



2021

TELEVISION
REPORT



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Below: Perry Mason Season 1 / Photograph by Merrick Morton/HBO



INTRODUCTION

IN THE SECOND QUARTER OF 2020, the global COVID-19 pandemic brought scripted television production (along with production of other forms of filmed entertainment) to a halt. FilmLA estimated that approximately 198 U.S.-produced, English-language television series were either shut down or unable to commence production between mid-March and mid-June that year¹. Production slowly returned last summer (2020) and was then hit with another slowdown due to a second COVID surge in late fourth quarter 2020/early first quarter 2021.

The arrival of additional streaming services this past year like HBO Max, Peacock and Paramount+ was expected to push the number of original series in production to new highs. Instead, the pandemic forced dramas and other scripted TV shows to postpone shooting. As a result of production delays, many series that would have aired in the last 1.5 years are either still in production or nearing completion. Nearly every television viewer is awaiting the next season of one of their favorite series.

One decade ago, FilmLA began tracking the number of television series available for viewing across broadcast, cable and (later) streaming platforms. This year, FilmLA researched the filming locations of the English-language, scripted television shows of U.S. origin that were available for viewing between June 1, 2020 and May 31, 2021 (the “2021 cycle”). This 2021 report covers the number of television series that aired and breaks them down by filming locations for the three types of distribution platforms – broadcast, cable and streaming.

¹FilmLA, *2020 Television Report*, p. 13.
https://www.filmLA.com/wp-content/uploads/2021/01/2020_TV_Report_WEB_v1.pdf

THE VOLUME & GROWTH OF TELEVISION SERIES

BY TYPE OF PRODUCTION

The following table illustrates the growth of the three television platforms – broadcast, cable and streaming – over a ten-year period.

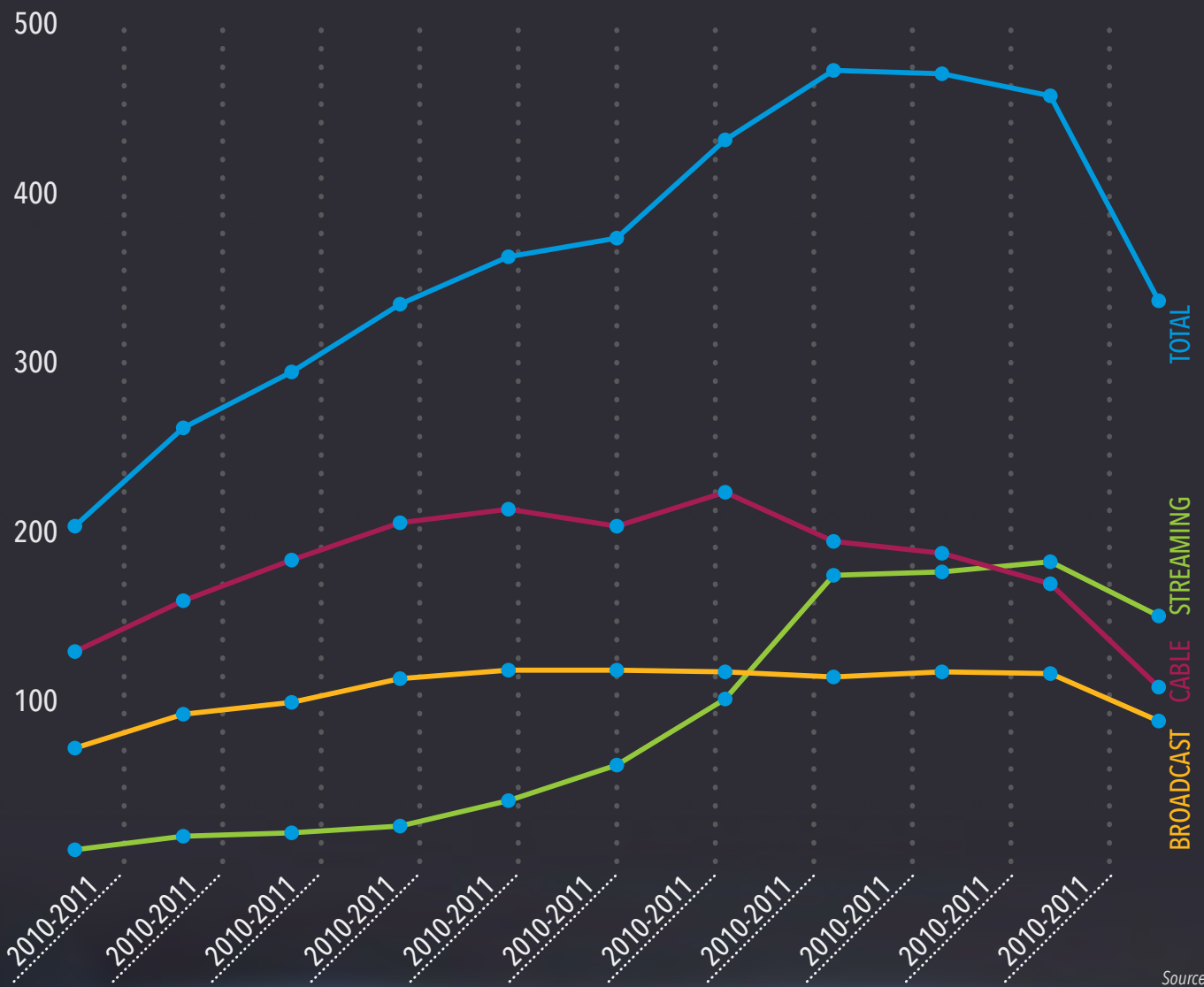
YEAR	BROADCAST	CABLE	STREAMING	TOTAL
2010-11	67	124	7	198
2011-12	87	154	15	256
2012-13	94	178	17	289
2013-14	108	200	21	329
2014-15	113	208	36	357
2015-16	113	198	57	368
2016-17	112	218	96	426
2017-18	109	189	169	467
2018-19	112	182	171	465
2019-20	111	164	177	452
2020-21	83	103	145	331
CAGR 2011-21	2.2%	-1.8%	35.4%	5.3%

