capture these new shows will depend on a combination of competitive tax incentives, crew depth and infrastructure.

11 **NOTE:** With the recent Disney/Fox merger, Hulu is now fully controlled and majority-owned by a business segment of the Walt Disney Company. At the time of preparing this report, Disney has also announced plans to bundle Disney+ with ESPN+ and Hulu.
https://variety.com/2019/biz/news/disney-plus-espn-hulu-bundle-1203294270/

PHOTO: Gerry Boughan/ Shutterstock.com

THE ESTABLISHMENT OF PRODUCTION HUBS BY DIGITAL PLATFORMS OUTSIDE OF CALIFORNIA

Digital platforms have had a major impact both on commercial real estate and stage space in Los Angeles and abroad.

In a race to lease or acquire stage space, studios and networks are establishing production hubs wherever suitable infrastructure can be found. To date, Netflix has been the most aggressive player, establishing hubs in California, New Mexico, Ontario, New York and the U.K. The company has also set up long-term leases on stages and office space in major markets throughout the world.

Within the past three years in Los Angeles, an estimated four million square feet of office space has been rented by content creators such as Netflix, Google, and Amazon; with an additional 2.3 million square feet reportedly planned for lease. Netflix also plans to move into 1.6 million square feet of space in Hollywood, which includes its current lease deals.[12] Finally, Amazon Studios, Apple and HBO have plans to set up offices in Culver City, California, which lies within the 30-mile Studio Zone.

In late 2018, Netflix bought Albuquerque Studios, which includes eight sound stages with 132,000 square feet of space.[13] The company also announced in April that it is planning to build out a production hub in Brooklyn, New York, from a former warehouse, that will include six new sound stages, in addition to leasing 100,000 square feet of space in New York City.[14] Furthermore, Netflix has agreed to lease two studio spaces in Toronto for a total of eight stages at Cinespace and Pinewood Studios, respectively.[15] More recently, the company established a deal to set up a permanent production base at Shepperton Studios in England.

Other companies that have recently announced plans to build production hubs outside of Los Angeles include NBCUniversal and CBS. In June, NBCUniversal announced that it is planning to redevelop a warehouse space, just outside of Albuquerque, New Mexico. Upon completion of the studio conversion, estimated to cost $4 million, the new facility will be used by NBCUniversal to produce scripted content for many platforms, including broadcast and cable channels.[16] As part of the deal, the state of New Mexico and the city of Albuquerque have pledged public support.

New Mexico's Film Production Tax Credit Act, effective July 1st, establishes an exemption for partnership production studios that agree to purchase or lease a facility in the state for at least 10 years. The work done by these partners is exempt from the cap, which currently stands at $110 million. The Land of Enchantment was one of the first to introduce film incentives and currently offers a 25 percent refundable tax credit on qualified spending, with an additional 5 percent for television shows spending a minimum of $50,000 per episode on 6 or more episodes.

Last year, CBS announced plans to build six stages outside of Toronto to be known as CBS Stages Canada.[17] CBS All Access currently shoots *Star Trek: Discovery* at Pinewood Toronto Studios.

On top of these acquisitions and planned stage construction, some of the major studios creating streaming platforms such as Disney (Disney+) and Warner Bros. (HBO Max) have already acquired major production assets abroad. In 2010, Warner Bros. purchased Warner Leavesden Studios in England. With the recent Disney/Fox merger this year, The Walt Disney Company now owns Fox Studios Australia in Sydney.

These recent deals demonstrate how the surge in content and production activity levels from the streaming platforms have been driving demand for available sound stage and office space both locally and globally. The recent acquisitions and long-term lease agreements underscore content producers' need to ensure that the current boom in demand for studio space does not hinder their plans to produce content.

It is likely that more production hubs will continue to be established outside of Los Angeles/California, as other states like New Mexico respond to this demand with attractive incentives to capture a slice of this exploding market.

