

25-year change in the location of film and television production for selected US studios

Prepared for the International Alliance of Theatrical Stage Employees (IATSE), the Directors Guild of America (DGA), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), the International Brotherhood of Teamsters (IBT), the Laborers International Union of North America (LIUNA!), the Writers Guild of America West (WGAW), and the Writers Guild of America East (WGAE)

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Executive summary

Over the last 25 years, an increasing share of US film and television production has moved to foreign locations, reshaping an industry that supports more than 2 million US jobs.¹ This shift has unfolded alongside sweeping technological, structural, and economic changes across the industry. The rise of streaming platforms shifted television distribution and consumption toward on-demand access, contributing to the decline of traditional cable television and traditional release models. At the same time, film and television production has been reshaped by evolving tax incentive programs across the United States and internationally. Together with major external disruptions, most notably the COVID-19 pandemic and recent industry-wide contraction, these forces have significantly altered production practices.

This analysis tracks that shift by examining where scripted, live-action productions by major US-based studios (“selected US studios”) were primarily filmed, as well as the production budget and number of cast and crew associated with each location.²

Each production is assigned to one of three filming-location categories:

1. **“Primarily in the United States”**: Filmed mostly or entirely in the United States
2. **“Primarily outside the United States”**: Filmed mostly or entirely outside the United States
3. **“Partial US-based filming”**: Significant filming both inside and outside the United States

The analysis includes films with production budgets of at least \$5 million and television episodes meeting minimum budget thresholds of \$1 million for episodes 40 minutes or shorter and \$1.7 million for longer episodes.³ To illustrate the scope of the dataset, in 2024 alone, the most recent full year of data, this captures approximately 100 films representing \$6 billion in production budgets and 1,700 television episodes representing \$7 billion in production budgets.⁴ By focusing on productions by larger studios with budgets above these thresholds, the analysis captures the (i) productions that have the most significant impact on industry employment and economic activity and (ii) projects with sufficient scale to make strategic location decisions between domestic and foreign production locations.

The results section below includes the 25-year change in production location for film and television. **“Significant US-based production”** refers to films and television episodes produced primarily in

¹ For more information on US employment supported by the film and television industry, see Motion Picture Association (2025). The American motion picture and television industry: Creating jobs, trading around the world.

² The 25-year period referenced in this report spans 1999 through 2024. To mitigate annual volatility, the analysis compared the first and last three years of the period (i.e., 1999-2001 and 2022-2024). 2024 was the last full year of data at the time of the analysis. “Selected US studios” are US-based studios (and their US-based affiliates) that produce scripted, live-action content distributed through wide theatrical release, major broadcast or cable networks, or major streaming platforms, with regular productions above the budget thresholds described in the methodology.

³ All budget thresholds are expressed in inflation-adjusted 2025 dollars.

⁴ This analysis covers all films and television episodes fully or partially produced (including co-productions) by the selected US studios, tracking changes in primary filming location over time. No adjustment was made for co-financing arrangements; for example, when a US studio co-financed a production with foreign partners and filmed abroad, the full budget, film/episode count, and number of cast and crew were included in the analysis. While this could overstate the relocation of US studio productions, including these data allows the study to capture the full scale of production activity at each location with US studio involvement. Additionally, depending on the production, co-financing may have displaced expenditure the US studio counterfactually would have otherwise made.

the United States or with partial US-based filming. More detailed results are available in the body of the report.

Primary film production location

- ▶ **The share of production budget by selected US studios for films with significant US-based production declined from 74% to 42% (a 32 percentage-point decrease).** The share of production budget for films produced primarily in the United States declined from 55% to 37%, and the share of production budget for films with partial US-based filming declined from 19% to 5%. The share of production budget for films produced primarily outside the United States increased from 26% to 58%. Had these shares not changed, annual production budget for films with significant US-based production would be approximately \$2 billion higher.
- ▶ **The share of films by selected US studios with significant US-based production declined from 66% to 54% (a 12 percentage-point decrease).** The share of films produced primarily in the United States declined from 52% to 48%, and the share of films with partial US-based filming declined from 14% to 6%. The share of films produced primarily outside the United States increased from 34% to 46%.
- ▶ **Of all cast and crew working on films by selected US studios, the share working on films with significant US-based production declined from 72% to 43% (a 29 percentage-point decrease).**⁵ The share of cast and crew for films produced primarily in the United States declined from 53% to 38%, and the share of cast and crew for films with partial US-based filming declined from 19% to 5%. The share of cast and crew for films produced primarily outside the United States increased from 28% to 57%.
- ▶ **An analysis of the 25 highest-budget films across selected US studios each year finds they account for a disproportionate share of the production activity examined in this analysis, representing roughly two-thirds of the film production budget and half of the cast and crew, on average.** This indicates that production budget has significant concentration in a relatively small number of larger-scale productions. Within these top films:
 - The share of budget for films with significant US-based production declined from 74% to 34% (a 40 percentage-point decrease).
 - The share of films with significant US-based production declined from 75% to 36% (a 39 percentage-point decrease).
 - The share of total cast and crew working on selected US studio films with significant US-based production declined from 74% to 31% (a 43 percentage-point decrease).

⁵ Cast and crew refers to the total number of people working on film and television productions. Different productions have different numbers of cast and crew and, on average, the larger the budget, the higher the number of cast and crew. Cast and crew includes actors, directors, writers, producers, hair and makeup, costume design, composers, cinematographers, art department, camera and electrical department, production finance and accounting department, legal department, transportation department, and other personnel working on these productions.

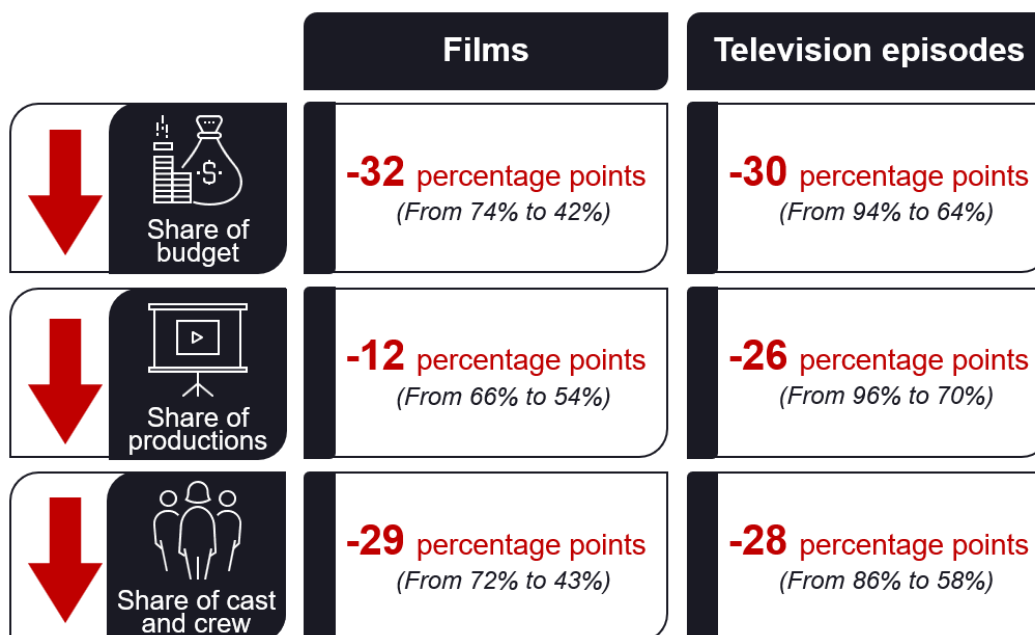
This pattern mirrors the broader analysis, albeit with a somewhat larger decline.

