

2020 Television Report

Film
LA





6255 W. Sunset Blvd.
12th Floor
Hollywood, CA 90028

FilmLA.com

 @FilmLA

 FilmLA

 FilmLAinc

CREDITS:

Contributors:
Anne Wurts
Corina Sandru
Philip Sokoloski

Graphic Design:
Shane Hirschman

Photography:
Shutterstock
EPK.TV
Showtime

TABLE OF CONTENTS

INTRODUCTION	2
NEW SCRIPTED TELEVISION PROJECTS IN 2020	3
BROADCAST NETWORK TELEVISION LOCATIONS	6
CABLE TELEVISION LOCATIONS	7
STREAMING PLATFORM LOCATIONS	8
TOP PROJECT LOCATIONS FOR ALL NEW PROJECTS	9
LIVE-ACTION SCRIPTED TELEVISION PROJECTS THAT AIRED IN 2020	10
RENEWAL STATUS OF LIVE ACTION SCRIPTED SERIES	11
TOP TEN FILMING LOCATIONS FOR LIVE-ACTION SCRIPTED SERIES	12
THE IMPACT OF COVID-19 ON SCRIPTED TELEVISION PRODUCTION	13
APPENDIX	16
ABOUT THIS REPORT	18

INTRODUCTION

In recent years, the proliferation of streaming platforms has coincided with the era “Peak TV,”¹ with an ever-increasing number of new television shows available for viewing. The main focus of FilmLA’s 2019 Television Report was the explosion of television content on streaming services, which was being filmed in diversifying production hubs across the globe.² Since the study’s release, four new streaming platforms—Disney+®, Quibi®,³ Peacock® and HBO Max™—have entered the market, each with its own lineup of original, scripted content.

This year, in mid-March, the COVID-19 pandemic brought global television production to a sudden and unprecedented halt. The last time a pandemic hit U.S. shores in 1918, the television industry did not even exist. At the time of preparing this report,⁴ principal photography for U.S. scripted series has begun to restart, with a handful of shows resuming filming in August and September. More shows are slated to commence filming in October. While the networks and streamers managed to bring a large portion of their unscripted reality series back into production under COVID-19 guidelines, production of scripted series, with their larger crews and complex set requirements, has proven much more challenging.

In this year’s report, FilmLA examines changes in the number and filming locations of: (1) new scripted shows (or “new projects,” including traditional pilots); and (2) live-action scripted series available for viewing. We also look at (3) the estimated number of projects that were shut down or disrupted due to COVID-19. This year’s studied production cycle (the “2020 cycle”) covers the period from June 1, 2019 through May 31, 2020.

1 **NOTE:** This is a phrase that coined by FX Networks CEO, John Landgraf, at an industry event for TV critics in 2015.

2 FilmLA, 2019 Television Report.
https://www.filmla.com/wp-content/uploads/2019/10/2019_TV_Report_WEB.pdf

3 **NOTE:** Quibi announced on October 21, 2020 that they were shutting down effective December 1, 2020.

4 **NOTE:** Due to the fast-changing environment in the post-shutdown production sphere, it should be noted that the majority of this research pertains to information available as of August 24, 2020.

RESEARCH METHODOLOGY

Throughout the year, FilmLA conducts primary and secondary research on new scripted, English-language projects⁵ and ongoing television series. New projects include pilots, pilots that are picked up to series, and straight-to-series orders that have been green-lit and which are scheduled to complete production during the 2020 cycle. Ongoing television series refer to shows that aired during the 2020 cycle.

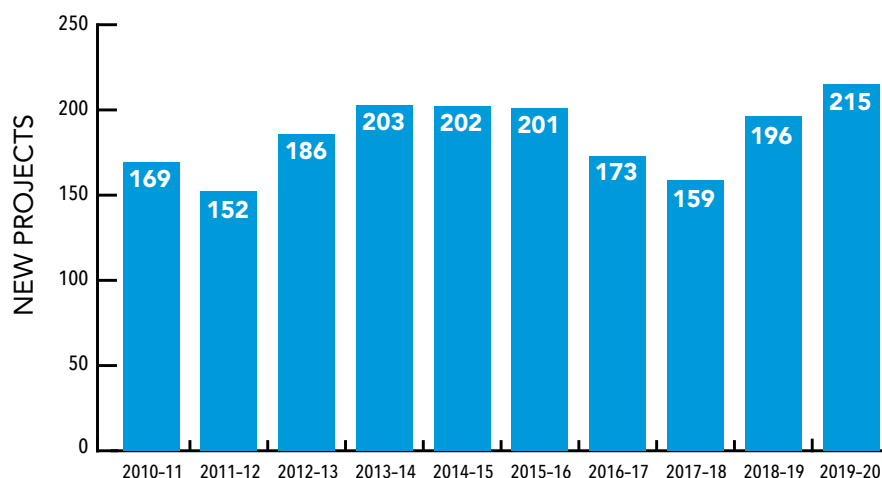
The findings contained in this report are drawn from a myriad of research sources listed in the Appendix. These include subscription databases, online television websites, as well as articles and data that appear in trade journals, newspapers, national and international magazines.

5 **NOTE:** This includes English-language co-productions with U.S.-based companies.

NEW SCRIPTED TELEVISION PROJECTS IN 2020

During the 2020 cycle, FilmLA counted a total of 215 new scripted projects, both dramas and sitcoms, across all three distribution platforms – broadcast, cable and streaming. This count includes 140 one-hour and 75 half-hour projects and also includes limited and mini-series. The count pertains to new projects that were slated to be filmed during the 2020 cycle – many of which were subject to COVID-19 disruptions.

NEW PROJECT COUNT BY PRODUCTION CYCLE



The 215 new projects this cycle represent the highest count since FilmLA began tracking these numbers back in 2011. The total project count increased by 9.7 percent over the previous year (196 projects) and by 27.2 percent since 2011 (169 projects).

Examining new projects by distribution platform year over year, production of new broadcast shows declined by -11.9 percent, from 67 to 59. A total of 32 of these shows were one-hour, and the remaining 27 were half-hour.

On the other hand, the number of new cable shows rose 11.3 percent from 53 to 59. This includes 43 one-hour and 16 half-hour projects.

Meanwhile, new streaming projects, once again, experienced a steep increase, growing 27.6 percent from 76 to 97. This is not surprising, given the launch of four new streaming platforms during this cycle. This streaming series count includes 70 one-hour and 27 half-hour projects.

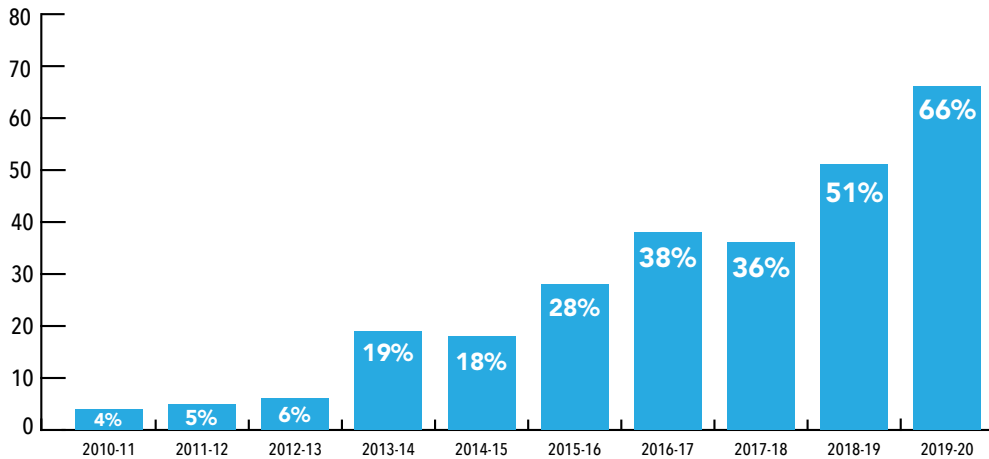
As FilmLA reported last year, in 2019 the numbers of new streaming projects surpassed new broadcast projects for the first time.⁶ It can be assumed that a rising number of new streaming shows is a trend that will continue, barring the failure of or consolidation among existing platforms.