Source: FilmLA

In 2011, a total of 198 series were released, mostly broadcast and cable shows. This number grew to 452 by 2020 – an increase of 128 percent. Growth has been primarily driven by the advent of TV streaming services, which grew their original series count by more than 2400 percent from a mere seven series in 2011 to 177 by 2020. Overall, the average number of series aired on streaming platforms grew at an average annual rate of 35.4 percent, compared to just 2.2 percent for broadcast series. Production of cable shows declined at an annual rate of -1.8 percent.

**BETWEEN 2011 & 2021,
THE NUMBER OF SCRIPTED
STREAMING SERIES
INCREASED AT AN AVERAGE
ANNUAL RATE OF 35.4%**

Because of the COVID shutdown and sporadic production restarts, the number of series available for viewing in the 2021 cycle – a total of 331 – declined by -26.8 percent for a numeric difference of 121 fewer series. Some series slated for production were un-renewed because of COVID-related impacts, shorting inventories further down the line.

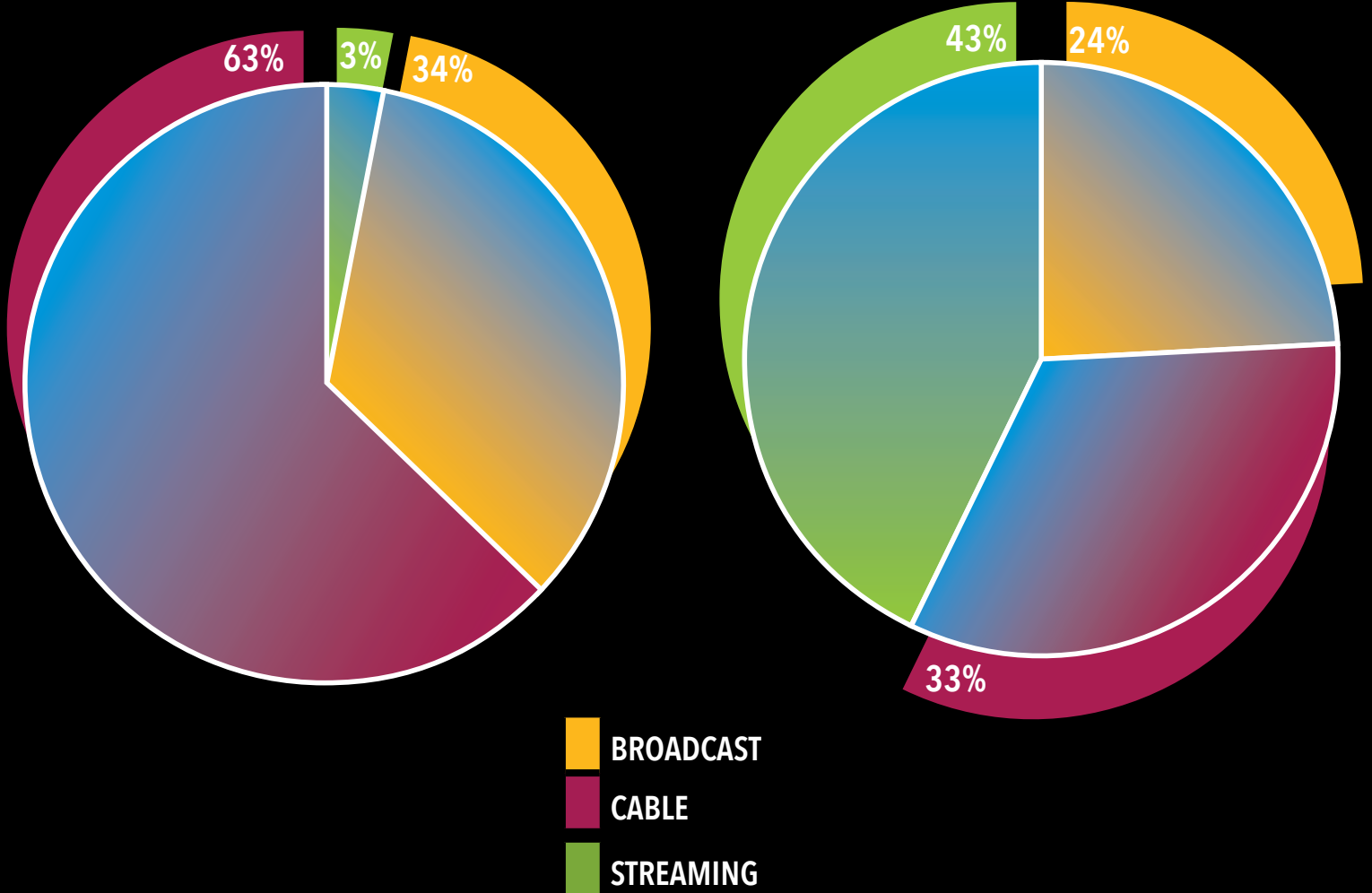


Source: FilmLA



SERIES BY DISTRIBUTION PLATFORM 2010-2011

SERIES BY DISTRIBUTION PLATFORM 2020-2021



Source: FilmLA

DUE TO COVID-RELATED PRODUCTION DELAYS, THE TOTAL NUMBER OF SCRIPTED SERIES AVAILABLE FOR VIEWING DECLINED BY -26.8%

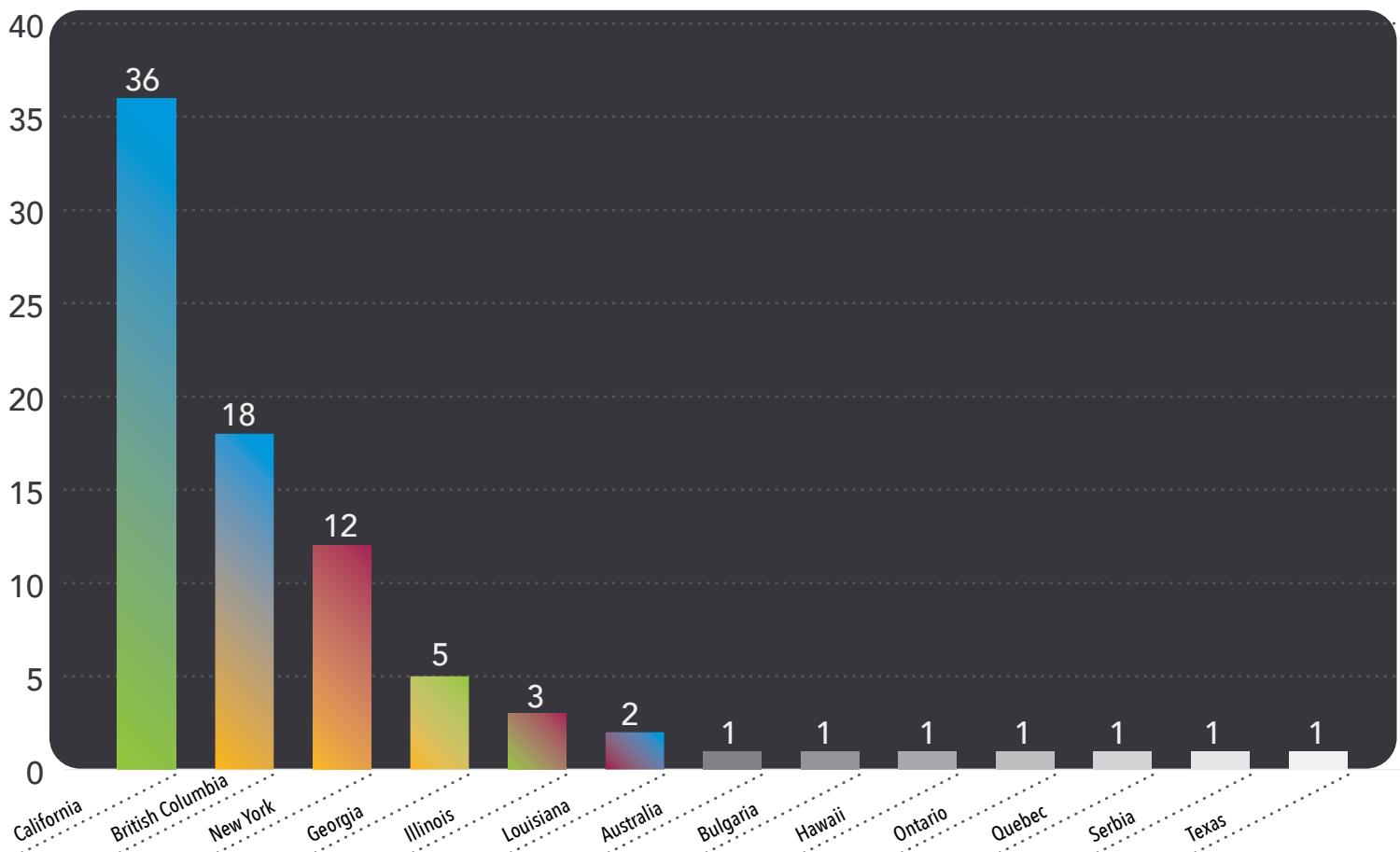
Looking at the proportion of series by platform over the past ten years, broadcast shows declined from 34 percent of available series in 2011 to 24 percent in 2021. Cable series count experienced an even greater decline from 63 to 33 percent. On the contrary, series on streaming platforms comprised a mere 3 percent in 2011, growing to 43 percent in ten years. In terms of sheer numbers, streaming services now dominate the television industry. In this cycle, streaming series comprised 43 percent of the total, followed by cable at 33 percent and broadcast at 24.