Primary television production location⁶

- ▶ **The share of production budget by selected US studios for television episodes with significant US-based production declined from 94% to 64% (a 30 percentage-point decrease).** The share of production budget for television episodes produced primarily in the United States declined from 94% to 64%, and the share of production budget for television episodes with partial US-based filming remained below 1% in both periods. The share of production budget for television episodes produced primarily outside the United States increased from 6% to 36%. Had these shares not changed, production budget for television episodes with significant US-based production would be approximately \$2 billion higher each year.
- ▶ **The share of television episodes by selected US studios with significant US-based production declined from 96% to 70% (a 26 percentage-point decrease).** The share of television episodes produced primarily in the United States declined from 96% to 70%, and the share of television episodes with partial US-based filming remained below 1% in both periods. The share of television episodes produced primarily outside the United States increased from 4% to 30%.
- ▶ **Of all cast and crew working on television episodes by selected US studios, the share working on television episodes with significant US-based production declined from 86% to 58% (a 28 percentage-point decrease).** The share of cast and crew for television episodes produced primarily in the United States declined from 86% to 57%, and the share of cast and crew for television episodes with partial US-based filming slightly increased from less than 1% to 1%. The share of cast and crew for television episodes produced primarily outside the United States increased from 14% to 42%.

⁶ Longitudinal analysis of television production is constrained by substantial structural change over time. The rise of streaming fundamentally altered production scale, budgets, season lengths, and release models, creating discontinuities in what constitutes a comparable television series across periods. As a result, the television analysis is necessarily narrower in scope than the film analysis.

Figure ES-1. Long-term change in share of films and television episodes with significant US-based production over the last 25 years for selected US studios



Note: Figure shows the change in the share of scripted, live-action film and television productions with significant US-based production, comparing three-year averages. The 25-year change compares 1999-2001 with 2022-2024 for selected US studios. Films include those with a budget $\geq$ \$5M. Television includes episodes $\leq$ 40 minutes with a budget per episode $\geq$ \$1M, and episodes $>$ 40 minutes with a budget $\geq$ \$1.7M. Budget thresholds are in inflation-adjusted 2025 dollars. Figures are rounded. Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

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25-year change in the location of film and television production for selected US studios

I. Introduction

Over the last 25 years, an increasing share of US film and television production has moved to foreign locations, reshaping an industry that supports more than 2 million US jobs.¹ This shift has unfolded alongside sweeping technological, structural, and economic changes across the industry. The rise of streaming platforms shifted television distribution and consumption toward on-demand access, contributing to the decline of traditional cable television and traditional release models.² At the same time, film and television production has been reshaped by evolving tax incentive programs across the United States and internationally.³ Together with major external disruptions, most notably the COVID-19 pandemic and recent industry-wide contraction, these forces have significantly altered production practices.⁴

This report examines the extent to which film and television production has shifted from US-based locations to foreign locations; it does not endeavor to explain why that migration has occurred. Specifically, it measures this geographic relocation by examining where scripted, live-action productions with budgets above minimum thresholds by major US-based studios (“selected US studios”) were primarily filmed, as well as the production budget and number of cast and crew associated with each location. The analysis compares three three-year periods (1999-2001, 2015-2017, and 2022-2024) to capture both medium- and long-term shifts in film production patterns. Using multi-year averages reduces the influence of year-specific volatility, such as temporary external shocks (e.g., labor strikes) or one-off, unusually high-budget films or television productions, allowing the results to better reflect underlying structural changes rather than short-term anomalies. The 1999-2001 and 2015-2017 periods are each compared to 2022-2024, which reflects the most recent three-year period with complete data at the time of the analysis.

Each production is assigned to one of three filming-location categories:

1. **“Primarily in the United States”**: Filmed mostly or entirely in the United States
2. **“Primarily outside the United States”**: Filmed mostly or entirely outside the United States
3. **“Partial US-based filming”**: Significant filming both inside and outside the United States

A geographic detail case study is presented for film production budget, where the location data are most complete.

Methodology

The following steps describe how the dataset of films and television episodes was constructed:

1. Identify the selected US studios to include in the analysis. The studios included in the analysis are those with large and sustained scripted, live-action content across film and television formats, as measured by their share of total production budgets and release counts. The resulting set of studios and their affiliates captures the majority of productions released by US-based studios.⁵

2. The analysis focuses on scripted, live-action film and television productions and excludes animation, advertisements, news, live events, sports, reality programming, and game shows.
3. Collect the following data for each production in the dataset:
 - Release year⁶
 - Runtime
 - Episode count (for television series)
 - Cast and crew (this includes actors, directors, writers, producers, hair and makeup, costume design, composers, cinematographers, art department, camera and electrical department, production finance and accounting department, legal department, transportation department, and other personnel working on films and television productions)
 - Production studio
 - Genre
 - Film and television series award nominations
 - Cast and director award nominations
 - Production budget
 - Filming locations

Data sources include IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), and the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), as well as desktop research. These sources include both publicly available and proprietary industry data.

4. Estimate production budgets that are not available using separate regression models for film and television. These models estimate a production's budget as a function of the following characteristics: count of cast and crew, genre, production studio, runtime, number of episodes (for television), filming location, year of release, and award nominations.⁷
5. Limit the film and television productions to those meeting certain minimum budget thresholds. These productions represent a large share of studio budget and have sufficient scale to make strategic location decisions between domestic and international filming.⁸
 - Films are included if their production budgets meet or exceed \$5 million in inflation-adjusted 2025 dollars.
 - Television episodes are included if they meet or exceed \$1 million (for episodes 40 minutes or shorter) or \$1.7 million (for longer episodes), in inflation-adjusted 2025 dollars.
6. Categorize films and television episodes by primary filming location. Using the collected filming-location information, each title is assigned to the category that reflects where most production activity occurred.⁹ Productions fall into three groups:

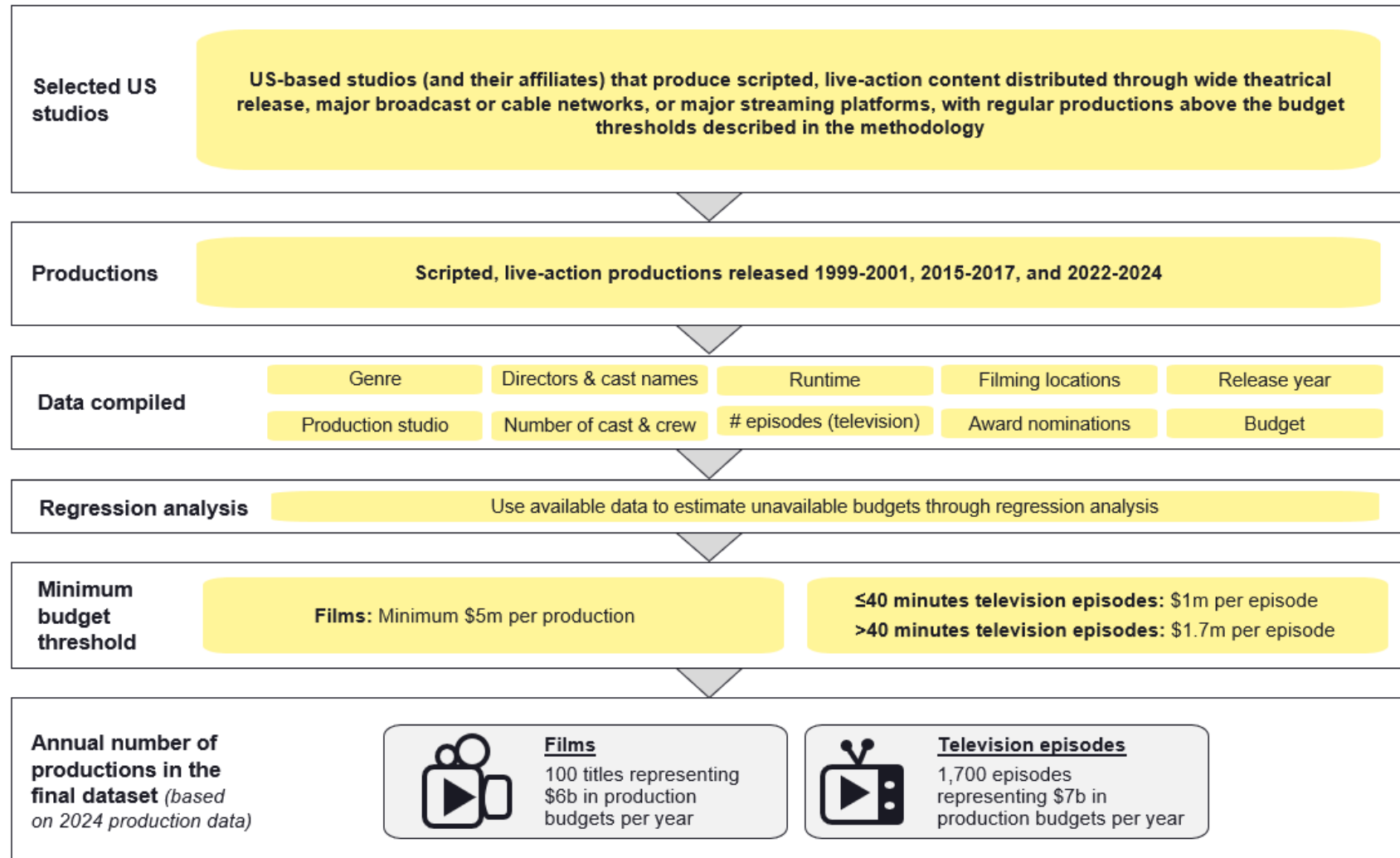
- Primarily in the United States: Filmed entirely in the United States or designated, based on available data, as having its primary filming location inside the United States.
- Primarily outside the United States: Filmed outside the United States or designated, based on available data, as having its primary filming location outside the United States.
- Partial US-based filming: Filming occurred both inside and outside the United States, with no single country identified as the primary location based on the available data.

In the results section below, “**significant US-based production**” refers to films and television episodes produced primarily in the United States or with partial US-based filming.

To illustrate the scope of the dataset, in 2024 alone, the most recent full year of data, this captures approximately 100 films representing \$6 billion in production budgets and 1,700 television episodes representing \$7 billion in production budgets.

Longitudinal analysis of television production is constrained by substantial structural change over time. The rise of streaming fundamentally altered production scale, budgets, season lengths, and release models, creating discontinuities in what constitutes a comparable television series across periods. Accordingly, this report produces more detailed results for film than television.

Figure 1. Dataset overview



Note: Budget thresholds are in inflation-adjusted 2025 dollars. Data sources include IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), and desktop research. These sources include both publicly available and proprietary industry data.

II. Change in the location of film production

This section examines the evolving landscape of film production by analyzing changes in budget allocation, productions, and cast and crew over time. The analysis focuses on medium-term (approximately 10-year) and long-term (approximately 25-year) shifts, using the periods 2015-2017 and 1999-2001 as reference points, respectively, with comparisons made to the most recent data from 2022-2024.

The total value of film production with budgets above the minimum thresholds by selected US studios averaged approximately \$7 billion annually between 2022 and 2024, increasing from about \$3 billion in 1999-2001 and \$5 billion in 2015-2017. Although this represents substantial growth in nominal production value, it largely reflects broader trends in the US economy. For example, US gross domestic product (GDP) increased from an average of approximately \$10 trillion in 1999-2001 to about \$28 trillion in 2022-2024.¹⁰ That is, whereas the US economy increased by a factor of 2.7, the film production budget increased by a factor of 2.3 in the same time period.

Change in production budget

► **Medium-term change (2015-2017 to 2022-2024):**

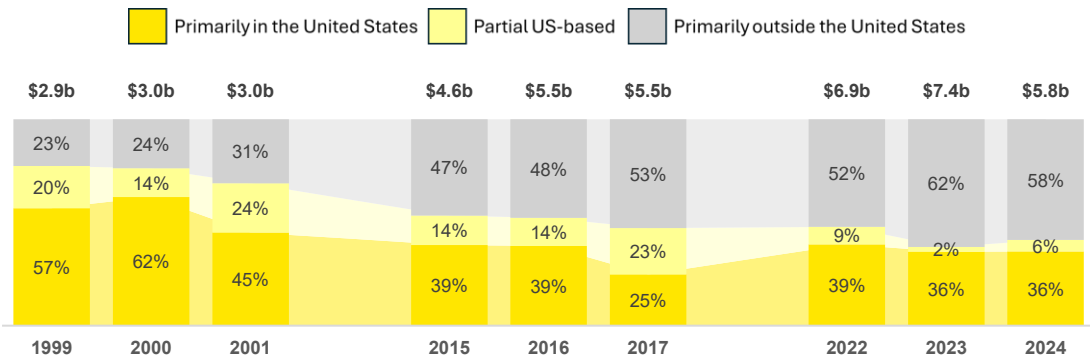
- **The share of production budget by selected US studios for films with significant US-based production declined from 50% to 42% (an 8 percentage-point decrease).** The share of production budget for films produced primarily in the United States increased from 33% to 37%, while the share of production budget for films with partial US-based filming declined from 17% to 5%. The share of production budget for films produced primarily outside the United States increased from 50% to 58%. Had these shares not changed, annual production budget for films with significant US-based production would be approximately \$500 million higher.

► **Long-term change (1999-2001 to 2022-2024):**

- **The share of production budget by selected US studios for films with significant US-based production declined from 74% to 42% (a 32 percentage-point decrease).** The share of production budget for films produced primarily in the United States declined from 55% to 37%, and the share of production budget for films with partial US-based filming declined from 19% to 5%. The share of production budget for films produced primarily outside the United States increased from 26% to 58%. Had these shares not changed, annual production budget for films with significant US-based production would be approximately \$2 billion higher.

Figure 2 shows annual changes in film production budgets by primary filming location from 1999 to 2024 for the three three-year periods.

Figure 2. Total film budget by year and primary filming location for selected US studios



Note: Figure shows the annual change in the share of scripted, live-action film productions with significant US-based production for selected US studios. Films include those with a budget $\geq$ \$5M. Budget thresholds are in inflation-adjusted 2025 dollars. Figures are rounded.

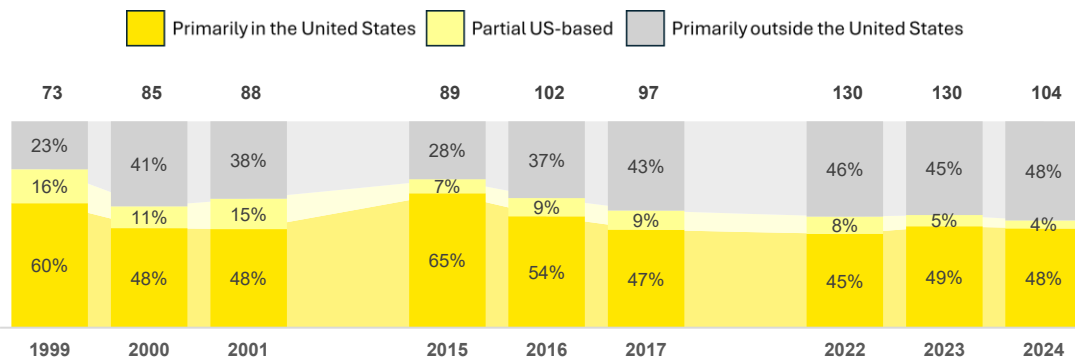
Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

Change in number of productions

- ▶ **Medium-term change (2015-2017 to 2022-2024):**
 - **The share of films by selected US studios with significant US-based production declined from 64% to 54% (a 10 percentage-point decrease).** The share of films produced primarily in the United States declined from 55% to 48%, and the share of films with partial US-based filming declined from 9% to 6%. The share of films produced primarily outside the United States increased from 36% to 46%.
- ▶ **Long-term change (1999-2001 to 2022-2024):**
 - **The share of films by selected US studios with significant US-based production declined from 66% to 54% (a 12 percentage-point decrease).** The share of films produced primarily in the United States declined from 52% to 48%, and the share of films with partial US-based filming declined from 14% to 6%. The share of films produced primarily outside the United States increased from 34% to 46%.