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12 Roger Vincent, "Tech titans fuel a scramble to build large-scale offices," *Los Angeles Times*, April, 2019. https://enewspaper.latimes.com/infinity/article_share.aspx?guid=551264e2-9960-4d3c-885c-6f5cf5576b41

13 Todd Spangler, "Netflix Is Paying Less than $30 Million for Albuquerque Studios, Which Cost $91 Million to Build," *Variety*, October 16, 2018. https://variety.com/2018/digital/news/netflix-albuquerque-studios-deal-terms-30-million-1202981274/

14 Ryan Deffenbaugh, "Netflix plans $100 million expansion in Manhattan, Brooklyn," *Crain's New York Business*, April 18, 2019. https://www.crainsnewyork.com/real-estate/netflix-plans-100-million-expansion-manhattan-brooklyn

15 John Hazelton, "Netflix expands Canadian footprint," *Screen Daily*, February 19, 2019. https://www.screendaily.com/news/netflix-expands-canadian-footprint/5137093.article

16 David Robb, "NBC Universal Reaches 10-Year, $500-Million Production Deal to Film Shows in Albuquerque," *Deadline*, June 14, 2019. https://deadline.com/2019/06/nbcuniversal-reaches-10-year-500-million-production-deal-to-film-shows-in-albuquerque-1202632811/

17 Etan Vlessing, "CBS Unveils Plans for Toronto Production Studio," *The Hollywood Reporter*, September 26, 2018. https://www.hollywoodreporter.com/news/cbs-unveils-toronto-production-studio-plans-1147122

ESTIMATED CONTENT SPEND BY STREAMING NETWORKS

Collectively, the Big Five digital networks are estimated to spend between $27 and $28 billion this year (2019) on content.[18] This is exclusive of spending by ViacomCBS.

Netflix spent $12 billion on content in 2018 and Wall Street analysts project that number to reach $15 billion this year.[19] The remaining $12–$13 billion is projected to be split between Amazon ($5B), Hulu ($2.5B), HBO ($2.5B) [20], Apple TV+ ($2B), and Disney+ ($500M).[21]

To put the scale of this massive investment by the Big Five streamers into perspective:

- Wall Street firms made a comparable $27.3 billion in pre-tax profits last year, which was their largest gain since 2010.[22] In other words, the Big Five streaming firms are expected to spend in one year roughly what Wall Street grossed over a similar period.
- The U.S. and Canadian box office reached a high of $11.9 billion in theatrical admissions spend in 2018.[23] This means that total content spending by the Big Five will be 2.3 times greater than North America's richest-ever annual box office haul.
- The combined estimated budgets of the top 130 most expensive feature films ever made — ranging from *Avatar* ($425 million) to *Doctor Strange* ($160 million) — total just over $27 billion.[24]

Not all spending by the streamers will be for television series, nor will it be entirely allocated to scripted content. Most of the existing and new streamers also plan to create movies for their platforms (Netflix's Sandra Bullock thriller – *Bird Box* – is a recent example), as well as other content forms familiar to viewers like animation, reality TV, news programming, etc.

These alternate content forms are not tracked in this study. Nonetheless, with the sheer scale of spending and the aforementioned 62 digital scripted series "in the can," it can be safely assumed that the number of scripted shows on air will increase substantially in the near future.

18 **NOTE:** This includes estimated spend by HBO Max, which was originally set to launch in beta later in 2019, with an official release in spring 2020.

19 Todd Spangler, "Netflix Spent $12 Billion on Content in 2018. Analysts Expect That to Grow to $15 Billion This Year," *Variety*, January 18, 2019. https://variety.com/2019/digital/news/netflix-content-spending-2019-15-billion-1203112090/

20 **NOTE:** This figure represents what was spent by HBO last year. Separate figures for estimated spend for HBO Max are not available.

21 Dan Clarendon, "Here's How Much Apple, Netflix, Amazon & More Spend on Programming," *TV Insider*. April 5, 2019. https://www.tvinsider.com/765797/streaming-networks-spend-apple-netflix-amazon/

22 Matt Egan, "Wall Street firms made $27 billion last year. That's the biggest haul since 2010." *CNN Business*. March 26, 2019.

23 Motion Picture Association. "2018 Theme Report." p. 15.

24 This is based on feature film budgets obtained from The Numbers® – a website of Nash Services LLC, which provides financial data and services to entertainment and finance industries. https://www.the-numbers.com/

PHOTO: Ivan Marc / Shutterstock.com

OTHER NOTABLE TELEVISION PRODUCTION TRENDS

As noted, the rise of the streamers has impacted the quantity of new shows in production and demand for global real estate market and production infrastructure. The following production trends are also worthy of note, since they are altering the television landscape.