FILMING JURISDICTIONS FOR SERIES

BY DISTRIBUTION PLATFORM

FilmLA also reviewed the filming locations for series production across each of the three distribution platforms. The definition of a “location” consists of all jurisdictions where filming occurred, which is defined by either a state (in the case of a U.S. series shot in the United States), a province (in the case of series shot in Canada) or a country (in the case of series shot outside North America). For instance, if a series shot in Los Angeles and Vancouver, the state of California and the province of British Columbia would both be counted. Therefore, in this analysis, FilmLA’s location and series counts are different figures and will not sum.

FILMING JURISDICTIONS FOR BROADCAST SERIES



Source: FilmLA and IMDbPro

A total of 83 series aired on broadcast networks in the 2021 cycle. This includes 58 one-hour and 25 half-hour shows. The average number of episodes per series was 15.

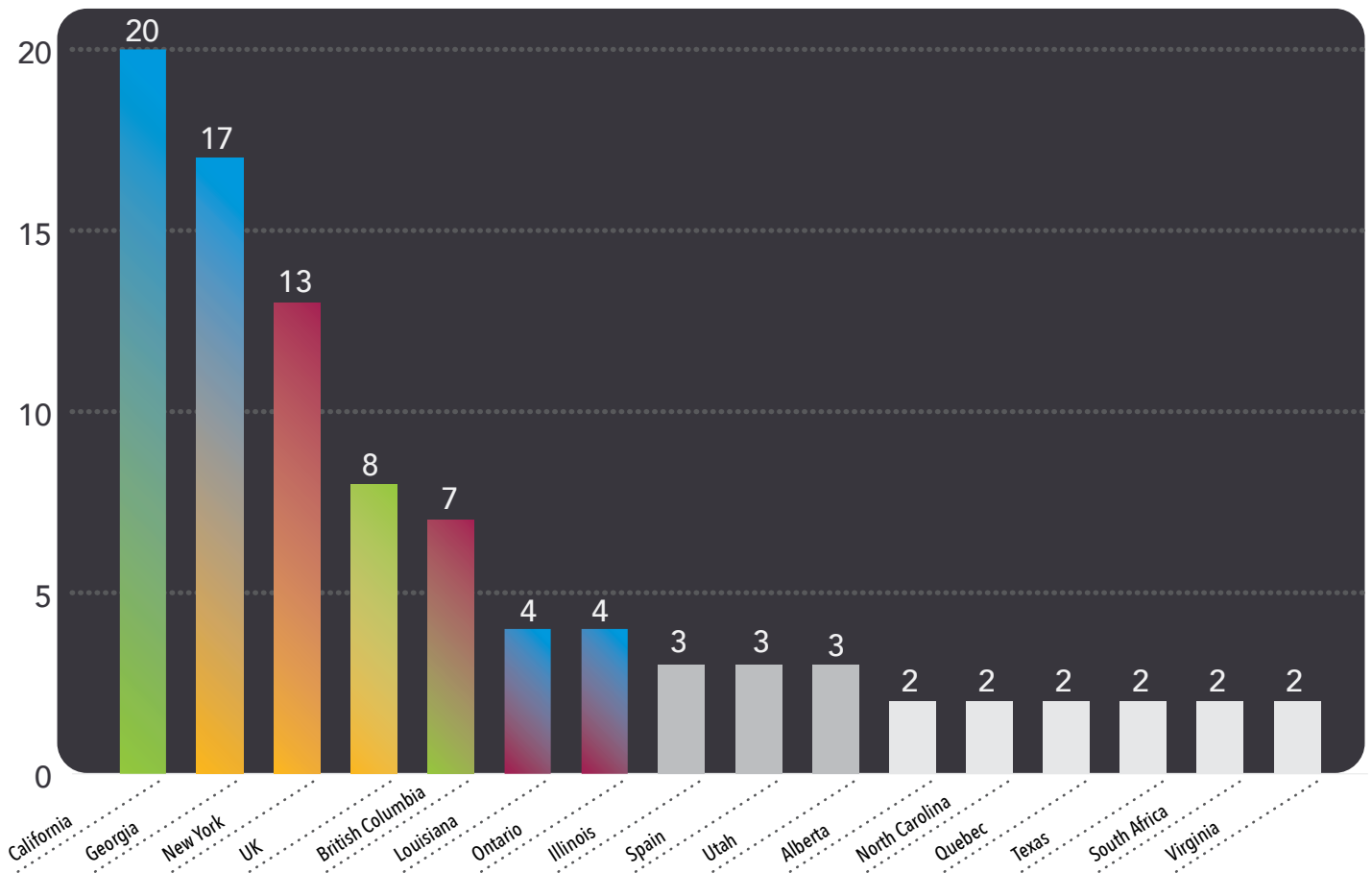
California was the top filming jurisdiction with a total 36 shows - or 43.4 percent of all broadcast series - in 2021. In second place was British Columbia, which is a popular filming destination for networks like The CW. The province hosted 18 shows or 21.7 percent of broadcast series.