Figure 3 shows annual changes in the number of films by primary filming location for selected US studios from 1999 to 2024 for the three three-year periods.

Figure 3. Total films by year and primary filming location for selected US studios



Note: Figure shows the annual change in the share of scripted, live-action film productions with significant US-based production for selected US studios. Films include those with a budget $\geq$ \$5M. Budget thresholds are in inflation-adjusted 2025 dollars. Figures are rounded.

Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

Change in cast and crew

► **Medium-term change (2015-2017 to 2022-2024):**

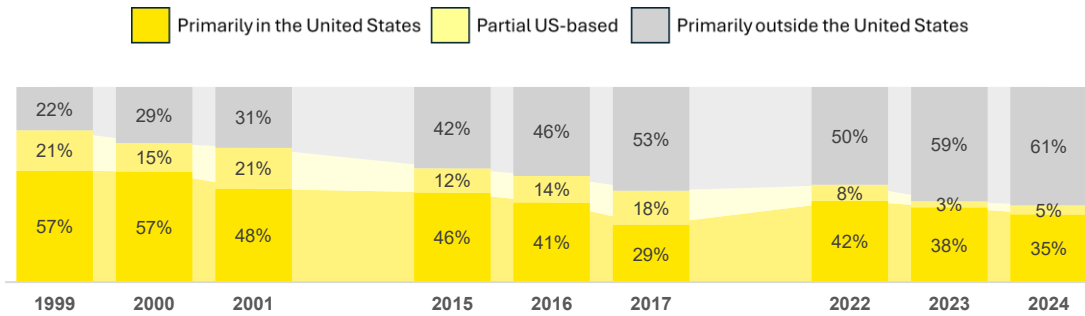
- **For total cast and crew working on selected US studio films, the share working on films with significant US-based production declined from 52% to 43% (a 9 percentage-point decrease).** The share of cast and crew for films produced primarily in the United States remained relatively unchanged in this time period, and the share of cast and crew for films with partial US-based filming declined from 14% to 5%. The share of cast and crew for films produced primarily outside the United States increased from 48% to 57%.

► **Long-term change (1999-2001 to 2022-2024):**

- **For total cast and crew working on selected US studio films, the share working on films with significant US-based production declined from 72% to 43% (a 29 percentage-point decrease).** The share of cast and crew for films produced primarily in the United States declined from 53% to 38%, and the share of cast and crew for films with partial US-based filming declined from 19% to 5%. The share of cast and crew for films produced primarily outside the United States increased from 28% to 57%.

Figure 4 shows annual changes in the distribution of cast and crew of films by primary filming location from 1999 to 2024 for selected US studios for the three three-year periods.

Figure 4. Distribution of total cast and crew by year and primary filming location for selected US studios

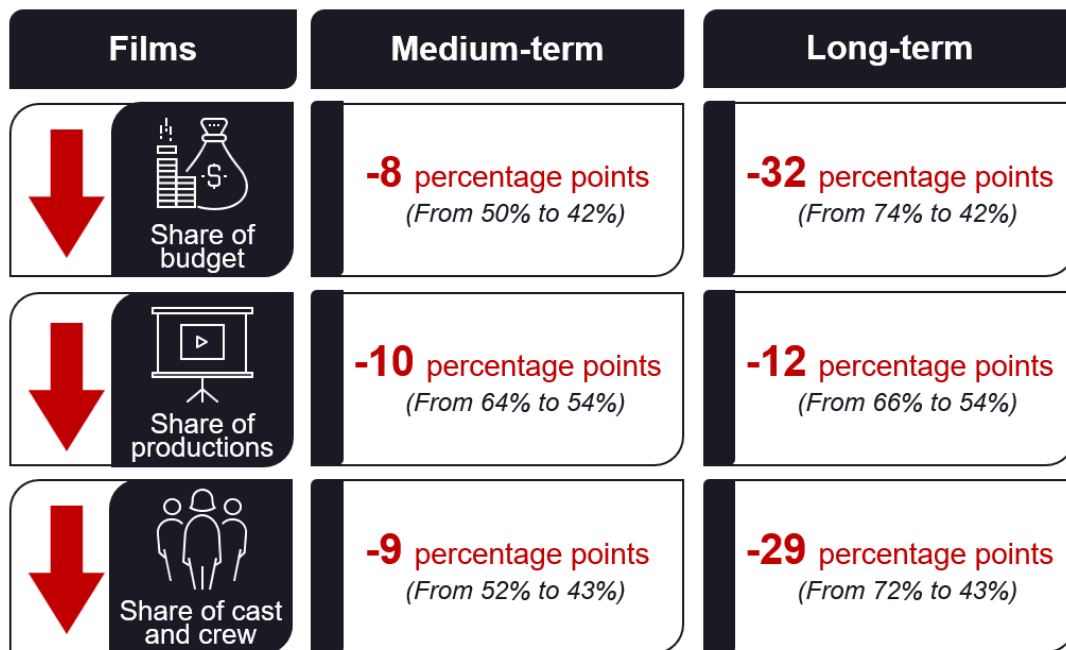


Note: Figure shows the annual change in the share of scripted, live-action film productions with significant US-based production for selected US studios. Films include those with a budget $\geq$ \$5M. Budget thresholds are in inflation-adjusted 2025 dollars. Figures are rounded.

Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

Figure 5 shows the three-year average change in the distribution of budget, number of productions, and cast and crew of films by primary filming location for selected US studios.

Figure 5. Change in share of films with significant US-based production over the last 25 years for selected US studios



Note: Figure shows the change in the share of scripted, live-action film productions with significant US-based production, comparing three-year averages. Medium-term changes compare 2015-2017 with 2022-2024, and long-term changes compare 1999-2001 with 2022-2024, for selected US studios. Films include those with a budget $\geq$ \$5M. Budget thresholds are in inflation-adjusted 2025 dollars. Figures are rounded.

Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical

Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

To further assess the shift in production location, below is a case study that explores the shift in film production share for selected US studios across countries as a share of global production.

Case study

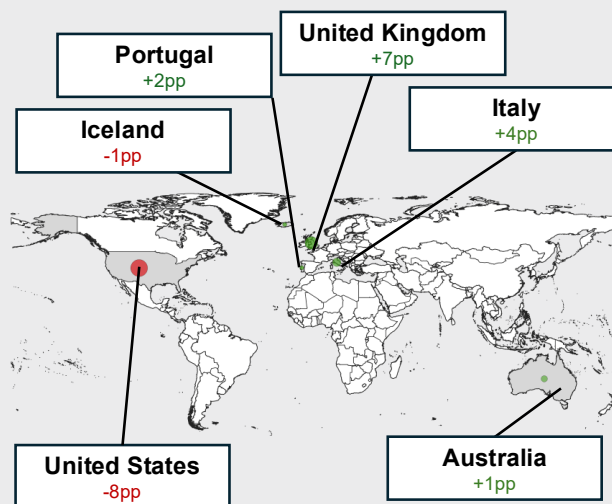
Shift in film production share for selected US studios across countries as a share of global production

The primary filming locations used by selected US studios have shifted over the past 25 years, driven largely by a small number of countries. This case study focuses on the five countries that both ranked among the largest filming destinations by budget in 2024 and recorded increases in their share of film production spending by selected US studios over the 25-year period.