RISING PRODUCTION COSTS: THE ERA OF "TENTPOLE TV"

To remain competitive in the crowded content market, the television platforms, most notably cable and digital, are spending large sums of money on scripted series. The race to attract viewer attention against hundreds of competing series and $200+ million feature films, is ushering in a new era of "Tentpole TV."

When it comes to one-hour series, the budget for many of today's top shows approaches or exceeds $100 million per season. For comparative purposes, the average budget for the 10 highest grossing feature films at the box office last year was approximately $175 million.[25]

Nearly two years ago, the cost to produce high-end cable and streaming dramas was in the range of $5 million to $7 million per hour/episode, with broadcast networks dramas in the range of $1.5 million to $3 million.[26]

The average qualified spend for television productions receiving the California Film & Television Tax Credit is estimated at approximately $4.7 million per episode.[27] However, this represents only the qualified spend for the tax credit, and excludes other costs such as above-the-line talent, etc. In other words, the actual budgets for these productions are likely much higher, but they cannot be verified by the California Film Commission ("CFC") due to the fact that episode and budget costs are proprietary. Depending on the number of episodes ordered, the price of an entire season of television today can cost from $35 to 100+ million.

Big-budget series continue to proliferate on cable and digital networks as they seek to establish a "brand" to attract viewers. In 2017, *Variety* predicted we would soon see spends reach $20 million per episode. Some of the more high-profile/high-budget television projects recently announced and/or completed include the following:

- The HBO hit series, *Game of Thrones*, reportedly cost $15 million per episode (6 episodes) in the eighth and final season.[28] This makes it the most expensive series, per episode, that has aired to date.

- Apple TV+ is spending an estimated $15 million per episode on an upcoming, green-lit show, *See*, which is a one-hour drama starring Jason Momoa.[29]

- Amazon paid a reported $250 million in a bidding war for the rights to the *Lord of the Rings* franchise, which they are adapting into a television series.[30] This price includes only the rights to the franchise and excludes the cost to develop the series and hire talent above and below the line.

With the rise of Tentpole TV and its sky-high production budgets, the streamers will likely option a considerable amount of inexpensive, non-scripted programming like reality television to fill in their libraries. In other words, the cable and streaming platforms will have high-budget premium content in conjunction with low-cost, high-margin product.

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25 **NOTE:** This information is based on a combination of available 2018 box office data from the database - The Numbers® and IMDbPro.

26 Maureen Ryan and Cynthia Littleton, "TV Series Budgets Hit the Breaking Point as Costs Skyrocket in Peak TV Era," *Variety*, September 26, 2017. https://variety.com/2017/tv/news/tv-series-budgets-costs-rising-peak-tv-1202570158/

27 **NOTE:** This is based on Program 2.0 data obtained from the California Film Commission, which FilmLA obtained by dividing the qualified spend into the number of episodes per season. Data retrieved August 15, 2019. http://film.ca.gov/wp-content/uploads/2.0-CFC-Approved-Projects-List-07.29.19.pdf

28 Emmie Martin, "Here's how much it cost to produce on episode of 'Game of Thrones,'" CNBC, April 14, 2019. https://www.cnbc.com/2019/04/12/how-much-it-costs-to-produce-an-episode-of-game-of-thrones.html

29 Andy Meek, "Apple is spending up to $15M per episode on its TV shows, as Netflix starts spending less," Yahoo News, July 11, 2019. https://news.yahoo.com/apple-spending-15m-per-episode-211302680.html

30 Rob Cain, "Amazon's $250M 'Lord of the Rings' Purchase Price is 1,000 Times What Tolkien First Got for It," *Forbes*, November 14, 2017. https://www.forbes.com/sites/robcain/2017/11/14/amazons-250m-lord-of-the-rings-purchase-price-is-1000-times-what-tolkein-first-got-for-it/#be120e172732

FEWER EPISODES PER SEASON

Perhaps in response to rising per episode production costs, producers across all three television platforms appear to be making fewer episodes per season. Both cable and digital television platforms used to run scripted dramas for 10 to 12 episodes per season, but today's shows include as few as six.