New York was the third most favored filming jurisdiction for broadcast shows, hosting 12 (14.5 percent) in 2021. Combined, these top three destinations hosted 79.5 percent of the total series. In fourth place was Georgia with 5 shows. Both Illinois and Louisiana hosted three and two shows, respectively. The states of Hawaii and Texas each hosted one series, as did the countries of Australia, Bulgaria and Serbia, and the Canadian provinces of Ontario and Quebec.

FILMING JURISDICTIONS FOR CABLE SERIES

A review of filming jurisdictions for cable series shows a much broader number and dispersion of jurisdictions. In 2021, FilmLA counted 103 series, which were shot across 106 jurisdictions. This includes 69 one-hour and 34 half-hour programs. The average number of episodes per series was lower than broadcast at 11.

California edged out Georgia for top jurisdiction, with a total of 20 series, representing 18.9 percent of cable series jurisdictions, compared to Georgia's 16 percent (17 series). In third place was New York with 13 series (12.3 percent). The third place finisher was the UK with 8 shows, followed by British Columbia (7 shows total).



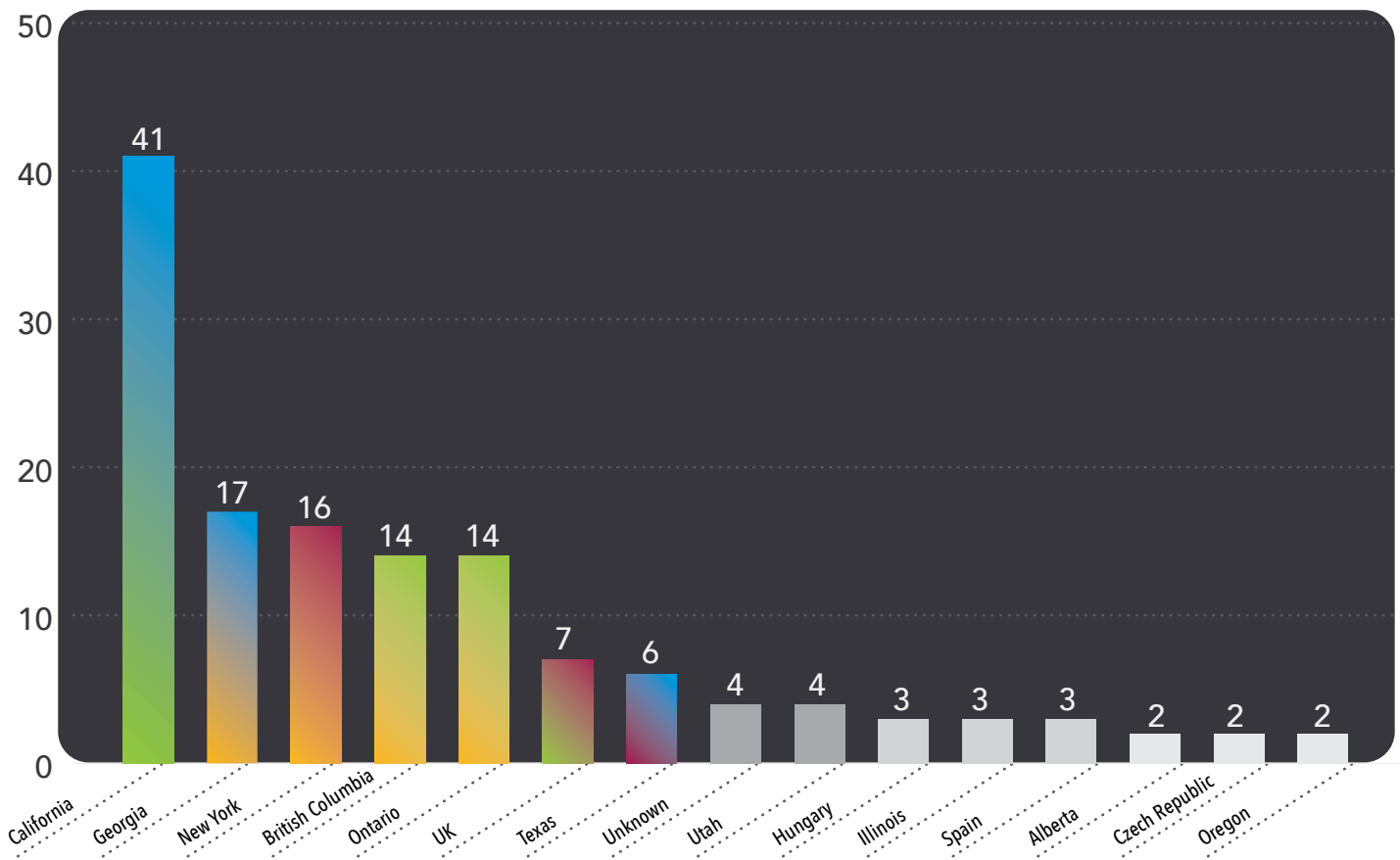
Source: FilmLA and IMDbPro

Rounding out the remainder of the jurisdictions were Louisiana and Ontario with four shows each, Illinois, Spain and Utah with three, and Alberta, North Carolina, Quebec, Texas, South Africa and Virginia with two. The five states of Colorado, Florida, Massachusetts, Pennsylvania and Rhode Island each hosted one series, in addition to the six countries France, Hungary, Italy, Mexico, New Zealand and Slovakia. FilmLA was unable to obtain filming information for one series, bringing total jurisdictions to count to 106.



FILMING JURISDICTIONS FOR STREAMING SERIES

In this cycle, FilmLA counted a total of 145 streaming series that filmed in 153 jurisdictions. Series consisted of 82 one-hour and 63 half-hour shows, with an average of 12 episodes per series. Once again, California emerged as the leading location with a total of 41 shows, which represents 26.8 percent of all streaming show jurisdictions.



Source: FilmLA and IMDbPro

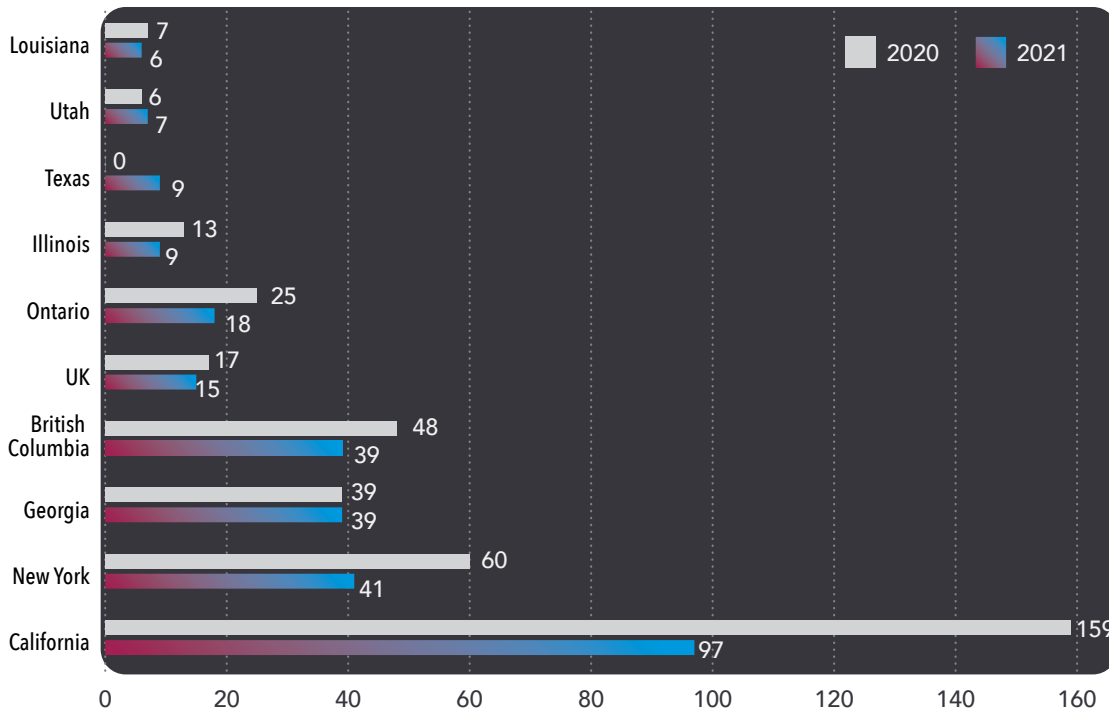
Following California was Georgia (17 series), New York (16 series), and British Columbia and Ontario with 14 series each.