Medium-term change

From 2015-2017 to 2022-2024, the share of budget associated with filming in the United States declined by 8pp. Over the same period, the United Kingdom increased by 7pp, Italy by 4pp, Portugal by 2pp, and Australia by 1pp, while Iceland decreased by 1pp.

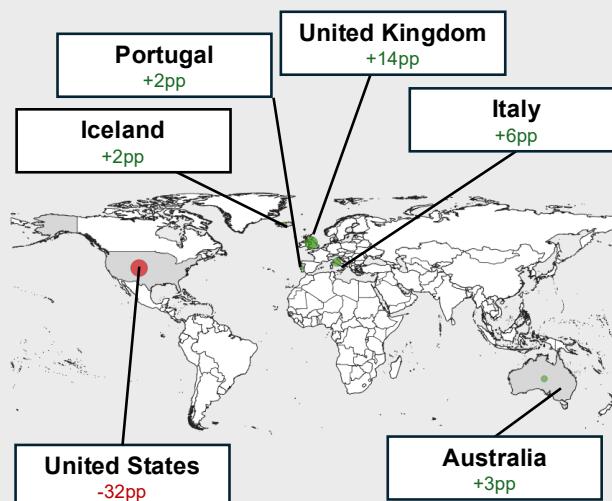
Medium-term change



Long-term change

From 1999-2001 to 2022-2024, the United States saw a 32pp decline in filming budget share. In contrast, the United Kingdom increased by 14pp, Italy by 6pp, and Australia by 3pp, while Iceland and Portugal both increased by 2pp.

Long-term change



Note: The United States is displayed for reference. Figure shows change in the share of film production spending by country for scripted, live-action films using three-year averages. Medium-term changes compare 2015-2017 with 2022-2024, and long-term changes compare 1999-2001 with 2022-2024, for selected US studios. Films include those with a budget $\geq$ \$5M. Budget thresholds are in inflation-adjusted 2025 dollars. Any film with significant filming in the United States is allocated to the United States, whereas any film produced mostly or entirely outside the United States is allocated across the countries where filming occurred. If a production is filmed in multiple countries, its production budget is prorated equally across all associated countries. Note that Canada was excluded from this case study as it saw a decrease in filming budget share. Figures are rounded. Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

III. Change in the location of the top 25 film productions per year

This section examines changes in the primary filming locations of the 25 films with the highest budget released by selected US studios each year. An analysis of these films shows that they account for a disproportionate share of the activity examined by this analysis, representing about two-thirds of total film budgets and half of cast and crew, on average. This highlights that production budgets are heavily concentrated within a small subset of films. Patterns observed within this group generally reflect the broader analysis trends, albeit with a somewhat larger decline.

Change in production budget

► **Medium-term change (2015-2017 to 2022-2024):**

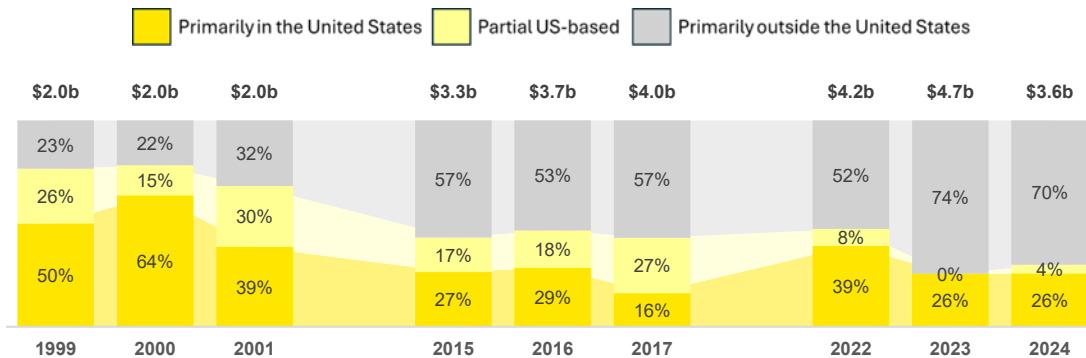
- **The share of production budget of selected US studios for films with significant US-based production declined from 44% to 34% (a 10 percentage-point decrease).** The share of production budget for films produced primarily in the United States increased from 24% to 30%, while the share of production budget for films with partial US-based filming declined from 20% to 4%. The share of production budget for films produced primarily outside the United States increased from 56% to 66%. Had these shares not changed, annual production budget for films with significant US-based production would be approximately \$400 million higher.

► **Long-term change (1999-2001 to 2022-2024):**

- **The share of production budget of selected US studios for films with significant US-based production declined from 74% to 34% (a 40 percentage-point decrease).** The share of production budget for films produced primarily in the United States declined from 50% to 30%, and the share of production budget for films with partial US-based filming declined from 24% to 4%. The share of production budget for films produced primarily outside the United States increased from 26% to 66%. Had these shares not changed, annual production budget for films with significant US-based production would be approximately \$1.5 billion higher.

Figure 6 shows annual changes in film production budgets by primary filming location from 1999 to 2024 for the three three-year periods.

Figure 6. Total film budget by year and primary filming location, top 25 films per year across selected US studios



Note: Figure shows the annual change in the share of scripted, live-action film productions with significant US-based production for selected US studios. Films include those with a budget $\geq$ \$5M. Budget thresholds are in inflation-adjusted 2025 dollars. Figures are rounded.

Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

Change in number of productions

► **Medium-term change (2015-2017 to 2022-2024):**

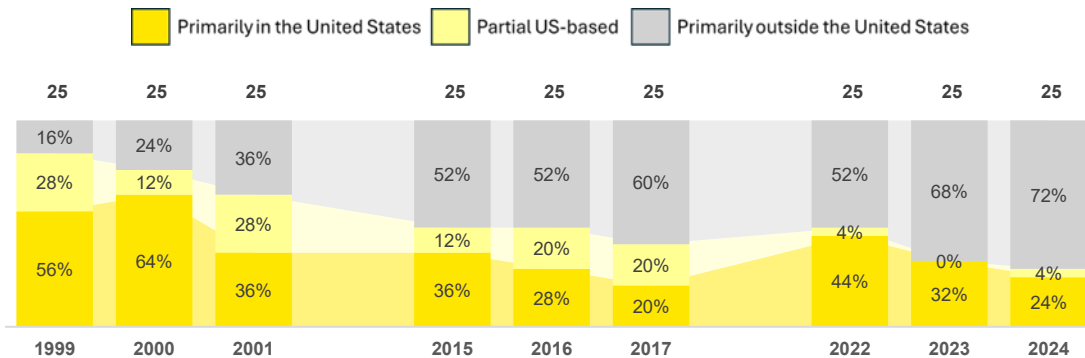
- **The share of films by selected US studios with significant US-based production declined from 45% to 36% (a 9 percentage-point decrease).** The share of films produced primarily in the United States increased from 28% to 33%, and the share of films with partial US-based filming declined from 17% to 3%. The share of films produced primarily outside the United States increased from 55% to 64%.

► **Long-term change (1999-2001 to 2022-2024):**

- **The share of films by selected US studios with significant US-based production declined from 75% to 36% (a 39 percentage-point decrease).** The share of films produced primarily in the United States declined from 52% to 33%, and the share of films with partial US-based filming declined from 23% to 3%. The share of films produced primarily outside the United States increased from 25% to 64%.

Figure 7 shows annual changes in the number of films by primary filming location from 1999 to 2024 for the three three-year periods.