⁶ FilmLA, 2019 Television Report. p. 7.
https://www.filmla.com/wp-content/uploads/2019/10/2019_TV_Report_WEB.pdf

NEW PROJECTS ORDERED STRAIGHT-TO-SERIES

With the emergence of more streaming platforms, the straight-to-series ("STS") model of content production is poised to become even more dominant. This year, a total of 66 percent of new projects fell into this category, compared to a mere 4 percent in 2011, 36 percent in 2018, and 51 percent in 2019.

SHARE OF NEW PROJECTS ORDERED STRAIGHT-TO-SERIES



The STS model is in greater use among newer distribution platforms. Among all new projects planned for this year, 15.3 percent of broadcast television projects were STS orders, cable consisted of 76.3 percent, and streaming had the highest number at 89.7 percent.

PHOTO: i am EM / Shutterstock.com

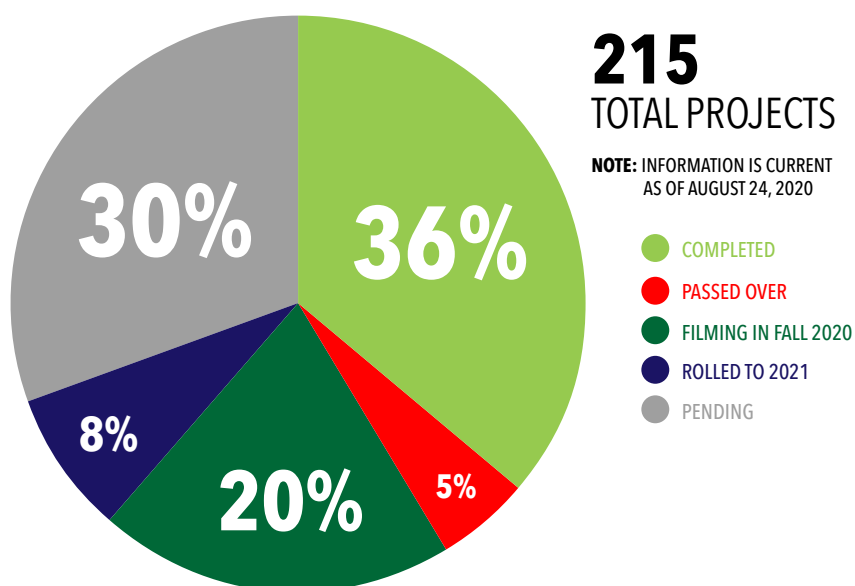


CURRENT STATUS OF NEW PROJECTS

As authors work to assemble this report,⁷ only 36 percent of new projects planned for this cycle had completed production. Another 20 percent are either currently in production or planning to film this fall. As the weeks progress, assuming no further production shutdowns due to COVID-19, it is likely additional disrupted projects will enter production. By comparison, by this time during the 2019 cycle, nearly all 196 new projects had been completed, and 144 were just awaiting an air date.

The 38 percent of new projects that have yet to resume are either still pending (30 percent) or have been rolled to a second cycle in 2021 (8 percent). A total of 5 percent have been canceled outright. Given the current logjam that the pandemic has created, it is possible that some of the 65 pending projects (30 percent of the total) might also be canceled or moved to the 2021 season. The final status of these pending projects will be unknown until the 2021 production cycle. If they do not return to production, much of the economic value they represent will be lost.

⁷ **NOTE:** Due to the fast-changing environment of project status in the COVID-era, the majority of the research contained in this report runs through the week of August 24, 2020 and is therefore subject to change upon final publication.



Tracking filming locations for new shows each year is important since it provides insight into location trends. With some notable exceptions, once a scripted television drama or sitcom has been filmed in a given jurisdiction, the filming location seldom changes in subsequent seasons. This is in contrast to unscripted, reality shows such as *Survivor*, whose smaller crews, shorter shooting schedules, and location-driven storylines allow for filming jurisdictions to change each season. It is also dissimilar to feature films, especially high-budget fare, where productions often shoot in multiple locations. With television projects, unless A-list talent demands that a project be filmed in a certain location or productions can receive a more favorable tax credit, such as the California Film Commission's Film & TV Tax Credit program (which provides a 25 percent credit for relocating television series), most projects film recurring seasons in the same jurisdiction.

Assuming these new projects will all be completed and will not relocate to avoid COVID-19 disruption, FilmLA has broken down the filming locations across all three platform types—broadcast, **cable** and **streaming**.

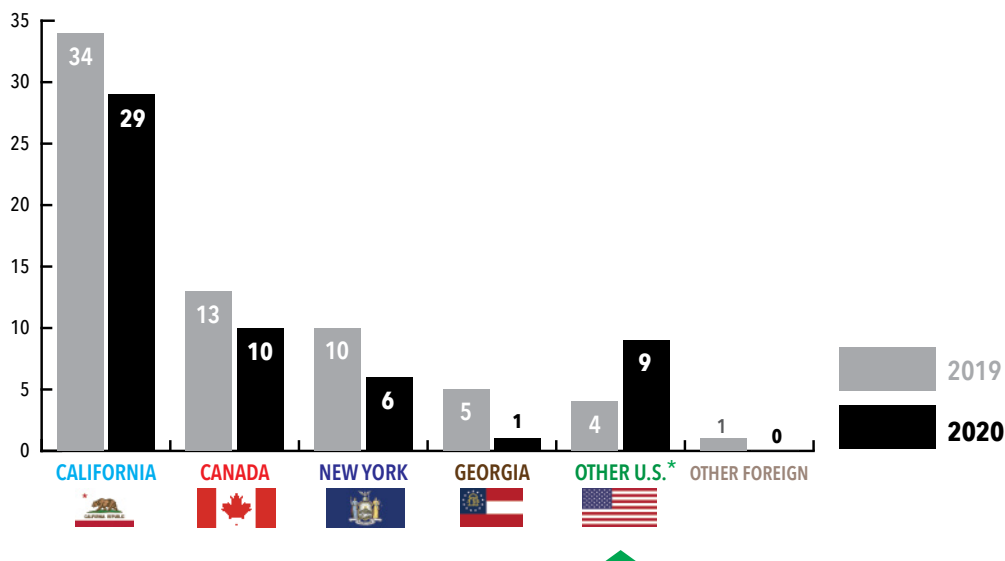
BROADCAST NETWORK TELEVISION LOCATIONS

Looking at the locations of new broadcast projects, which includes 59 shows (32 one-hour / 27 one-half hour) regardless of their completion status, California/Los Angeles is again the top location for 2020.⁸ The Golden State accounts for nearly one-half (49.2 percent) of filming locations for new broadcast shows (29 total). As the historic home to sitcoms, a total of 25 of the 29 new broadcast projects—86 percent of the total—consisted of comedies.