Rounding out the cast were the UK (7 series), Texas (6) and Utah (4). Both Hungary, Spain and Illinois hosted 3 shows, and Alberta, the Czech Republic and Oregon had 2 each. Four states (not pictured) – Colorado, Louisiana, North Carolina and Pennsylvania hosted one show, and 11 countries – Bulgaria, Denmark, France, Israel, Mexico, Morocco, New Zealand, Nova Scotia, Poland, Slovakia and South Africa – also hosted one series. FilmLA was unable to obtain filming locations for four of the projects.

TOP TEN LOCATIONS ACROSS ALL DISTRIBUTION PLATFORMS

Each year, FilmLA aggregates the top ten filming destinations for all series available for viewing each year. As noted, this year the number of series available for viewing declined by nearly -27 percent or 121 series. Perhaps unsurprisingly, the three North American production centers hosting the greatest number of television projects in 2020 also suffered the steepest drop in 2021 output. It is beyond the scope of this analysis to determine why the same trend could not be observed in smaller production centers.

TOP TEN LOCATIONS FOR TV SERIES - JUNE 2020-MAY 2021



Source: FilmLA

Among the top three filming destinations, California experienced the steepest year-over-year decline of -39 percent, going from 159 to 97 series. New York was second, declining from 60 to 41 series (-31.7 percent). British Columbia and the UK experienced more modest declines of -18.8 and -11.8 percent, respectively.

Surprisingly, the number of series shot in Georgia remained steady at 39.

Georgia is one of the production centers that had an earlier return to production during COVID. The pandemic shut down production in Georgia for two months last spring, compared to three months for Los Angeles and most other jurisdictions.

JURISDICTION	2020	2021	% CHG.
California	159	97	-39.0%
New York	60	41	-31.7%
Georgia	39	39	0.0%
British Columbia	48	39	-18.8%
UK	17	15	-11.8%
Ontario	25	18	-28.0%
Illinois	13	9	-30.8%
Texas	0	9	-
Utah	6	7	16.7%
Louisiana	7	6	-14.3%

BETWEEN 2020 & 2021, CALIFORNIA, AS A FILMING DESTINATION, EXPERIENCED THE GREATEST PERCENTAGE LOSS OF SCRIPTED SERIES (-39%)

Source: FilmLA

CALIFORNIA TAX CREDIT

The California Film & TV Tax Credit Program was enacted in 2009. The program has been modified several times. The latest program — Program 3.0 — allocated another \$330 million per fiscal year through 2025.

According to the California Film Commission, which administers the program, to date the combined programs 1.0, 2.0 and 3.0 have approved a total 591 projects, hired 161,000 cast and crew, and generated \$19.4 billion in expenditures. As of October 25, 2021, a total of \$2.4 billion in tax credits have been allocated under the programs.

The tax credit program provides eligible, new and recurring TV series and pilots a non-transferable 20 percent tax credit, provided they have minimum budgets of \$1.0 million per episode, increasing to 25 percent for relocating television projects. To date, California has attracted 29 television series that have relocated from other jurisdictions. Television series that have filmed at least six episodes of the last season outside California are eligible upon relocation, provided they have a minimum budget per episode of \$1 million.



TO DATE, CALIFORNIA FILM & TV TAX CREDIT PROGRAM HAS ATTRACTED 29 SERIES THAT HAVE RELOCATED TO THE GOLDEN STATE.

RECENT EXPANSION OF THE TAX CREDIT

In mid-July 2021, an expansion of the tax credit bill - Senate Bill 144 (SB 144) - passed both houses of the Legislature. SB 144 expands the tax credit allocation available under the Film and Television Tax Credit 3.0, establishes a new credit for qualified motion pictures produced on a certified studio construction project, and increases the credit percentage when specified diversity goals are met.

The tax credit breakdown falls into two categories: a \$180 million increase to the current tax incentive program and \$150 million for a new incentive tied to the construction of sound stages. The \$330 million in annual funding remains intact with the following changes:

- \$30 million for relocating television series - \$15 million annually for fiscal years 2022 and 2023.
- \$150 million for recurring television series - \$75 million annually for fiscal years 2022 and 2023.
- \$150 million for qualified entities shooting on certified a sound stage

For the first time, filmmakers and television producers will be required to meet workforce diversity targets, approved by the California Film Commission, in order to be eligible for the credits.



