



Sound Stage

Production Report (2018)







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

FilmLA.com

 @FilmLA

 FilmLA

 FilmLAinc

CREDITS:

Contributors:
Anne Wurts
Philip Sokoloski

Graphic Design:
Shane Hirschman

Photography:
Shutterstock

Cover Photo:
Quixote Studios - Pacoima

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INTRODUCTION

Every day in Los Angeles County, up to several hundred locations are used in film shoots. As the regional film office for Greater Los Angeles, FilmLA provides centralized coordination of on-location filming permits. In addition to this role, FilmLA aggregates and publishes quarterly data for on-location film production, covering categories in Television, Feature Films, Commercials, and other types of smaller productions.

Filming on certified sound stages, however, does not require a filming permit. Therefore, a significant portion of filming in the Los Angeles region occurs inside certified production facilities that are not included in our quarterly data sets. In addition to the major Hollywood studios¹ with production/stage facilities, Los Angeles County has dozens of independently-owned, certified sound stages. Some of these independent studios are as large as the Hollywood majors.

The purpose of this ongoing report is to provide a more comprehensive picture of “behind the scenes” production activity on certified sound stages in Los Angeles County. This is FilmLA’s second report on sound stage production activity. The first report was issued in 2017 containing data from 2016.² This report contains data from calendar year 2018. A third study with calendar 2019 data will be issued later this year.

In this 2018 study, a total of 13 studio partners and three new studio facilities are enrolled in the limited data sharing partnership with FilmLA. Recruitment of partners is ongoing. The data in this study covers a total of 17 studio facilities, including all of the major Hollywood studios, plus ten large, independent production studios – Culver Studios, Los Angeles Center Studios, MBS Media Campus, Occidental Studios, Quixote Studios (2 facilities), Raleigh Studios and Sunset Studios (3 studio facilities). It should be noted that each of these 17 facilities operate certified sound stages in a campus-type environment with on-site services and amenities.

Based on the aggregate data from our studio partners, FilmLA analyzed project counts by type of production, stage shoot days, backlot shoot days, and stage utilization/occupancy. To see how stage infrastructure in the Los Angeles region stacks up against the other five global production centers, this report also looked at the competing slate of production infrastructure in other competitive jurisdictions.

1 The Hollywood major studios include Paramount Pictures, Sony Pictures, The Prospect Studios, 20th Century Studios, Inc. (formerly 20th Century Fox Studios), Universal Studios, Walt Disney Studios and Warner Bros. Studios.

2 FilmLA, Sound Stage Production Report.
<https://www.filmla.com/wp-content/uploads/2017/11/sound-stage-study-v3-WEB.pdf>

NOTE: This report was researched prior to the COVID-19 pandemic, which effectively shut down global production in mid-March 2020. At the time of preparing this report, production remains shut down. The resulting impact on future production activity, global infrastructure and existing tax incentives remains to be seen.

PARTICIPATING PARTNERS:



CHARACTERISTICS OF CERTIFIED SOUND STAGES IN GREATER L.A.

Generally speaking, a sound stage is soundproof facility that is used for indoor filming. In Los Angeles County, most certified sound stages are purpose-built structures. Sound stages are certified by government authorities to meet certain standards such for fire detection/suppression, electrical installation and other features. While nearly all purpose-built stages are certified, an adaptive reuse/conversion of a warehouse may or may not be, unless the developer complies with those standards specified in their jurisdiction.

To quantify total certified stage space in Los Angeles County, FilmLA consulted a variety of sources, including information from the Los Angeles County Fire Department, the City of Los Angeles Fire Department, *Creative Handbook*,³ *LA 411*,⁴ other publications, and the individual websites of each facility. In compiling this list, FilmLA excluded approximately 60 facilities that did not have at least one stage of 3,000 square feet or greater. This was primarily to exclude specialized facilities that can only accommodate more niche types of productions. Examples include HDTV studios, VFX studios and photography studios.