California was followed in a distant second place by Canada with 10 projects, New York with 6 projects, and Other U.S. states with at least one project each (9 total).⁹

TOP LOCATIONS FOR NEW NETWORK PROJECTS

2019 VERSUS 2020



*Other U.S. states—the third highest category this year—represented the highest percentage change (125 percent) from a total of four in 2019 to nine this year. These states include Illinois (2 new projects), North Carolina (2), New Jersey (2), New Mexico (2) and Texas (1).

Among the nine projects that were filmed in these states, the only one that features the filming location in the storyline is The CW's *Walker*—a straight-to-series order—where a widowed father returns to Austin, Texas. Therefore, the reason for the jump in U.S. states from fifth to third place this year is in part due to a combination of competitive tax incentives, legislation, sound stages and other production infrastructure.¹⁰

Last year, California (34 projects), Canada (13) and New York (10) were the top three locations for new broadcast shows. Georgia ranked in fourth place in 2019 with 5 projects, ahead of Other U.S. states (4 projects). This means, that with the exception of other U.S. states, all jurisdictions hosted fewer broadcast shows this year.

⁸ FilmLA, 2019 Television Study, p. 5.
https://www.filmla.com/wp-content/uploads/2019/10/2019_TV_Report_WEB.pdf

⁹ NOTE: The filming locations for four new broadcast shows could not be verified.

¹⁰ For a list of state and international tax credits, please refer to the following AFCI report.
<https://www.o-spi.co.uk/wp-content/uploads/2019/06/Olsberg-SPI-Global-Incentives-White-Paper-Final-2019-06-04.pdf>

CABLE TELEVISION LOCATIONS

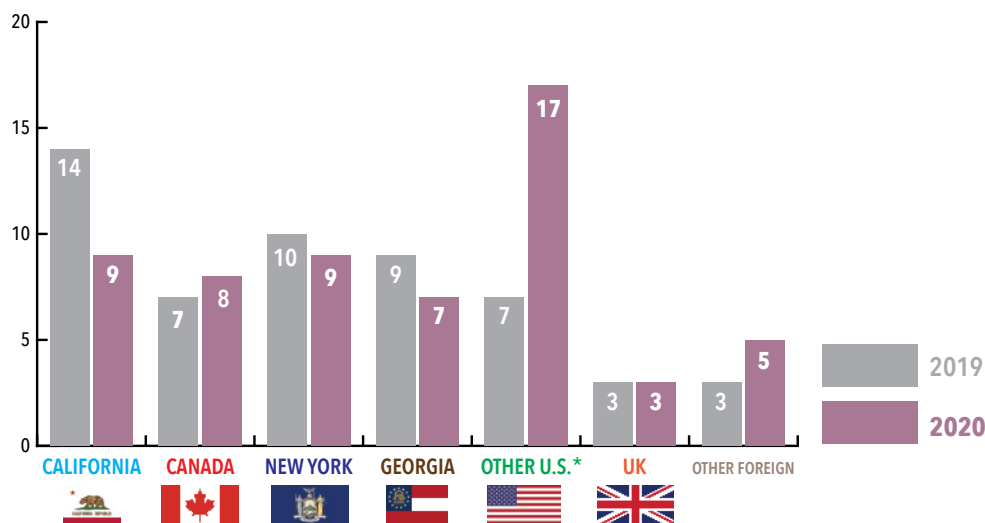
This year, FilmLA counted a total 59 total new cable projects. In another surprising reversal, Other U.S. states, in aggregate, (17 new projects) outranked California (9 projects) as the number one location. In 2019, California was the number one destination with 14 new cable projects, followed by New York (10) and Georgia (9) and Canada (8) and Georgia (7).¹¹

This means that California (-36 percent), New York (-10 percent) and Georgia (-22 percent) hosted fewer cable projects, while Other U.S. states (+143 percent), Other Foreign (+67 percent) and Canada (+14 percent) hosted more new cable projects in this cycle.

¹¹ NOTE: The location of one new cable project could not be verified.

TOP LOCATIONS FOR NEW CABLE PROJECTS

2019 VERSUS 2020



*Other U.S. states and their number of new shows in 2020 include—Louisiana (3 new shows), Pennsylvania (3), Illinois (2), Virginia (2), Florida (1), Maryland (1), Massachusetts (1), New Jersey (1), New Mexico (1), Oregon (1), and Texas (1).

Each of the states offer competitive tax credits, a limited supply of available stage infrastructure, and lower cost inputs such as cheaper labor, supplies and visitor-serving infrastructure.

In contrast to new network shows, where the location was not regularly featured in the storyline, FilmLA found that 10 of the 17 new cable projects (59 percent) filmed in locations that were specific to their story. For example, *Rust* (Showtime) is set in a Rust Belt town in Pennsylvania, and *61st Street* (AMC) deals with the Chicago criminal justice system.¹² In three instances, A-list talent or writers made the decision to film in that location, meaning that the location decisions for the four remaining new cable shows could not be verified.

The Other Foreign jurisdictions category for new projects—the number six category (5 projects)—includes Croatia, France, Hungary, Mexico and South Africa. Only two of the new projects incorporated their foreign location into the storyline.

In summary, it is clear that when it comes to shooting locations for cable shows, California is not only competing with rival production centers, but with smaller production centers in other U.S. states and countries as well. This is in contrast to new broadcast projects, where the Golden State remains the undisputed leader, especially for the production of TV sitcoms.

¹² NOTE: This is based on storyline information from IMDbPro.

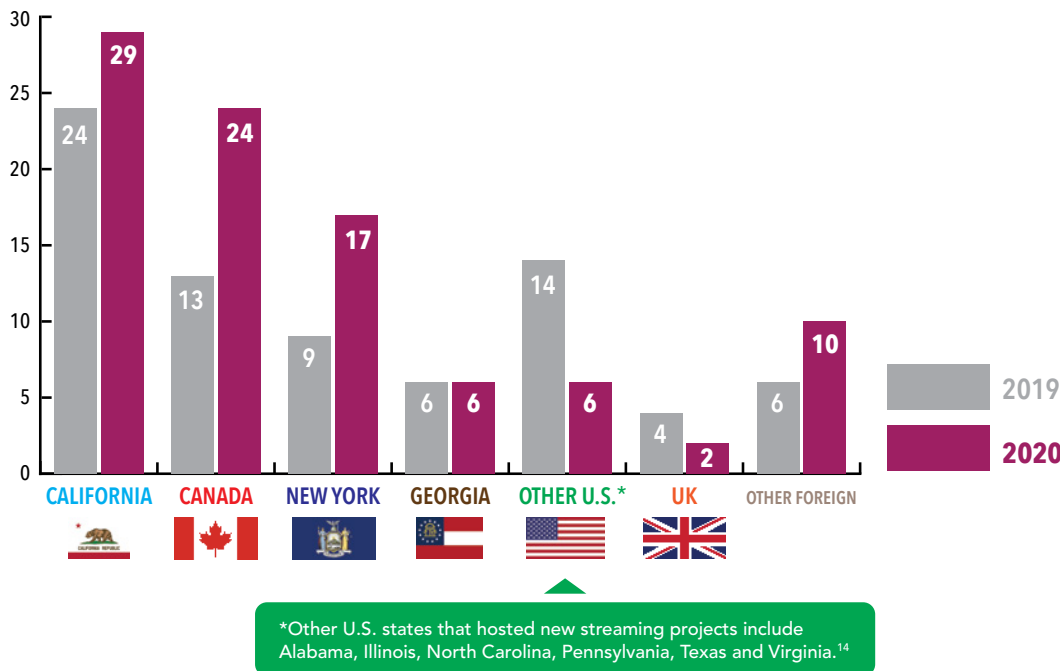
STREAMING PLATFORM LOCATIONS

In 2019, new streaming platform projects increased from 41 to 76, representing an 85 percent jump in one year. That was also the year were streaming projects surpassed broadcast and cable for the first time.