Figure 7. Total films by year and primary filming location, top 25 films per year across selected US studios



Note: Figure shows the annual change in the share of scripted, live-action film productions with significant US-based production for selected US studios. Films include those with a budget $\geq$ \$5M. Budget thresholds are in inflation-adjusted 2025 dollars. Figures are rounded.

Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

Change in cast and crew

► **Medium-term change (2015-2017 to 2022-2024):**

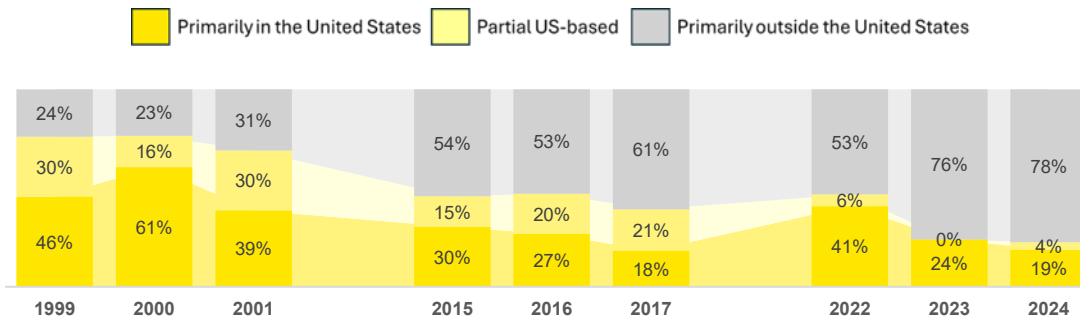
- **For total cast and crew working on selected US studio films, the share working on films with significant US-based production declined from 44% to 31% (a 13 percentage-point decrease).** The share of cast and crew for films produced primarily in the United States increased slightly from 25% to 28%, and the share of cast and crew for films with partial US-based filming declined from 19% to 3%. The share of cast and crew for films produced primarily outside the United States increased from 56% to 69%.

► **Long-term change (1999-2001 to 2022-2024):**

- **For total cast and crew working on selected US studio films, the share working on films with significant US-based production declined from 74% to 31% (a 43 percentage-point decrease).** The share of cast and crew for films produced primarily in the United States declined from 48% to 28%, and the share of cast and crew for films with partial US-based filming declined from 26% to 3%. The share of cast and crew for films produced primarily outside the United States increased from 26% to 69%.

Figure 8 shows annual changes in the distribution of cast and crew of films by primary filming location from 1999 to 2024 for the three three-year periods.

Figure 8. Distribution of total cast and crew by year and primary filming location, top 25 films per year across selected US studios

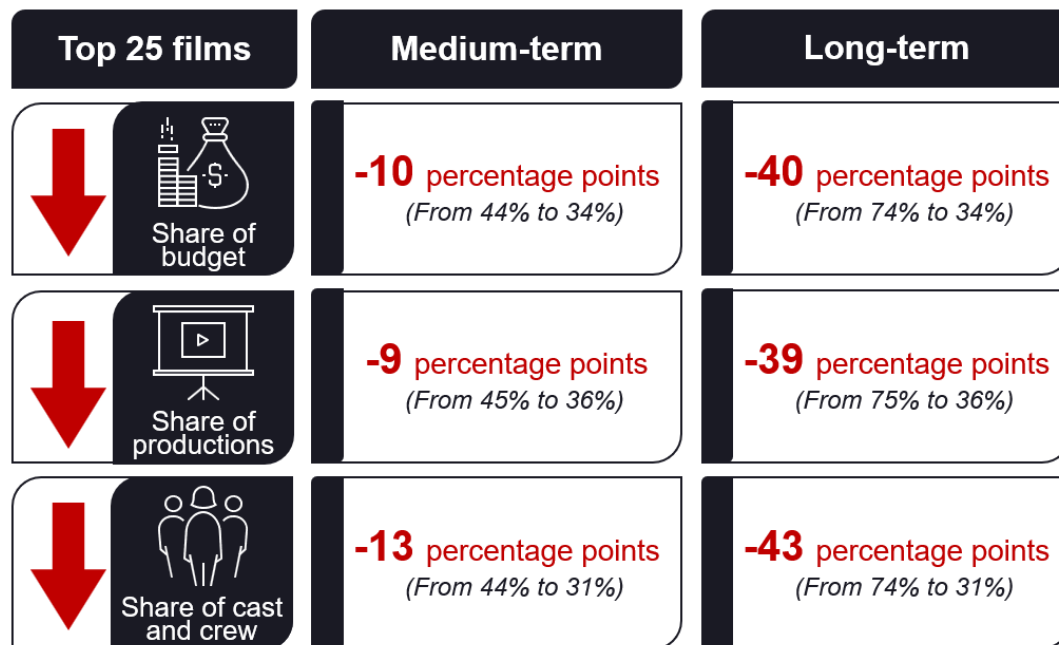


Note: Figure shows the annual change in the share of scripted, live-action film productions with significant US-based production for selected US studios. Films include those with a budget $\geq$ \$5M. Budget thresholds are in inflation-adjusted 2025 dollars. Figures are rounded.

Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

Figure 5 shows the three-year average change in the distribution of budget, number of productions, and cast and crew of films by primary filming location for the top 25 films.

Figure 9. Change in share of top 25 films with significant US-based production over the last 25 years across selected US studios



Note: Figure shows the change in the share of scripted, live-action film productions with significant US-based production, comparing three-year averages. Medium-term changes compare 2015-2017 with 2022-2024, and long-term changes compare 1999-2001 with 2022-2024, for selected US studios. Films include those with a budget $\geq$ \$5M. Budget thresholds are in inflation-adjusted 2025 dollars. Figures are rounded.

Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical

Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

IV. Change in the location of television episode production

This section examines the evolving landscape of television episode production by analyzing changes in budget allocation, productions, and cast and crew over time. The analysis focuses on medium-term and long-term shifts, using the periods 2015-2017 and 1999-2001 as reference points, respectively, with comparisons made to the most recent data from 2022-2024.

As noted elsewhere in the report, the number of television episodes meeting the budget thresholds is limited. This reflects structural changes over the last 25 years, particularly the rise of streaming, which has altered budgets, season lengths, and release models. In earlier years, fewer episodes met the threshold because television budgets were generally lower, whereas increases in budgets over time have expanded the number of qualifying episodes in more recent periods.

Change in production budget

► **Medium-term change (2015-2017 to 2022-2024):**

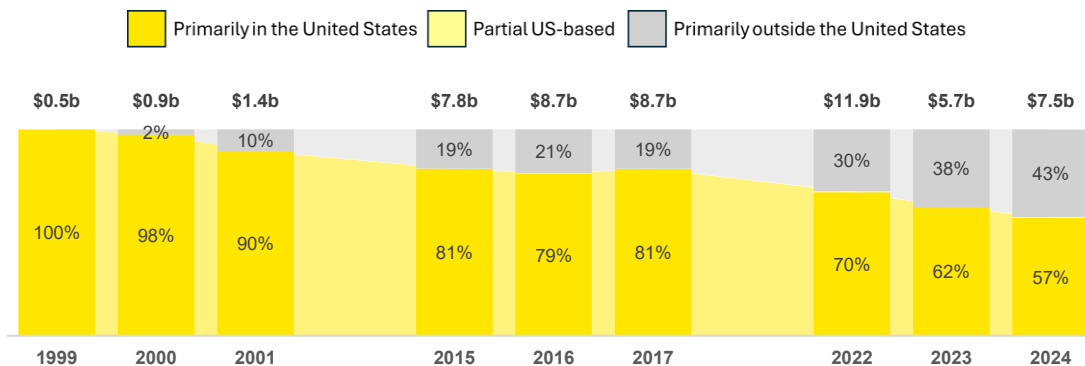
- **The share of production budget of selected US studios for television episodes with significant US-based production declined from 80% to 64% (a 16 percentage-point decrease).** The share of production budget for television episodes produced primarily in the United States declined from 80% to 64%, and the share of production budget for television episodes with partial US-based filming remained below 1% in both periods. The share of production budget for television episodes produced primarily outside the United States increased from 20% to 36%. Had these shares not changed, production budget for television episodes with significant US-based production would be approximately \$1 billion higher each year.