It is worth mentioning that making an accurate count of certified stage space is difficult. Reasons include: (1) certification standards and public record keeping vary by local government jurisdiction; and (2) some studios are in the midst of renovation and/or adding stages; and (3) some studios have long-term tenants and therefore may choose to not advertise in publications.

Based on FilmLA's count, the Los Angeles County region has a total of 5.2 million square feet of certified stage space. Comparing this to the data reported in 2016, the amount of available, certified stage space in the market has increased by 500,000 square feet - from approximately 4.7 million.⁵ A total of 52 production facilities contain 384 certified sound stages. This means that the average studio with certified stages in the region contains roughly 100,000 square feet of space. Stage sizes in the data set range from 1,800 to 41,985 square feet.

FilmLA's 13 studio partners comprise the following:

- 17 individual stage facilities—33 percent of the total 52 facilities with certified stages
- 3.5 million square feet or 68 percent of the total square footage of certified stages county-wide
- 246 certified stages—or 64 percent of the all certified stages—up from 232 stages in the last study

In terms of overall ownership of the 5.2 million square feet of certified stage space, the percentages are fairly evenly split between the major Hollywood studios (43 percent) and the 13 large, independently-owned studio facilities (40 percent) that can accommodate film and television production. The only other three major independents not covered in this study are: CBS Studio Center, Santa Clarita Studios and Television City.

The remaining 17 percent of square footage is split among the estimated remaining 32 facilities.

³ <https://www.creativehandbook.com/>

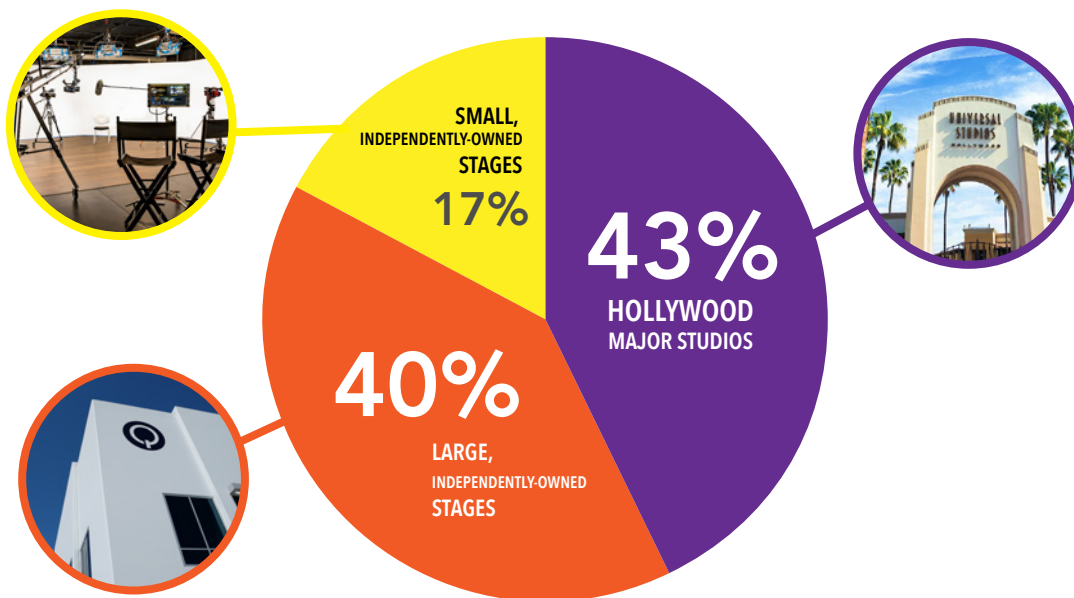
⁴ <https://www.la411.com/>

⁵ FilmLA, Sound Stage Production Report, p. 3.