The trend continues this year with 97 new projects, albeit with a smaller increase of 27.6 percent over 2019 (76 projects).

TOP LOCATIONS FOR NEW STREAMING PROJECTS

2019 VERSUS 2020



California still leads as the number one filming location among streaming companies this year with 29 projects, comprising 29.9 percent of new projects. However, California's share of this work was higher last year at 31.5 percent of new projects.

In second place this year was Canada (24), followed by New York (17) and Other Foreign (10).¹³ Both Georgia and Other U.S. states tied for fifth place with 6 new projects, respectively.

Breaking down the number of Canadian productions by province, British Columbia/Vancouver had the largest number (16 new projects), followed by Ontario/Toronto (7 projects), and one project in Alberta/Calgary (24 total). This means that British Columbia/Vancouver is the filming location for nearly as many new streaming projects (16) as New York (17). Projects in Canada increased by 85 percent between this year and last.

In contrast to broadcast and cable projects where the number of Other States rose in rank, the opposite was true for new streaming projects. In this cycle, Other U.S. states (excluding Georgia), fell from 14 projects in 2019 to six.¹⁵ Conversely, the Other Foreign category with 10 new projects increased from six to ten in 2020—an increase of 67 percent. Other Foreign jurisdictions where new streaming projects were filmed this cycle, which tied with Georgia for fifth place last year, came in fourth position this year. These countries include New Zealand (3 projects), Australia, Czech Republic, Germany, Hungary, India, Japan, and Spain.

As discussed in greater detail in FilmLA's 2019 Television Study,¹⁶ some of the major streaming companies like Netflix® have established production hubs outside of California in places like British Columbia, New Mexico, New York, Ontario, and the U.K. As this segment of television continues to grow and outpace broadcast and cable television, California will continue to face strong competition.

¹³ NOTE: Other foreign locations include New Zealand (3 projects), Australia, Czech Republic, Germany, Japan, India, Hungary and Spain.

¹⁴ NOTE: The filming locations of three projects could not be verified.

¹⁵ NOTE: This includes 11 projects in Other U.S. states, plus three in New Mexico, which were listed separately in the 2019 study.

¹⁶ FilmLA, 2019 Television Study, p. 12.

https://www.filmla.com/wp-content/uploads/2019/10/2019_TV_Report_WEB.pdf

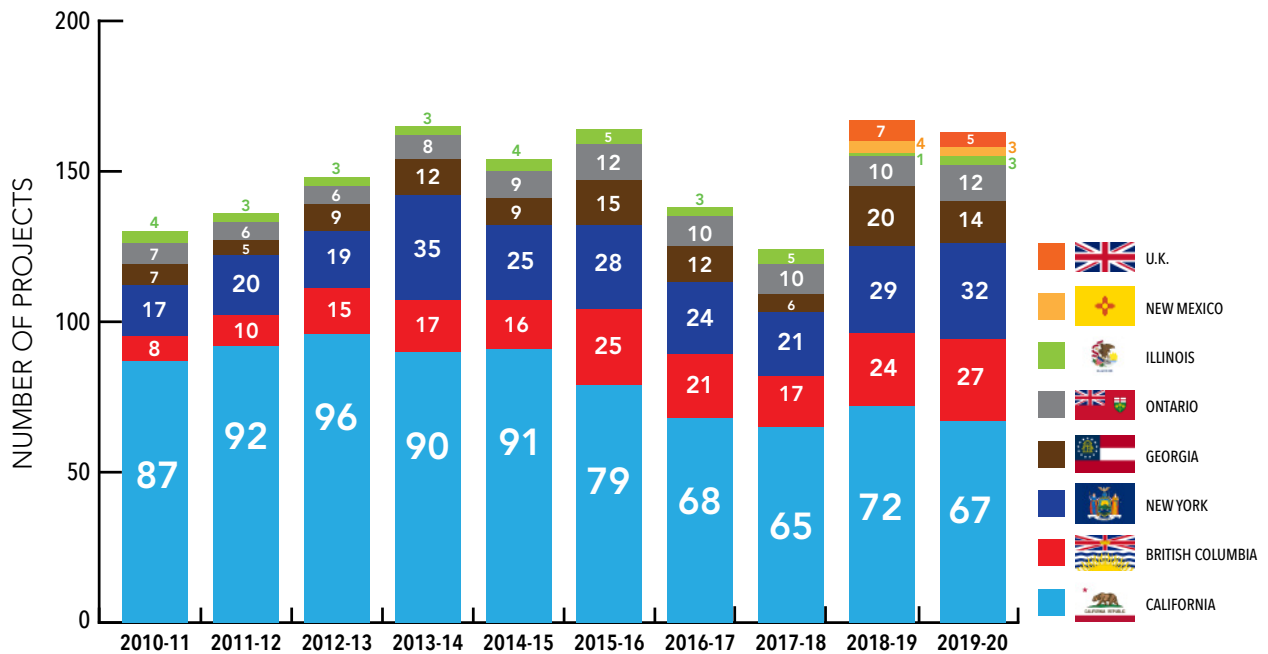
TOP PROJECT LOCATIONS FOR ALL NEW PROJECTS

Looking at the top locations, as a whole, for all new projects—broadcast, cable and streaming, the surprise story among filming locations for the 215 new projects this year is the rise of Other U.S. states and Other Foreign jurisdictions. In 2019, U.S. states accounted for 22 total projects among the three platforms compared to 32 this year—an increase of 45 percent. Other Foreign jurisdictions increased by an even greater amount from 10 to 15 (50 percent). Canada and New York also experienced year-over-year increases of +27 percent and +10 percent, respectively. Total new projects in Georgia and the U.K. declined by -30 and -29 percent, respectively.

Though California remained the leading filming location on all three platforms with 67 new projects, this number is down by -7 percent from the 72 projects in the Golden State in 2019. It is also down from 96 projects in 2013.

Aggregating the locations data for all 215 new projects this year (146 one-hour/69 half-hour), the top 10 locations accounted for 80 percent of the total. California was once again the leader this year with a market share of 31.2 percent, compared to a higher 36.7 percent in 2019. New York was second with 32 projects (versus 29 in 2019), followed by British Columbia (27 versus 24), Georgia (14 versus 20), Ontario (12 versus 10) and the U.K. (5 versus 7).