For example, the HBO drama – *The Divorce* – which is currently in Season 3, started with 10 and eight episodes in seasons 1 and 2, respectively. However, in Season 3, the series has been shortened to six episodes. The same is true for HBO's *Game of Thrones*. The first six seasons featured 10 episodes, season 7 was down to seven episodes, and the eighth and final season consisted of only six episodes.

Most digital streaming series tend to run between eight and 13 episodes per season, with eight to 10 episodes being the current norm.

For traditional network television, a season typically runs for 20 to 26 episodes. In recent years, however, scripted shows such as *Will & Grace* have aired 18 episodes. The final season of *Crazy Ex-Girlfriend* also shot 18 episodes.

The shortened seasons have also given rise to renewed interest in so-called "Limited Series," which run for five to six episodes. This genre is also appealing to A-list talent who want to commit to a project that is limited to a specific duration of time. Some series start off as a limited series and turn into a recurring show. For example, HBO's hit series, *Big Little Lies*, started off as a limited series with seven episodes in Season 1. Due to its critical and consumer success, however, the show was extended for a second season with an additional seven episodes.

YEAR-ROUND PRODUCTION SEASON

As noted, most digital platforms order their projects straight-to-series and bypass the traditional pilot phase. In contrast to traditional network television, with the streamers there is no upfront event to work toward and thus no official "pilot" or "television season."

In the past, the network television production season typically ran from August through April, with pilots being shot during the off-season (typically January through April). Cable television shows followed a more flexible production schedule.

Streaming networks, by contrast, shoot their series year-round, depending on a combination of intended air dates, plus the availability of talent, crew, stage space and support services. This has placed pressure on available stage space both locally and globally. The increase in content by the streamers and subsequent waning availability of stages has only escalated the race to lease or acquire studio space.

As FilmLA revealed in its "2017 Soundstage Production Report," the hundreds of sound stages in Los Angeles have been in extremely high demand, and occupancy rates trend above 90 percent at most major studios. "For filming that took place on certified sound stages in 2016, the overwhelming number of shoot days were for scripted television (both one-hour and half-hour series) which accounted for 75% of all stage shoot days in 2016."[31]

Anecdotally, the story is the same for other production centers like Vancouver, Toronto, New York, Atlanta and London, where production space is at a premium. Even in Greater Los Angeles, high soundstage occupancy has forced many productions to build their sets in industrial spaces or converted warehouses.

To meet this increased demand, several studios in Los Angeles have also recently been built. This includes the new, purpose-built Quixote Studios in Pacoima (North Valley Studios), and LA North Studios, which is an adaptive re-use of a former warehouse in Santa Clarita. Another new, purpose-built facility in Sun Valley – Line 204 – is set to open later this year.

31 FilmLA. 2017 Sound Stage Production Report, "Trends in Sound Stage Filming", Page 5.

PHOTO: Hilary Bronwyn Gayle / HBO / *Big Little Lies*

FOCUS ON CALIFORNIA

As noted, California is the top production location for new projects on broadcast, cable and digital platforms, as well as recurring live-action scripted series that aired this year.

THE CALIFORNIA FILM & TV TAX CREDIT PROGRAM

Much of California's success in television production and retention can be attributed to the California Film & TV Tax Credit Program ("CFTTC"). Under the improved 2.0 program, enacted in 2014, eligibility for one-hour series applies to all shows regardless of distribution media. Under the original program enacted in 2009, only new basic cable series and series for any distribution outlet relocating to California were eligible for the incentive.

The current Program 2.0 sunsets in June 2020. The new Program 3.0 was signed into law last year and will run from July 2020 to 2025. The program is funded at $330 million annually.

Scripted television production in Los Angeles is increasingly driven by the CFTTC. In the second quarter of 2019, a total 51.7 percent of L.A. area TV Drama shoot days came from incentivized series – a new milestone. Meanwhile, incentivized projects comprised 20.8 percent of L.A.'s on-location TV Comedy production.[32]

During the 2018-19 cycle, a total of 26 incentivized television shows were enrolled in the state program. This includes eight network shows, 13 cable shows and five digital shows. Together, these 26 shows hired a total of 4,693 cast, 5,277 crew, and 101,754 extras.[33] Total qualified expenditures under the tax credit program were approximately $1.2 billion. Again, it should be noted that the total spending/budgets for such projects are significantly higher than qualified spending, since they include above-the-line wages (i.e., producers, directors, and cast) and other production expenditures that do not qualify for tax credits under Program 2.0.