<https://www.filmLA.com/wp-content/uploads/2017/11/sound-stage-study-v3-WEB.pdf>



SQUARE FOOTAGE OF ALL CERTIFIED STAGES IN L.A. COUNTY: BY TYPE OF FACILITY



NEW ADDITIONS TO STAGE SPACE INFRASTRUCTURE

Since the last study, new studios that have opened in Los Angeles County are as follows:

- Quixote North Valley Studios in Pacoima, which recently opened in August 2019, with 5 stages and approximately 75,000 square feet of stage space.
- L.A. North Studios, which is an adaptive reuse of a former Costco warehouse in Santa Clarita. The facility contains 4 stages and approximately 125,000 square feet of certified stage space.
- Crimson Studios, which is an adaptive reuse of former warehouse space in Chatsworth, opened in 2018 with 5 stages and approximately 40,000 square feet of certified stage space.

Aside from these recent developments, Los Angeles County had no new influx of supply in almost 20 years when both Los Angeles Center Studios and MBS Media Campus (formerly Raleigh Manhattan Beach Studios) opened in the late 1990s.

Recent additions to studio lots since the last study include NBCUniversal's® completion of work on an additional sound stage complex—Area 71—with four additional stages at 18,000 square feet each. This addition opened in January 2018.

OTHER DEDICATED PRODUCTION SPACES

Los Angeles County is home to an estimated 32 additional, dedicated production facilities (84 total) with approximately 500,000 square feet of total space. These additional facilities include only those with at least one stage in excess of 3,000 square feet.

Combining this total with the afore-mentioned 60+ smaller, specialty stages, FilmLA estimates that these additional 90+ facilities represent another one million square feet of production space in Los Angeles County.

All told, FilmLA estimates that the Los Angeles County region currently has over 140 production facilities and approximately 6.2 million total square feet of space. Of this amount, approximately 84 percent – 5.2 million consists of certified stage space.

The following is an analysis of filming activity by our sound stage partners who represent nearly 70 percent of the certified stage space in the regional market.

PRODUCTION ACTIVITY ON CERTIFIED SOUND STAGES IN L.A. COUNTY

FilmLA compiled data from studio partners' project counts, stage shoot days, backlot⁶ shoot days and occupancy by quarter in 2018.

NUMBER OF L.A. PROJECTS ON PARTNER STAGES

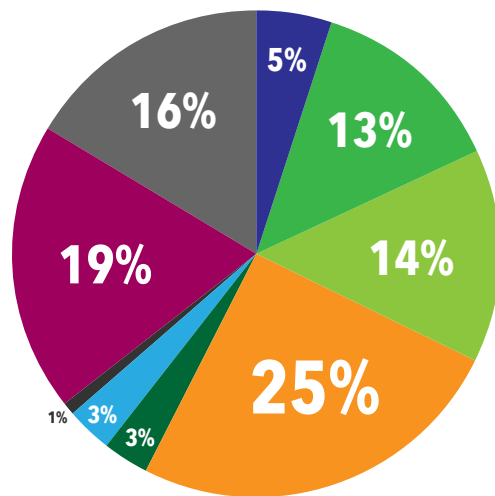
In 2018, studio partners hosted a total of 1,620 projects on their lots. Commercials led with 408 projects - 25 percent of the total - followed by Still Photography (19 percent), and the "Other" category with 253 (16 percent). The "Other" category is comprised primarily of non-filming events such as rehearsals, special events, game shows, promos, and additional mill space. Many of these events take place on a backlot, though the split between those that occur on stages is unknown. Comparing this to data in 2016, the Other category was in first place with 264 projects, followed by commercials (236).⁷

PRODUCTION TYPES

PRODUCTION TYPES	COUNT
FEATURE FILMS	88
ONE-HOUR SERIES	215
HALF-HOUR SERIES	228
COMMERCIALS	408
TALK SHOWS	51
PILOT	43
INTERNET / DIGITAL	12
STILL PHOTOGRAPHY	314
MUSIC VIDEOS	8
OTHER	253