TOP TELEVISION PROJECT LOCATIONS, BY PROJECT COUNT



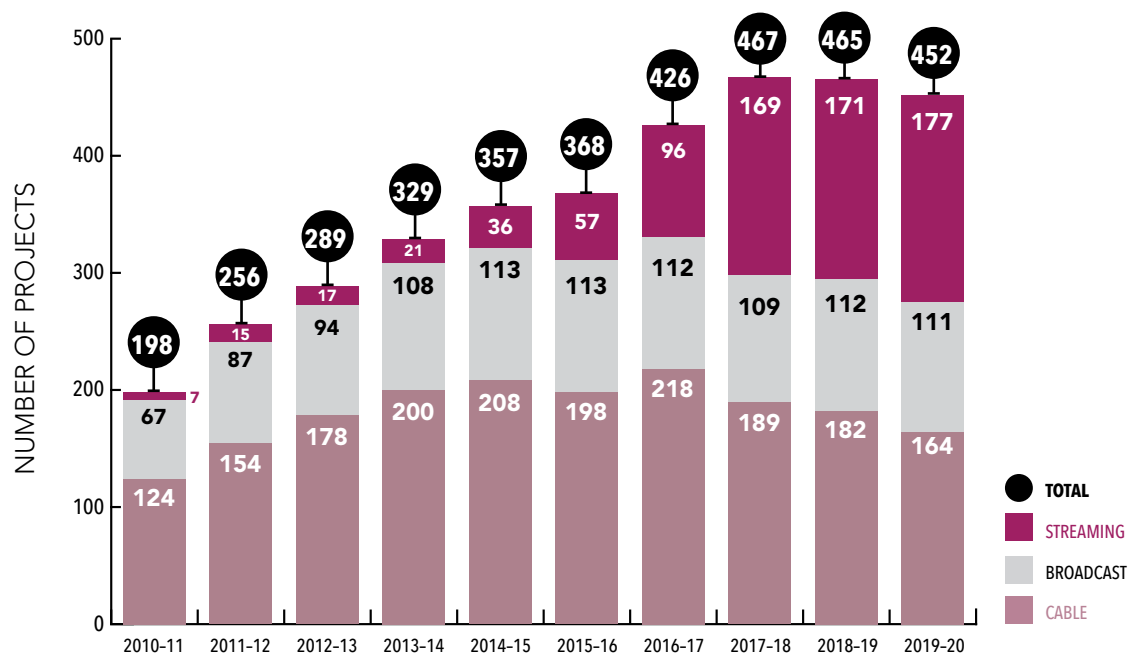
The order of these top five jurisdictions remain unchanged from last year, though Ontario, British Columbia and New York experienced increases, while California, Georgia and the U.K. experienced declines in the number of new shows since the last cycle. Vying for sixth place this cycle with three shows each are the states of Illinois, Louisiana, New Mexico, North Carolina and Pennsylvania. Last year only the states of Illinois (1 new project) and New Mexico (4) cracked the top ten locations for new projects.

LIVE-ACTION SCRIPTED TELEVISION PROJECTS THAT AIRED IN 2020

Based on FilmLA's count for TV shows that aired during the 2020 cycle, a total of 452 scripted series were available for viewing across all three television platforms. This is down slightly (-2.8 percent) from 465 reported last year, and 467 in 2018.

According to FilmLA's count, the 452 scripted series that aired this year include 111 broadcast shows, 164 cable shows, and 177 digital shows. With the exception of cable shows, which declined from 182 to 164 this year (-9.9 percent), the number of broadcast and streaming shows remained relatively unchanged from 2019, with streaming projects that aired increasing by a mere 3.5 percent.

NUMBER OF LIVE-ACTION SCRIPTED SERIES PRODUCED BY U.S. STUDIOS: 2019-20



One reason for the decline in the number of shows for viewing this year can be tied to the pandemic. COVID-19 effectively shut down global production in mid-March, leaving many shows unable to start or complete their scheduled episodes for the season. Many of the broadcast networks had already started filming their ongoing television series and airing their episodes prior to the shutdown, though they were unable to complete the entire seasons. Some of these episodes may air later this year or be incorporated into the next season (when production can resume), depending on the show. In other instances, some shows have been completed, and networks may have chosen to move their shows to the 2021 season and fill in the remainder of 2020 with unscripted or acquired shows. For streaming series released on platforms such as Netflix, a season worth of episodes is typically released all at once. Unable to finish their seasons, some of these series orders never aired.

At the time of preparing this report, many scripted shows that were originally planning to shoot over the summer and air in the fall, are currently in production and scheduled to air in November or January (2021 cycle). This means that this year the fall television season, which historically begins in September, has been moved to November.

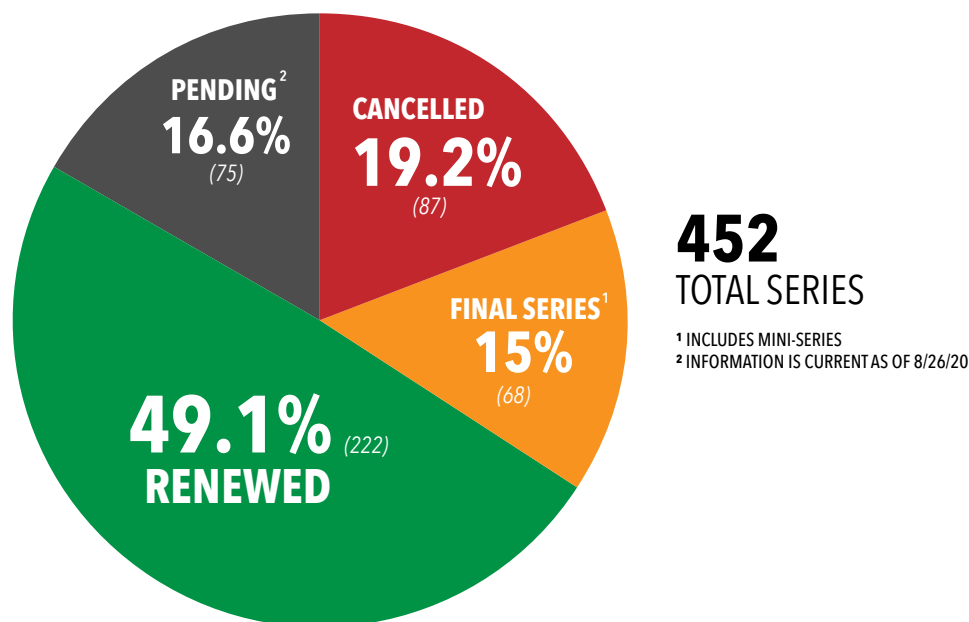
RENEWAL STATUS OF LIVE ACTION SCRIPTED SERIES

Looking at the renewal status of the 452 shows in the 2020 cycle, nearly one-half of them (49.1 percent) have been renewed for an additional season, 19.2 percent were canceled, 16.6 percent await a decision, and 15 percent have ended their series (series finale).