That means that the budget for a project like *Westworld* is in reality much higher than its qualified spend of approximately $100 million.

32 FilmLA. "2019 Second Quarter Stats." https://www.filmla.com/scripted-tv-still-the-bright-spot-in-l-a-production-picture/

33 Analysis courtesy of the California Film Commission.

PHOTO: HBO / *Westworld*

PROJECTS RECEIVING THE CALIFORNIA FILM & TELEVISION TAX CREDIT

	PROJECT TITLE	PLATFORM	CAST	CREW	EXTRAS	TOTAL QUALIFIED EXPENDITURES
BROADCAST	*American Horror Story* - Season 9 (recurring)	FOX	210	172	2,087	$43,318,000
	Crazy Ex-Girlfriend - Season 4 (recurring)	CW	8	260	2,430	$41,195,000
	Good Girls - Season 2 (relocated)	NBC	9	245	3,900	$37,178,000
	S.W.A.T. - Season 3 (recurring)	CBS	704	220	8,822	$92,939,000
	The Rookie - Season 1.5 (recurring)	ABC	127	170	2,464	$22,632,000
	The Rookie - Season 2 (recurring)	ABC	368	162	8,211	$70,497,000
	This is Us - Season 4 (recurring)	ABC	304	211	3,781	$63,596,000
	Timeless - Season 2.5 (relocated)	NBC	37	225	582	$7,330,000
	TOTAL	**8**	**1,767**	**1,665**	**32,277**	**$378,685,000**
CABLE	*Animal Kingdom* - Season 4 (recurring)	TNT	160	175	2,249	$36,951,000
	Ballers - Season 5 (recurring)	HBO	106	210	4,624	$35,293,000
	Euphoria - Season 1 (new - recurring)	HBO	149	235	3,586	$41,627,000
	Good Trouble - Season 2 (recurring)	Freeform	280	167	2,816	$33,008,000
	Good Trouble - Season 2.5 (recurring)	Freeform	35	167	265	$4,435,000
	Legion - Season 3 (recurring)	FX	30	118	1,600	$43,700,000
	The Mayans MC - Season 2 (recurring)	FX	217	167	1,680	$37,712,000
	Penny Dreadful - Season 4 (relocating)	Showtime	352	150	10,230	$98,980,000
	Perry Mason - Season 1 (new)	HBO	361	325	5,445	$74,272,000
	Snowfall - Season 3 (recurring)	FX	85	125	2,050	$35,329,000
	The Affair - Season 5 (relocated)	Showtime	171	85	3,420	$37,995,000
	Westworld - Season 3 (recurring)	HBO	75	200	7,300	$99,952,000
	You - Season 2 (relocated)	Lifetime	200	175	3,160	$24,249,000
	TOTAL	**13**	**2,221**	**2,299**	**48,425**	**$603,503,000**
DIGITAL	*13 Reasons Why* - Season 4 (recurring)	Netflix	80	175	9,945	$58,467,000
	The Orville - Season 3 (recurring)	Hulu	214	238	3,097	$75,147,000
	Star Trek: Picard - Season 1 (new)	CBS All Access	72	300	2,150	$75,575,000
	Strange Angel - Season 2 (recurring)	CBS All Access	171	300	3,060	$52,458,000
	Why Women Kill - Season 1 (new)	CBS All Access	168	300	2,800	$42,127,000
	TOTAL	**5**	**705**	**1,313**	**21,052**	**$303,774,000**
	GRAND TOTAL		**4,693**	**5,277**	**101,754**	**$1,285,962,000**

Looking at the average show hires and spend this year, qualified spend for the tax credit for all shows averaged approximately $49.5 million, with an average of 180 cast, 200 crew and 3,900 extras employed per series.