TOTAL

1,620



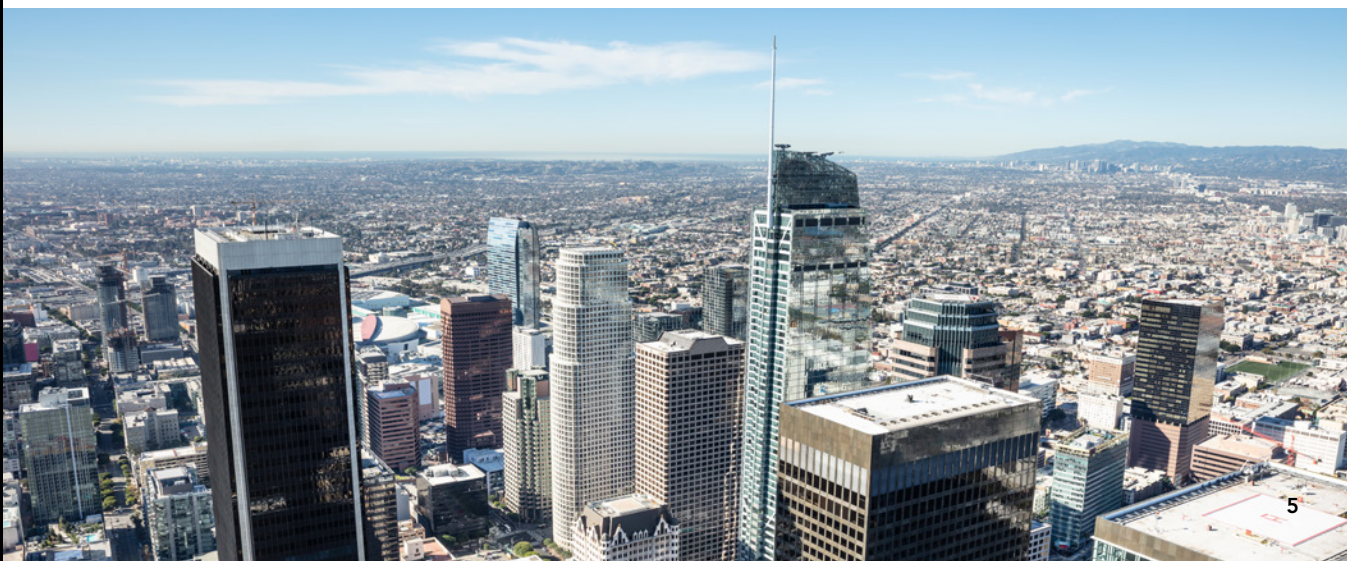
In fourth place, half-hour television series accounted for a total of 228 projects (14 percent of projects), followed very closely by one-hour series at 215 (13 percent).

All other categories of production had no more than 100 total projects. Feature films totaled 88 (compared to 81 in 2016), talk shows at 51 (versus 61), TV pilots at 43 (versus 37), Internet/digital at 12 (14 in 2016), and music videos at 8 (12 in 2016). Collectively, these five categories comprised 202 productions—12.4 percent of the total. Specific numbers from the 2016 study appear in FilmLA's previous Sound Stage Production Report.⁸

⁶ A backlot is an area or areas adjoining the main buildings and stages on a studio lot. When wholly contained on land owned by studio partners, filming on backlots does not usually require a permit.

^{7,8} FilmLA, Sound Stage Production Report, p. 8.