► **Long-term change (1999-2001 to 2022-2024):**

- **The share of production budget of selected US studios for television episodes with significant US-based production declined from 94% to 64% (a 30 percentage-point decrease).** The share of production budget for television episodes produced primarily in the United States declined from 94% to 64%, and the share of production budget for television episodes with partial US-based filming remained below 1% in both periods. The share of production budget for television episodes produced primarily outside the United States increased from 6% to 36%. Had these shares not changed, production budget for television episodes with significant US-based production would be approximately \$2 billion higher each year.

Figure 10 shows annual changes in television episode budgets by primary filming location for selected US studios from 1999 to 2024 for the three three-year periods.

Figure 10. Total television episode budget by year and primary filming location for selected US studios



Note: Figure shows the annual change in the share of scripted, live-action television episode productions with significant US-based production for selected US studios. Television includes episodes ≤40 minutes with a budget per episode ≥\$1M, and episodes >40 minutes with a budget ≥\$1.7M. Budget thresholds are in inflation-adjusted 2025 dollars. The sample includes relatively few television episodes in 1999–2001 due to limited availability of productions that meet the selection criteria. Figures are rounded. Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

Change in number of productions

► **Medium-term change (2015-2017 to 2022-2024):**

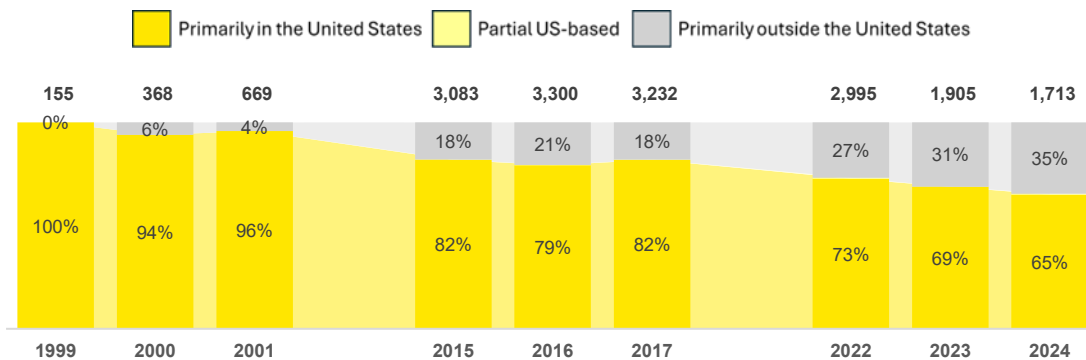
- **The share of television episodes by selected US studios with significant US-based production declined from 81% to 70% (an 11 percentage-point decrease).** The share of television episodes produced primarily in the United States declined from 81% to 70%, and the share of television episodes with partial US-based filming remained below 1% in both periods. The share of television episodes produced primarily outside the United States increased from 19% to 30%.

► **Long-term change (1999-2001 to 2022-2024):**

- **The share of television episodes by selected US studios with significant US-based production declined from 96% to 70% (a 26 percentage-point decrease).** The share of television episodes produced primarily in the United States declined from 96% to 70%, and the share of television episodes with partial US-based filming remained below 1% in both periods. The share of television episodes produced primarily outside the United States increased from 4% to 30%.

Figure 11 shows annual changes in the number of television episodes by primary filming location for selected US studios from 1999 to 2024 for the three three-year periods.

Figure 11. Total number of television episodes by year and primary filming location for selected US studios



Note: Figure shows the annual change in the share of scripted, live-action television episode productions with significant US-based production for selected US studios. Television includes episodes ≤40 minutes with a budget per episode ≥\$1M, and episodes >40 minutes with a budget ≥\$1.7M. Budget thresholds are in inflation-adjusted 2025 dollars. The sample includes relatively few television episodes in 1999–2001 due to limited availability of productions that meet the selection criteria. Figures are rounded. Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

Change in cast and crew

► **Medium-term change (2015-2017 to 2022-2024):**

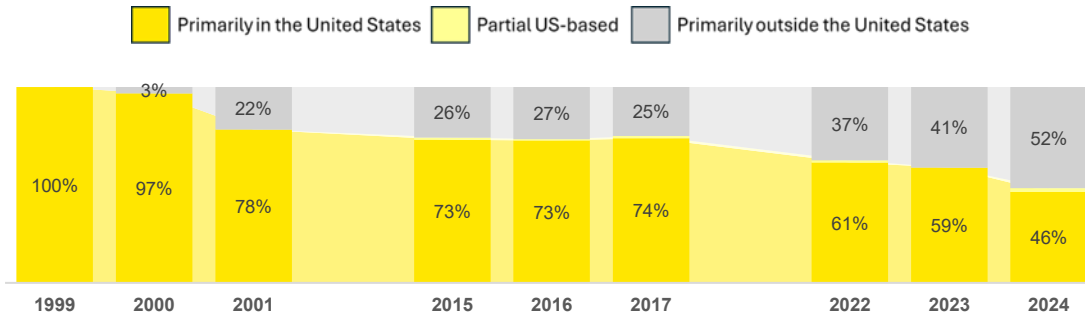
- **For total cast and crew working on selected US studio television episodes, the share working on television episodes with significant US-based production declined from 74% to 58% (a 16 percentage-point decrease).** The share of cast and crew for television episodes produced primarily in the United States declined from 73% to 57%, and the share of cast and crew for television episodes with partial US-based filming remained around 1% in both periods. The share of cast and crew for television episodes produced primarily outside the United States increased from 26% to 42%.

► **Long-term change (1999-2001 to 2022-2024):**

- **For total cast and crew working on selected US studio television episodes, the share working on television episodes with significant US-based production declined from 86% to 58% (a 28 percentage-point decrease).** The share of cast and crew for television episodes produced primarily in the United States declined from 86% to 57%, and the share of cast and crew for television episodes with partial US-based filming slightly increased from less than 1% to 1%. The share of cast and crew for television episodes produced primarily outside the United States increased from 14% to 42%.

Figure 12 shows annual changes in the distribution of cast and crew of television episodes by primary filming location for selected US studios from 1999 to 2024 for the three three-year periods.