Two of the projects receiving the credit this year — *Westworld* ($100 million) and *Penny Dreadful* ($99 million) — have qualified spending equaling many big-budget feature films. In fact, only 27 of the top 100 highest-grossing feature films at the North American box office in 2018 had budgets in excess of $100 million.[34]

In terms of expenditures, California's largest series to date — HBO's *Westworld* — has generated approximately $258 million in qualified spending during its three seasons in California, hired approximately 600 cast members, 820 crew and an additional 14,000 background performers/extras. This is followed closely by the three seasons and pilot of the CBS television series, *S.W.A.T.* Since its pilot was shot in 2016-17 cycle, *S.W.A.T.* has generated an estimated qualified spend of $249.8 million. The show hires for *S.W.A.T.* are even greater than *Westworld* at an estimated total of approximately 2,000 cast members, an additional 970 crew, and approximately 26,400 additional background performers/extras to date. Again, these numbers demonstrate the significant impact that a television series can generate both on local employment and spending.

34 **NOTE:** This information is based on a combination of 2018 box office data from the databases, The Numbers and IMDbPro.

Also, worth noting is the rise in the number of productions shooting outside the Greater Los Angeles region. In addition to the 20 percent non-transferable tax credit, the CFTTC offers an additional 5 percent credit for filming outside the 30-mile Studio Zone. Capturing this benefit, the incentivized Netflix series, *13 Reasons Why*, shoots on a sound stage on Mare Island in Vallejo, in addition to other locations nearby.

Other non-incentivized series that shot in other parts of California and aired this year include *Big Little Lies* (HBO), *Escape the Night* (YouTube Premium), *Ingobernable* (Netflix), *Veronica Mars* (Hulu), *What/If* (Netflix), and *Tales from the City* (Netflix).

RELOCATED SERIES UNDER THE CALIFORNIA FILM & TV TAX CREDIT PROGRAM

As discussed throughout this report, most television projects choose production locations based on a combination of attractive incentives, available crew and infrastructure. As the seat of the domestic entertainment industry, California has all three.

The CFTTC offers a 25 percent non-transferable tax credit for relocating TV series. To date, a total of 16 individual series have relocated to Los Angeles due to the incentives provided by the program. This includes four shows from Canada (British Columbia), four from New York, two from Louisiana and one from Georgia. The remaining five shows relocated from Texas, Florida, Ireland, North Carolina and Maryland, respectively. Showtime's *Penny Dreadful: City of Angels* is the latest TV series to relocate, with tax credits north of $20 million.

Inclusive of recurring seasons, these 16 relocated series have hired a total of 5,820 cast, 5,734 crew members, and an additional 114,750 background performers/extras. Qualified state spend from these 16 relocated shows is roughly $1.1 billion.

In summary, the impact that television series have had in California, both in terms of spending and employment, is significant. California needs to maintain its competitive position in TV, to which the CFTTC is clearly and inextricably linked.