FilmLA will continue to track the status of scripted series that air in the 2021 cycle to see if any longer-term trends, such as a higher percentage of cancellations, emerge. It is quite possible that studios might either cancel shows or move scripted series to their streaming sister companies. During the pandemic, streaming platforms have definitely benefited from quarantine-induced viewership. *The New York Times* reported that the number of American households with at least one streaming subscription jumped by 2.5 million, to 74 percent, in the first quarter of 2020.¹⁷

¹⁷ John Koblin, "Lockdown TV: Netflix Dominates, News Surges and Bea Arthur is Still Golden," *The New York Times*, April 30, 2020. <https://www.nytimes.com/2020/04/30/business/media/coronavirus-television-netflix-ratings.html>

LIVE-ACTION SCRIPTED SERIES BY RENEWAL / CANCELLATION STATUS: 2019-20

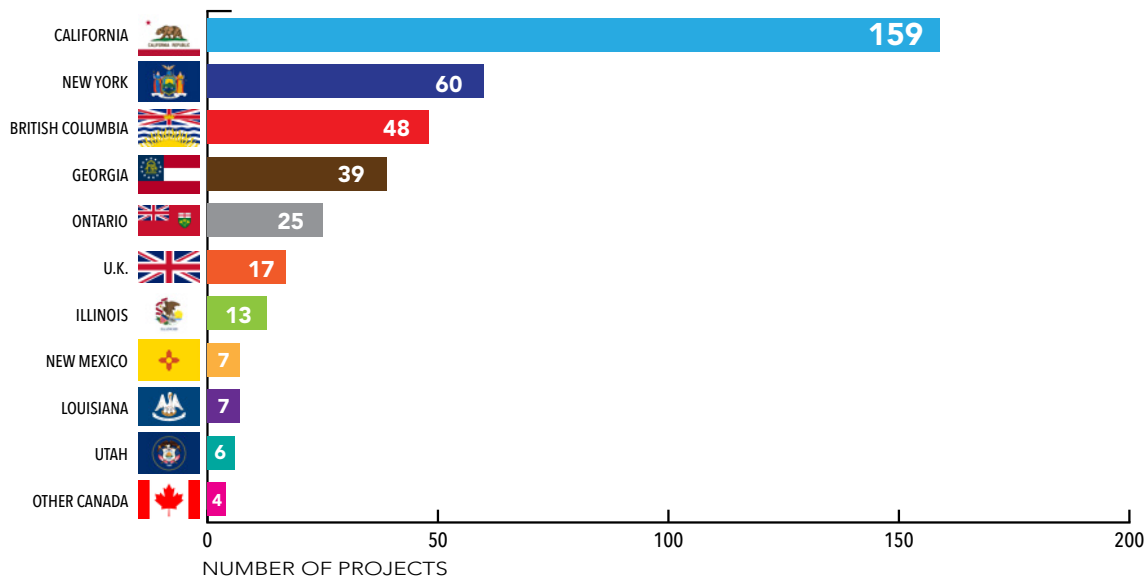


TOP TEN FILMING LOCATIONS FOR LIVE-ACTION SCRIPTED SERIES

Taken together, the top ten filming locations captured for 85.1 percent of all series that aired this year. A total of 159 series were shot in California, followed by New York (60), British Columbia (48), Georgia (39), Ontario (25), The U.K. (17), Illinois (13). Rounding out the eighth place position was a tie between New Mexico and Louisiana (7 series each), followed by Utah (6) and other Canadian provinces (4).

Los Angeles/California is once again the undisputed leader as the top production location for scripted series (70 one-hour / 89 half-hour). The ranking of the top five locations in 2020—California, New York, British Columbia, Georgia and Ontario—did not change between this year and last. However, the number of series filmed in Los Angeles/California declined by -19.6 percent (from 198 in 2019), while the numbers for New York (60) and Illinois (13) remained the same in both years.

LIVE-ACTION SCRIPTED SERIES BY FILMING LOCATION: 2019-20



The major production centers that experienced increases this year include the U.K. (+112.5 percent), Ontario (+66.7 percent), British Columbia (+29.7 percent) and Georgia (+18.2 percent). As discussed in FilmLA's recent Sound Stage study, both the U.K. and Ontario have made significant additions to their supply of available stage infrastructure recently in hopes of attracting more U.S. series.¹⁸ Each of those four jurisdictions also offer uncapped film incentives, making them attractive to producers looking not only for financial incentives, but also the certainty that government funding will not run out.

¹⁸ FilmLA, Sound Stage Production Report (2018).
https://www.filmla.com/wp-content/uploads/2020/06/Sound_stage_report_v1-WEB.pdf



THE IMPACT OF COVID-19 ON SCRIPTED TELEVISION PRODUCTION

The impact of COVID-19 on all aspects of film and television production is unprecedented. A recent report endorsed by the Association of Film Commissioners International (“AFCI”) estimated that COVID-19 generated a 70 percent average decline in total production over the first six months of 2020 compared to 2019.¹⁹ This percentage is based on a survey data from 141 national, regional and local film commissions in 69 countries.

In Los Angeles County, FilmLA’s Second Quarter 2020 (“Q2”) statistics (April-June) further demonstrate the devastating impact on production activity levels. When California Governor Gavin Newsom lifted filming restrictions on June 15th, FilmLA began issuing permits for the last two weeks of the quarter (June 15-30). No permitted filming had occurred county-wide over a three-month period between mid-March and mid-June. As a result, second quarter 2020 shoot days for television dramas declined by an astounding 99 percent over the same period last year, and sitcoms experienced a 100 percent decline.²⁰

The production decline in Q2 is significant not only in terms of sheer numbers of productions, but also for local employment. As one of Los Angeles County’s premiere industries, the film industry employs over 160,000 people, though the exact number of film industry workers who are out of work as a result of the pandemic is unknown.²¹

-
- 19 Oldsberg SPI, “Global Screen Production: The Impact of Film and Television Production on Economic Recovery from COVID-19,” June 25, 2020, p. 34.
<https://www.o-spi.co.uk/wp-content/uploads/2020/06/Global-Screen-Production-and-COVID-19-Economic-Recovery-Final-2020-06-25.pdf>
- 20 FilmLA, Q2 2020 Report, p. 2.
https://www.filmla.com/wp-content/uploads/2020/07/2020_Q2_Local_production_days.pdf
- 21 Los Angeles County Economic Development Corporation (LAEDC).
<https://laedc.org/industries/entertainment/>

ESTIMATED IMPACT ON NUMBER OF PRODUCTIONS

Between mid-March and the end of May, FilmLA estimates that 198 television projects were either shut down by COVID-19 in March or unable to start production in the months of April and May. This includes 57 pilots and 141 series. FilmLA derived these estimates based on a combination of canceled/suspended titles appearing in trade journals for the month of March, in conjunction with databases and production lists of projects that were scheduled to commence principal photography in April and May (see Sources).

It should be noted that all 57 pilots were unable to complete production between the March shutdown through the end of May. The status of each of the individual 141 series impacted, however, varies from project to project. Many of the series—both new and ongoing projects—had already started airing episodes. This is especially true for broadcast shows, many of which began airing episodes but were unable to fully complete all scheduled their entire season. If this is the case, they would have been included in the 452 series available for viewing.