Perry Mason Season 1 / Photograph by Merrick Morton/HBO

THE CALIFORNIA FILM & TV TAX CREDIT PROGRAM WAS EXPANDED IN JULY 2021

Beginning January 1, 2022, and before January 1, 2032, SB 144 also establishes a new credit in an amount equal to 20 percent or 25 percent for qualified expenditures for the production of a qualified motion picture in a certified studio construction project. A total of \$150 million is allocated for this new

credit. To receive the credit, a taxpayer would be required to construct or renovate one or more sound stages certified by the California Film Commission.

For more information and frequently asked questions on SB 144, please visit the California Film Commission's website: <https://cdn.film.ca.gov/wp-content/uploads/2021/08/SB-144-Stage-Construction-Tax-Credit-FAQs.pdf>

TAX CREDITS ALLOCATED TO SERIES IN 2021 CYCLE

The California Film & TV Tax Credit program in the 2021 cycle covered 13 series, accounting for 13.4 percent of series filmed in California and generating an estimated \$693 million in expenditures. Since many series were delayed this year, the number of series and expenditures would have been considerably higher in the absence of the pandemic. Nevertheless, the employment impact of those 13 series that aired in 2021 generated approximately 3,009 cast hires, 2,367 crew, and 58,824 extras.

THE CALIFORNIA FILM & TV TAX CREDIT PROGRAM IN THE 2021 CYCLE COVERED 13 SERIES, ACCOUNTING FOR 13.4% OF SERIES FILMED IN CALIFORNIA & GENERATING AN ESTIMATED \$693 M IN EXPENDITURES.

PLATFORM	NAME	FISCAL YEAR	PROGRAM	CA FILMING DAYS		CAST HIRED	CREW HIRED	EXTRAS	QUALIFIED EXPENDITURES	CREDITS
BROADCAST	Good Girls 4	2020-21	3.0	140	BROADCAST	8	250	4298	\$59,360,000	\$11,895,000
	S.W.A.T. 4	2019-20	2.0	176		704	220	8822	\$69,204,000	\$13,972,000
	The Rookie 3	2019-20	2.0	161		227	230	6954	\$78,488,000	\$15,739,000
	This is Us 5	2019-20	2.0	114		350	210	5000	\$68,121,000	\$13,641,000
	SUBTOTAL			591		1289	910	25074	\$275,173,000	\$55,247,000
CABLE	Good Trouble 3	2019-20	2.0	135	CABLE	594	167	3168	\$45,827,000	\$9,176,000
	In Treatment 4	2020-21	3.0	48		8	125	126	\$20,264,000	\$5,066,000
	Mayans MC 3	2019-20	2.0	82		250	200	3200	\$35,466,000	\$7,139,000
	Perry Mason 1	2019-20	2.0	100		361	325	5445	\$74,272,000	\$15,094,000
	Snowfall 4	2019-20	2.0	80		85	125	2050	\$40,496,000	\$8,115,000
	SUBTOTAL			445		1298	942	13989	\$216,325,000	\$44,590,000
STREAMING	Lucifer 5	2019-20	2.0	80	STREAMING	159	117	5875	\$124,656,000	\$8,715,000
	Lucifer 5.5	2019-20	2.0	48		159	117	3525	\$21,822,000	\$4,404,000
	13 Reasons Why 4	2018-19	2.0	110		80	175	9945	\$48,593,000	\$11,790,000
	Special 2	2019-20	2.0	40		24	106	416	\$6,336,000	\$1,584,000
	SUBTOTAL			278		422	515	19761	\$201,407,000	\$26,493,000
TOTAL				1314		3009	2367	58824	\$692,905,000	\$126,330,000

Source: California Film Commission and FilmLA

CONCLUSION

THE SLOWDOWN THAT COVID CREATED in television production chain continues to be felt after one and half years into the pandemic. However, as FilmLA reported in the second quarter (“Q2”) of 2021, television production in Los Angeles has risen again to pre-pandemic levels. Shoot days for TV Dramas in Q2 (totaling 1,501), for example, were up by 120.7 percent over their five-year quarterly average². This signals that production is returning, but the production pipeline logjam remains for the time being.

Due to the changing nature of both television and feature film distribution, FilmLA will be shifting to an all-inclusive Scripted Content study in 2022, covering television series, television movies and feature films. This combined report will be issued once per calendar year moving forward.

²FilmLA.
https://www.filmla.com/wp-content/uploads/2021/08/2021_Q2_Production_Report.pdf



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ABOUT FILMLA RESEARCH

Integral to the work of FILMLA., INC® is ongoing research into the benefits that local filming brings to the Los Angeles region. To that end, we maintain an internal research division devoted to the production, collection and dissemination of information regarding the U.S. film production economy and global production trends.

Provided you cite FilmLA as your source, you are welcome to use all information, charts, graphs, etc. that appear in our reports.

Have a question about this sound stage report or other film industry studies? Please direct inquiries and opportunities to Anne Wurts, Senior Research Analyst at 213.977.8636 or awurts@filmla.com



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