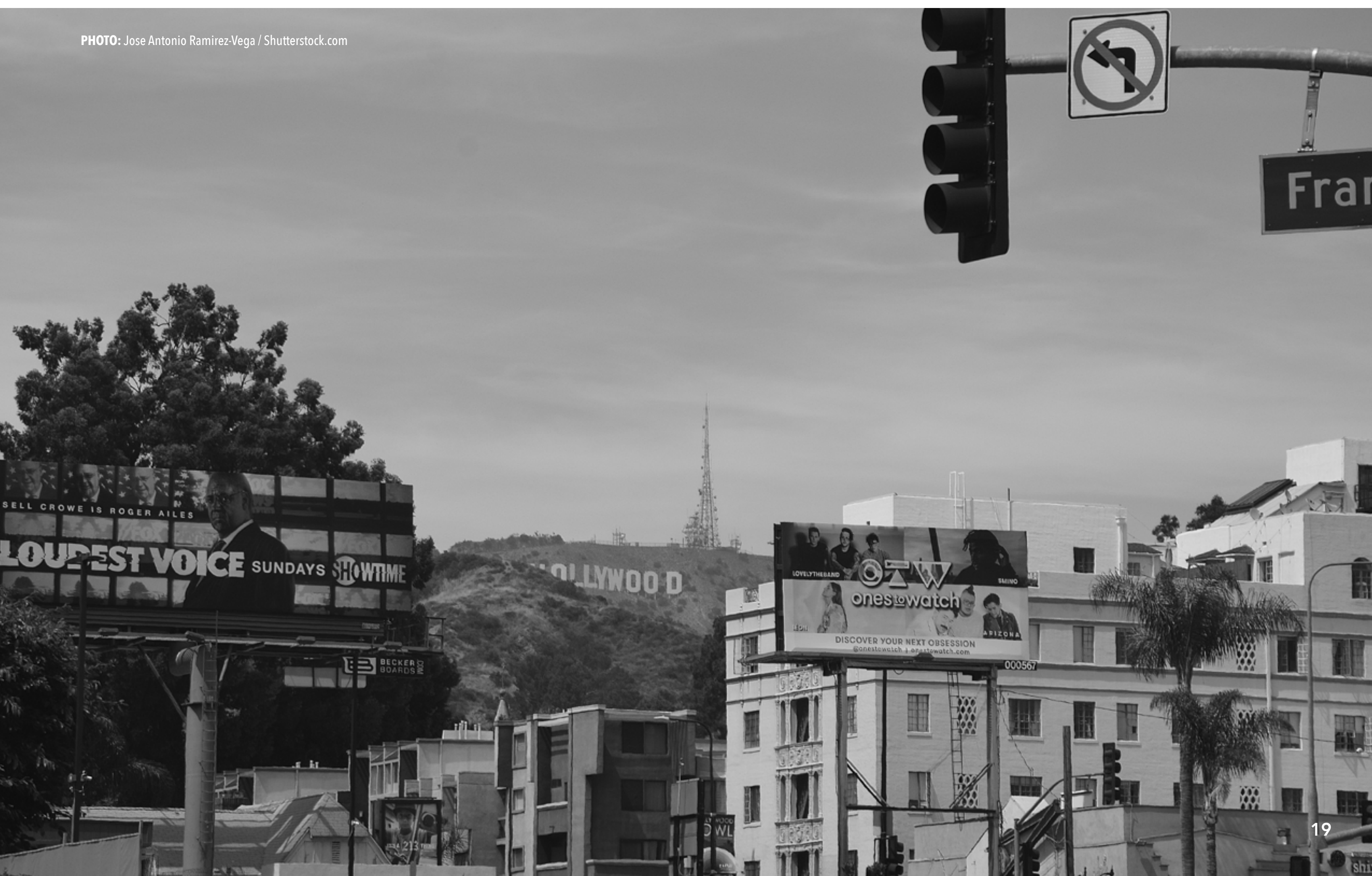

PHOTO: Jose Antonio Ramirez-Vega / Shutterstock.com

ALL RELOCATING TV SERIES RECEIVING THE CALIFORNIA FILM & TELEVISION TAX CREDIT

PROJECT TITLE	CAST	CREW	BACKGROUND	TOTAL QUALIFIED SPEND	RELOCATED FROM
American Crime - Season 3	164	127	1,436	$20,043,000	Texas
American Horror Story - Season 5	290	152	3,940	$39,158,000	Louisiana
American Horror Story - Season 6	252	168	2,255	$33,261,000	
American Horror Story - Season 7	217	173	2,847	$30,928,000	
American Horror Story - Season 8	225	196	2,090	$36,569,000	
American Horror Story - Season 9	210	172	2,087	$43,318,000	
Ballers - Season 3	157	189	2,224	$28,813,000	Florida
Ballers - Season 4	148	188	5,954	$28,213,000	
Ballers - Season 5	106	210	4,624	$35,293,000	
Good Girls - Season 2	9	245	3,900	$37,178,000	Georgia
Good Girls - Season 3	8	250	3,991	$43,728,000	
Legion - Season 2	224	121	3,516	$47,037,000	British Columbia
Legion - Season 3	30	118	1,600	$43,700,000	
Lucifer - Season 3	379	166	9,383	$61,231,000	British Columbia
Lucifer - Season 4	164	120	5,984	$35,782,000	
Lucifer - Season 5	159	117	5,875	$43,243,000	
Mistresses - Season 4	136	185	2,842	$21,903,000	British Columbia
Penny Dreadful: City of Angels - Season 4	352	150	10,230	$98,980,000	Ireland
Scream Queens - Season 2	141	207	2,570	$31,626,000	Louisiana
Secrets and Lies - Season 2	131	188	2,834	$23,331,000	North Carolina
Sneaky Pete - Season 4	236	220	2,930	$45,440,000	New York
Sneaky Pete - Season 5	236	220	2,510	$36,817,000	
The Affair - Season 4	217	132	3,135	$29,936,000	New York
The Affair - Season 5	171	85	3,420	$37,995,000	
The OA - Season 2	77	350	2,664	$32,812,000	New York
Timeless - Season 2	247	220	3,000	$39,829,000	British Columbia
Timeless - Season 2.5	37	225	582	$7,330,000	
Veep - Season 5	239	180	4,382	$26,795,000	Maryland
Veep - Season 6	196	290	4,825	$31,054,000	
Veep - Season 7	462	195	3,960	$36,110,000	
You - Season 2	200	175	3,160	$24,249,000	New York
TOTAL	**5,820**	**5,734**	**114,750**	**$1,131,702,000**	