Research from Ampere Analysis reported that producers of high-end scripted content²² will face COVID related delays for far longer than their unscripted counterparts. Producers of such scripted content—which typically spends an average of 11 months in production—will be battling against delays well into 2021. This is in contrast to unscripted content, which spends an average of two months in production.²³

-
- 22 **NOTE:** An example would be Netflix’s *The Witcher*, which relies on heavy special effects.
- 23 “High end scripted content to face production delays for at least 12 months,” September 17, 2020.
<https://www.rapidtvnews.com/2020091759062/high-end-scripted-content-to-face-production-delays-for-at-least-12-months.html>

IMPACT ON PRODUCTION PLATFORMS

Broadcast television was the hardest hit sector during the shutdown, accounting for 95 projects—47.9 percent of the total. Streaming projects—63 total - took the second hardest hit at 31.8 percent. Cable projects were the least impacted at 20.2 percent of the total (40 projects).

COVID-19 decimated the traditional broadcast pilot season this year, which typically runs from late February to early May. According to a recent article in *The Los Angeles Times*, the annual pilot season injects an estimated \$500 million in annual spending into the entertainment economy.²⁴

There were 58 broadcast pilots scheduled to be filmed this season. Only one pilot—a CBS Chuck Lorre comedy titled, *B Positive*—was able to fully complete production during the cycle before the shutdown. At the time of preparing this report, several pilots and series orders have since been completed.

Networks have been discussing for some time the idea of breaking out of the traditional pilot model and season. Prior to the shutdown, the networks started veering toward the streaming model with more straight-to-series orders and a year-round “second cycle” pilot production schedule. The global pandemic may accelerate those plans and entice networks to film projects throughout the year versus within a concentrated season. Therefore, COVID-19 has not only slowed the number of projects that were able to be completed this year, but it will likely modify the business model for studios moving forward.

IMPACT ON LOCATIONS

The estimated 198 television projects shut down during the subject period were either filming or scheduled to be filmed in 206 locations.²⁵ Hardest hit was California, accounting for 73 total projects. All of these impacted projects were either filming or scheduled to film in Los Angeles County. Productions were fairly evenly split between new projects (35 total) and ongoing series (36 total). The remaining two projects—one new project and one an ongoing series—were canceled.

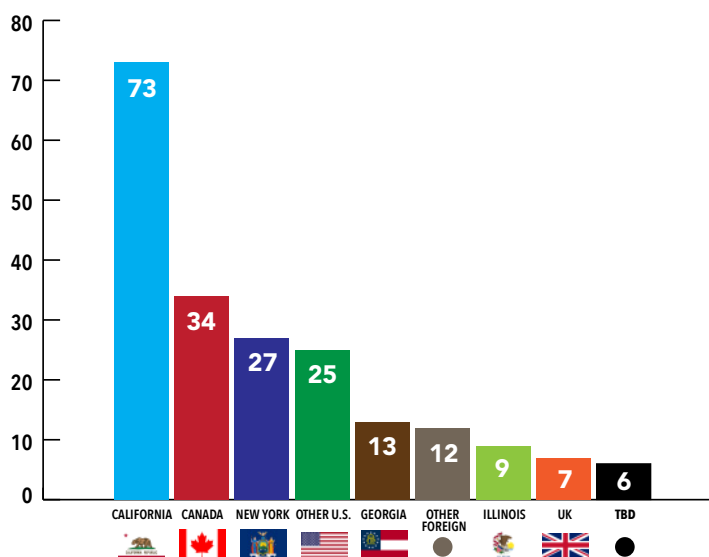
Among the 35 new projects that were shut down in the Golden State, the vast majority were comedies (23 total), which accounted for roughly two-thirds (65.6 percent). However, among the ongoing series shut down due to COVID-19, the proportion was evenly split between comedies (18) and dramas (18).

California's total of impacted projects is double the entire country of Canada with 34. Among the Canadian provinces, British Columbia accounted for 21 (62 percent) of the total, followed by Ontario with eight (24 percent), and five other Canadian jurisdictions. New York and Other U.S. came in third and fourth place with 27 and 25 impacted projects, respectively.

The 25 Other U.S. locations with projects that were shut down, aside from Georgia (13 projects) and Illinois (9), include Louisiana (3), Massachusetts (3), New Mexico (3), Virginia (3), D.C. (2), New Jersey (2), North Carolina (2), Texas (2), Florida (1), Oklahoma (1), Pennsylvania (1), South Carolina (1) and Utah (1).

The 12 foreign locations, excluding the UK with 7 shuttered projects, include New Zealand (3), Czech Republic (2), France (2), Australia (1), Hungary (1), Italy (1), Japan (1) and South Africa (1).

FILMING LOCATIONS FOR PROJECTS SHUT-DOWN MID-MARCH TO MAY 31ST, 2020



Combined, the 37 Other U.S. states and Other Foreign locations illustrate how production this year has spread away from the traditional production centers. Their total exceeds Canada (34 projects).

²⁴ Meg James, “TV Pilots, a big employer in L.A., are in limbo. How the coronavirus could change the industry,” *The Los Angeles Times*, March 29, 2020. <https://www.latimes.com/entertainment-arts/business/story/2020-03-29/television-pilot-season-coronavirus-fallout-los-angeles-filming>

²⁵ **NOTE:** Several projects were scheduled to be shot in two or more locations.

SUMMARY AND IMPACT ON 2021 PRODUCTION CYCLE

When productions first shut down in March, speculation was that filming would resume in May. As COVID cases increased, a return to production was then estimated for July; then July turned into September/October. Many projects have since resumed filming, both locally and globally.

But the impact of COVID extends well beyond the near six-month production hiatus. The pandemic has impacted the entire production pipeline of projects that were scheduled to shoot this summer and fall. Based on weekly production lists from the Film & Television Industry Alliance, which tracks all major feature film and television projects in pre-production and active development, an average of eight U.S.-based television projects begin filming each week.²⁶ At an average of 32 per month, this means that roughly 100 additional television series between June and September would have commenced shooting, under normal circumstances.

During the pandemic, the short-term solution for broadcast series has been to fill in programming schedules with more reality TV, one-off TV specials, occasional reruns and the acquisition of foreign, English-language series. For example, NBC[®] premiered the Canadian medical drama, *Transplant*, which it acquired in May, to temporarily replace its original series, *New Amsterdam*.²⁷ The CW[®] has also aired foreign series, including *Transplant* (Canada), *Devils* (Italy) and *Coroner* (Canada). Some networks are also borrowing shows from their other divisions. For example, CBS[®] will be airing old episodes of *Star Trek: Discovery*, which first appeared on its All Access streaming service.

But even prior to the impact of the pandemic, *The Hollywood Reporter* reported back in February that streaming platforms were becoming the priority for dramas and comedies, with traditional networks relying increasingly on more cost-effective unscripted series to fill out schedules.²⁸ Reasons include, but are not limited to, the higher cost of scripted series, and parent companies focusing more resources on their burgeoning streaming businesses.

Recent corporate reorganizations during the pandemic have only accelerated plans to move certain networks out of scripted programming altogether. For example, NBCUniversal's E![®] and Bravo[®] channels, were both home to scripted shows but are now focused almost exclusively on unscripted fare. Likewise, WarnerMedia's TBS[®], TNT[®] and truTV[®] all currently have scripted content, but their lineups have been dramatically pared down.²⁹

In summary, the Peak TV curve of scripted shows appears to be flattening and is likely to be accelerated by the pandemic. Based on current trends, TV dramas may slowly shift away from traditional broadcast and cable networks to streaming platforms. California remains the top location for global television production, but its market share has declined since last year's study. Further, the Golden State was the hardest hit production center by the pandemic this year.