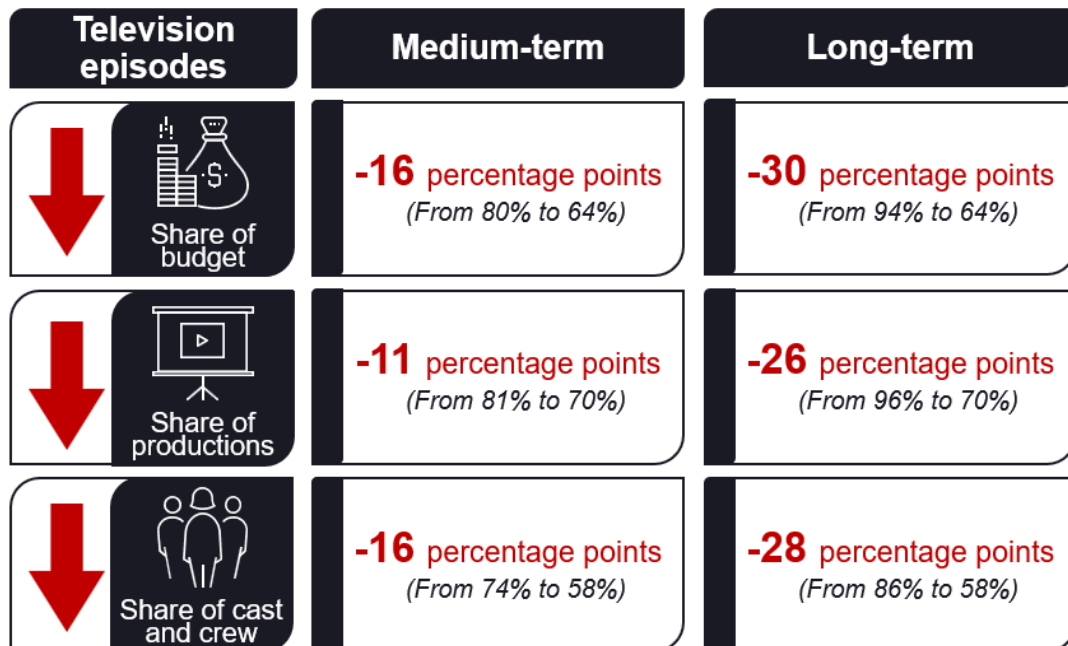
Figure 12. Distribution of total cast and crew by year and primary filming location for selected US studios



Note: Figure shows the annual change in the share of scripted, live-action television episode productions with significant US-based production for selected US studios. Television includes episodes ≤40 minutes with a budget per episode ≥\$1M, and episodes >40 minutes with a budget ≥\$1.7M. Budget thresholds are in inflation-adjusted 2025 dollars. The sample includes relatively few television episodes in 1999–2001 due to limited availability of productions that meet the selection criteria. Figures are rounded.
Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

Figure 13 shows the three-year average change in the distribution of budget, number of productions, and cast and crew of television episodes by primary filming location for selected US studios.

Figure 13. Change in share of television episodes with significant US-based production over the last 25 years for selected US studios



Note: Figure shows the change in the share of scripted, live-action television episodes with significant US-based production, comparing three-year averages. Medium-term changes compare 2015-2017 with 2022-2024, and long-term changes compare 1999-2001 with 2022-2024, for selected US studios. Television includes episodes ≤40 minutes with a budget per episode ≥\$1M, and episodes >40 minutes

with a budget per episode $\geq$ \$1.7M. Budget thresholds are in inflation-adjusted 2025 dollars. Figures are rounded.

Source: IMDb, S&P Capital IQ, New York State Film Tax Credit Program, California Film Commission Tax Credit Program, the Directors Guild of America (DGA), the International Alliance of Theatrical Stage Employees (IATSE), the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA), desktop research, and EY analysis.

V. Caveats and limitations

The estimates presented in this report are based on the data and assumptions described in the methodology section. Readers should be aware of the following limitations.

- ▶ **The analysis is limited to scripted, live-action productions from selected US-based studios above the minimum budget thresholds.** By focusing on productions by selected US studios and their affiliated studios that meet these thresholds, the dataset captures a large share of US film and television production; it does not, however, capture the entirety of US film and television production. The dataset excludes smaller independent projects, lower-budget content, and productions released by non-US studios. Certain productions—such as news, animation, live events, and reality television—are also excluded from the analysis.
- ▶ **The results compare three snapshots of film and television production.** The dataset benchmarks 1999-2001, 2015-2017, and 2022-2024, thereby capturing the shift across these periods but not other years.
- ▶ **Estimates are limited by available data.** The underlying data come from publicly available and proprietary sources with varying levels of detail and consistency. These constraints mean the dataset reflects the best available information but may not include all relevant productions or exact financial details for every title.
- ▶ **Budget estimates for some productions rely on regression models.** Where actual budget data are unavailable, production budgets are estimated using regression models based on observable production characteristics such as cast and crew counts, genre, and primary filming location. These estimates are subject to model error and may not reflect actual production budgets.
- ▶ **The primary filming location classification is a simplified categorization of production activity.** Each title is assigned to one of three categories (primarily in the United States, primarily outside the United States, or partial US-based filming) based on the available data, which may be incomplete depending on the title and data source. Because data on how budgets or filming days are allocated across locations are not available, this approach does not fully reflect the actual distribution of production activity.
- ▶ **Television seasons are assigned locations at the series level, not the episode level.** Because episode-level filming data are not available for television, each season is assigned the location or locations associated with the series overall. As a result, the approach may overstate or understate the share of production activity in a given location for seasons with significant variation in filming locations across episodes.
- ▶ **The geographic case study prorates production budgets equally across locations.** If a production is filmed in multiple countries or states, its production budget is prorated equally across all associated locations. This approach may not reflect the actual distribution of production budget across locations.

Endnotes

¹ For more information on US employment supported by the film and television industry, see Motion Picture Association (2025). The American motion picture and television industry: Creating jobs, trading around the world.

² See: Reid, C. (2024, October 24). *Why streaming content could be Hollywood's final act*. Forbes. <https://www.forbes.com/sites/carolinereid/2024/10/24/why-streaming-could-be-hollywoods-final-act/>

³ See, for example: House of Commons Library. (2024, September 5). *The creative industries tax reliefs: Policy and development* (Research Briefing CBP-10093). UK Parliament. <https://commonslibrary.parliament.uk/research-briefings/cbp-10093/>; Bloomberg Tax. (2022, August 5). *Iceland parliament passes bill to increase tax incentive for film productions*. <https://news.bloombergtax.com/daily-tax-report-international/iceland-parliament-passes-bill-to-increase-tax-incentive-for-film-productions>; and Georgia Department of Economic Development. (n.d.). *Georgia film & television production incentives*. <https://georgia.org/industries/film-entertainment/georgia-film-tv-production/production-incentives>

⁴ See: Flint, J., & Watson, R. T. (2021, July 29). *Hollywood productions halted as Covid-19 emerges on sets again*. *The Wall Street Journal*. <https://www.wsj.com/business/media/hollywood-productions-halted-as-covid-19-emerges-on-sets-again-11627551001>

⁵ A review of multiple industry reports, market-share datasets, and lists of productions released per year, as well as consultations with trade associations in the industry, was conducted to determine which studios should be included in the analysis. The selected US studios in this analysis include US-based studios (and their affiliates) that produce scripted, live-action content distributed through wide theatrical release, major broadcast or cable networks, or major streaming platforms, with regular productions above the budget thresholds described in the methodology.

⁶ Television seasons are assigned to a period based on the air date of their first episode.

⁷ Initial variable selection for the regression models was informed by a review of existing literature examining the relationship between production attributes and revenue generation. Although production budget was not typically the dependent variable in this literature, it identified covariates commonly associated with budget and commercial performance, including genre, production studio, parental rating, and award nominations. Variable selection was subsequently refined by incorporating additional measures plausibly related to production scale and cost: cast and crew counts, runtime, number of episodes (for television), primary filming location, and whether the production featured an actor or director with an Emmy or Academy Award nomination. Models were estimated using ordinary least squares with polynomial terms for selected variables, and final model specifications were chosen based on statistical testing. Approximately 20% of film budgets and 80% of television episode budgets were estimated using these models.

⁸ Budget thresholds were chosen based on consultations with trade associations in the industry.

⁹ When no single primary location can be determined, the production is assigned to the category that reflects the available location data. For television seasons, only series-level filming data are available; accordingly, all episodes in a series are assigned the same filming-location category as the series overall. This could understate location shifts for series that moved production between seasons.

¹⁰ Bureau of Economic Analysis. (2026). *National income and product accounts, Table 1.1.5. Gross domestic product* [Data set]. U.S. Department of Commerce. Last revised April 9, 2026.