CONCLUSION

To summarize FilmLA's findings related to California's television industry this year:

- Among all 465 scripted live action series that aired this year across broadcast, cable and digital channels, California was the production destination for approximately 44 percent of the projects.
- California captured approximately 50.7 percent of all new TV projects that were made for traditional broadcast networks this year. Half-hour series is where California is still predominant.
- California's share of new TV projects for cable television came in considerably lower, at approximately 26.4 percent.
- California's share of new projects on digital TV platforms finished somewhat in between, at approximately 31.5 percent. Production in this sector is seeing record growth.

Based on FilmLA's sample, the number of digital series that aired this year has increased by more than 2,300 percent since the 2010–11 cycle. Furthermore, the number of new projects produced by the streamers increased by 85.3 percent over the past year.

Thus, the television sector experiencing the fastest growth (digital) is the one that California will likely find the most challenging to retain, given its explosive increase in content and subsequent demand for space and services. With the introduction of three new major streaming players this year, and more coming in 2020, the number of new projects and recurring series in production should continue to increase.

These changing economics of the television industry have created intense pressure for major studios to build up their content libraries. Content spend for the Big Five this year alone is estimated at $27 billion — a figure that is comparable to what Wall Street earned last year and 2.3 times the size of the North American box office.

While California is no longer home to a significant share of big-budget feature films, the state is currently the top production destination for U.S. domestic television — both in new projects and returning series. But how long the Golden State can maintain its leading position in television remains to be seen.

PHOTO: pixinoo / Shutterstock.com

ABOUT THIS REPORT

For more than a decade, FILML.A., INC® Research has tracked television projects in development and has published several reports on this topic. Over time, the scope of FilmLA's tracking and reporting effort has grown.

The "2019 Television Production Report" offers a broader look at the overall television landscape, including notable trends, the impact of digital streaming services on the industry and the overall scripted television landscape both in California and jurisdictions across the world.

In prior works, FilmLA used the term "television pilot" (or simply, "pilot") to refer to all original scripted pilot and shorter-length presentations, as well as the first episode of any new episodic show ordered "straight-to-series." From 2018 onward, the term "pilot" has been replaced with "New Project", a term that is equally encompassing, but less ambiguous. Past FilmLA reports also made a distinction between drama projects (which were typically one hour in duration, less commercial time) and comedy projects (typically one half-hour in duration). We now categorize shows by running length, as opposed to their content.

FilmLA's series and new project counts within a development cycle include both stage-based and location-based projects produced in any location, of any running duration, intended for primetime airing on broadcast networks, cable networks, or online streaming services targeting U.S. audiences. Our counts include all series of which FilmLA is made aware through primary research (direct contact with studios, producers and film commissions, plus review of film permit records) and secondary research (industry trade publications, online subscription databases). Our aim in supplying these counts is to be thorough; errors of omission are, however, possible.

Except for estimates attributable directly to FilmLA and labeled as such in the text, all budget and spending figures referenced in this report were obtained from film incentive progress reports issued by state and foreign government jurisdictions, reputable news sources, or subscription databases, as attributed via footnote.

SOURCES

Annual Film Incentive Transparency Reports:

California
Louisiana
New York

Online Databases:

StudioSystem
Development Leads
IMDbPro
The Numbers®

Other:

California Film Comission
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