26 Film & Television Industry Alliance: The Production List.
<https://productionlist.com/>

27 Nellie Andreeva, "NBC Sets September Debut For Canadian Medical Drama 'Transplant' As Pandemic Impacts Fall Schedule Plans," *Deadline*, August 12, 2020.
<https://deadline.com/2020/08/transplant-nbc-sets-premiere-date-canadian-medical-drama-covid-pandemic-impact-fall-schedule-plans-1203011550/>

28 Michael O'Connell, "Why Scripted TV Shows are Becoming Scarce on Basic Cable," *The Hollywood Reporter*, February 27, 2020.
<https://www.hollywoodreporter.com/news/why-scripted-tv-shows-are-becoming-scarce-basic-cable-1281036>

29 Joe Otterson, "As Coronavirus Pandemic Continues, Television Development Struggles to Pick Up the Pace," *Variety*, September 9, 2020.
<https://variety.com/2020/tv/features/coronavirus-pandemic-television-development-slows-1234762307/>



APPENDIX

THE CALIFORNIA FILM & TV TAX CREDIT PROGRAM

The California Film & TV Tax Credit program has been instrumental in attracting and retaining television projects. Since its inception in 2009, the tax credit has been modified. Under the original program (Program 1.0), only basic cable series and/or series for any distribution outlet that relocated to California were eligible for the incentive.

When Program 2.0, which began in 2014, extended the tax credit to all one-hour shows, regardless of the distribution platform. Under the program, new and recurring TV shows and pilots may be eligible to receive a non-transferable 20 percent tax credit, provided they have minimum budgets of \$1 million per episode. This amount increases to 25 percent for relocating television projects. Television series (of any episode length) that have filmed the last season (of at least 6 episodes) outside of California are eligible for the credit upon relocating production to California. To qualify, the series must have a \$1 million minimum budget per episode.

The new Program 3.0 allocated another \$330 million per fiscal year through 2025. The state's production tax credit program requires recipients to begin production within 180 days (or 240 days for larger productions).³⁰

To date, the tax credit has successfully attracted a total of 20 relocated TV projects. This includes five projects from New York, four from British Columbia, two from Louisiana, two from Texas, and one project each from the Czech Republic, Florida, Georgia, Ireland, Maryland, New Jersey and North Carolina.

At the end of last year, the California Film Commission announced that Universal Television's *Dream* would relocate to California from New Jersey, and Horizon Scripted Television's *Special* would move here from Texas—both for their second seasons. Under Program 3.0, the fourth season of HBO's *In Treatment* (New York) and the third season of the TBS series, *Miracle Workers* (Czech Republic), announced they would film in the Golden State.

Together, these 20 projects have generated nearly 1,700 shoot days, approximately 3,400 crew, nearly 3,400 cast members, 69,000 background/extra man days and estimated qualified spending of approximately \$718 million. It should be noted that these figures exclude recurring seasons of these shows. For example, *American Horror Story* relocated for Season 5 and spent an additional 5 seasons (seasons 6-10) shooting in Los Angeles. In fact, the 20 relocating series generated 17 additional seasons of these shows that shot in California. Therefore, the impact on shoot days, cast & crew, and qualified spend represents an additional estimated \$750 million in qualified spend.

30 NOTE: Due to the recent COVID-19 pandemic, the tax credit program allowed recipients to apply for force majeure.



RELOCATING TV SERIES RECEIVING THE CALIFORNIA FILM & TELEVISION TAX CREDIT

TITLE - SEASON OF RELOCATION	FISCAL YEAR	RELOCATED FROM	CA FILMING DAYS	CREW	CAST	BACKGROUND	TOTAL QUALIFIED SPEND
<i>American Crime</i> (ABC) - Season 3	2016-2017	Texas	63	127	164	1,436	\$20,043,000
<i>American Horror Story</i> - Season 5*	2015-2016	Louisiana	114	152	290	3,940	\$42,466,000
<i>Ballers</i> - Season 3*	2016-2017	Florida	65	189	157	2,224	\$31,864,000
<i>Dream</i> - Season 2	2019-2020	New Jersey	64	325	37	3,056	\$43,614,000
<i>Good Girls</i> - Season 2*	2018-2019	Georgia	104	182	154	3,464	\$38,027,000
<i>In Treatment</i> - Season 4	2020-2021	New York	48	125	8	126	\$20,264,000
<i>Legion</i> - Season 2*	2016-2017	British Columbia	103	121	224	3,516	\$50,374,000
<i>Lucifer</i> - Season 3*	2016-2017	British Columbia	192	166	379	9,383	\$67,344,000
<i>Miracle Workers</i> - Season 3	2020-2021	Czech Republic	45	200	37	135	\$20,050,000
<i>Mistresses</i> - Season 4	2015-2016	British Columbia	85	185	136	2,842	\$21,894,000
<i>Penny Dreadful: City of Angels</i>	2018-2019	Ireland	137	150	352	10,230	\$99,830,000
<i>Scream Queens</i> - Season 2	2015-2016	Louisiana	100	207	141	2,570	\$36,147,000
<i>Secrets and Lies</i> - Season 2	2015-2016	North Carolina	82	188	131	2,384	\$23,331,000
<i>Sneaky Pete</i> - Season 3	2017-2018	New York	86	172	190	1,803	\$38,315,000
<i>Special</i> - Season 2	2019-2020	Texas	40	106	24	416	\$6,336,000
<i>The Affair</i> - Season 4*	2016-2017	New York	79	132	217	3,135	\$29,936,000
<i>The OA</i> - Season 2	2016-2017	New York	71	158	138	6,790	\$34,018,000
<i>Timeless</i> - Season 2*	2017-2018	British Columbia	83	138	302	4,967	\$34,724,000
<i>Veep</i> - Season 5*	2015-2016	Maryland	55	180	239	4,382	\$29,185,000
<i>You</i> - Season 2*	2018-2019	New York	86	156	103	2,526	\$30,120,000
TOTAL			1,702	3,359	3,423	69,325	\$717,882,000

* NOTE: Asterisk (*) indicates multiple seasons were shot after the year of relocation. These 20 relocating shows generated an additional 17 seasons as follows: *American Horror Story* (+5 seasons); *Ballers* (+2 seasons); *Good Girls* (+1 season); *Legion* (+1 season); *Lucifer* (+3.5 seasons); *The Affair* (+1 season); *Timeless* (+.5 season); *Veep* (+2 seasons); and *You* (+1 season).

Source: data obtained from the California Film Commission

All told, Programs 2.0 and 3.0 have aided more than 150 television projects to date, generating more than \$5 billion in estimated qualified spending.



PHOTO: Penny Dreadful: City of Angels / Showtime

ABOUT THIS REPORT

For more than a decade, FILMLA, 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:

- Ampere Analysis
- Deadline
- Film & Television Industry Alliance (FTIA): The Production List (weekly)
- Olsberg SPI: Global Film Production Incentives, June 19, 2019
- Olsberg SPI: Global Screen Production - The Impact of Film and Television Production on Economic Recovery from COVID-19, June 25, 2020
- The Hollywood Reporter
- The Wrap
- TV Dates Watch
- TVOnline.com
- TV Line
- TV Series Finale
- Variety
- What's New on Netflix



6255 W. Sunset Blvd.
12th Floor
Hollywood, CA 90028

FilmLA.com