<https://www.filmLA.com/wp-content/uploads/2017/11/sound-stage-study-v3-WEB.pdf>



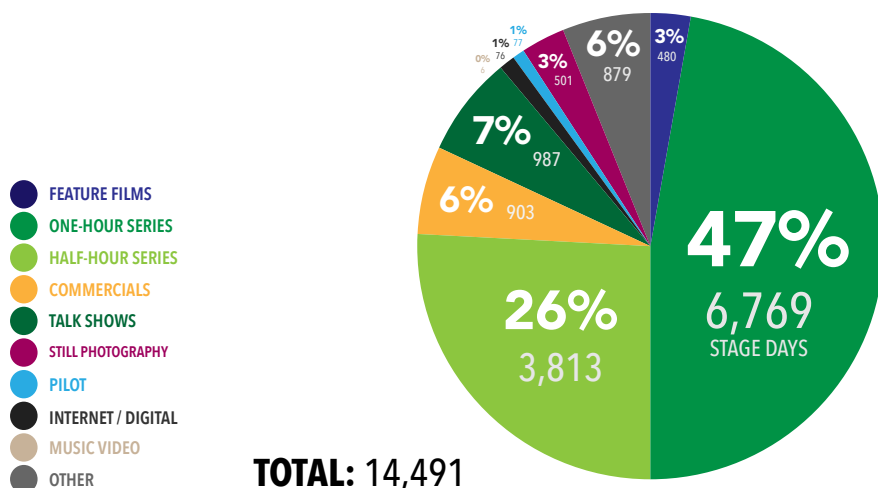
L.A. SOUND STAGE SHOOT DAYS

Studio partners reported a total of 14,491 stage shoot days in 2018. FilmLA defines a shoot day as a crew's permission to film at one or more defined locations during all or part of a given 24-hour period.

Scripted television—both one-hour (6,769 days) and half-hour series (3,813)—generated most stage days. Together, television series accounted for 73 percent of all shoot days, with one-hour series comprising 47 percent and half-hour at 26 percent, respectively. This is consistent with the previous study (76 percent of shoot days), meaning that production in Los Angeles County on the larger partner stages is being driven by episodic television.

In a distant third place were talk shows at 7 percent (987 days). This is down from 13 percent and 1,254 days in 2016.⁹ The Commercials category and Other category tied at 6 percent each - 903 and 879 days. The "Other" category consists of non-filming events that took place on a stage.

As noted, the addition of three new stages in this study, which are smaller and more heavily utilized by commercial productions, accounts for the rise in commercial shoot days from 3 percent in 2016 to 6 percent in 2018. The number of shoot days for commercial production tripled from 307 to 903.



The Miscellaneous category at 5 percent includes TV pilots (77 days), Internet/Digital productions (76 days), still photography (501 days) and music videos (6 days).

Feature films remains unchanged from the previous study at 3 percent.

In summary, television series dominate production activity at member stages, accounting for nearly three-quarters of all shoot days in 2018.

⁹ FilmLA, Sound Stage Production Report, p. 5.
<https://www.filmla.com/wp-content/uploads/2017/11/sound-stage-study-v3-WEB.pdf>

PHOTO: Melody Ranch / Shane Hirschman



L.A. BACKLOT SHOOT DAYS

A backlot is an area or areas adjoining buildings and stages on a studio lot that contain either permanent buildings, standing sets or open areas. Filming on a backlot does not usually require a permit. Six of FilmLA's 13 studio partners – 46 percent – reported having backlot space. These include Los Angeles Center Studios, Paramount Pictures Studios, Sony Pictures Studios, 20th Century Studios, Inc., Universal Studios and Warner Bros. Studios. Backlots are used for outdoor shoots, especially on those with standing sets, but can also be used for re-shoots, special events or other non-filming uses.

Backlot shoot days totaled 1,986 in 2018, which is down 11 percent from 2,241 days in 2016.

One-hour series dominated backlot shoot days (35 percent), followed by half-hour series (26 percent) and feature films (10 percent). In 2018, scripted television series accounted for 61 percent of backlot shoot days (up from 50 percent in 2016).

Backlot shoot days for feature films was up from 7 percent to 10 percent. In fact, several partners mentioned that though feature films did not use stage space, they shot on studio backlots, primarily for re-shoots and additional scenes once they returned to Los Angeles.

The Other category accounted for 9 percent compared to 18 percent two years prior. The remaining categories were Talk shows (7 percent), commercials (7 percent), pilots (4 percent), and still photography (2 percent).

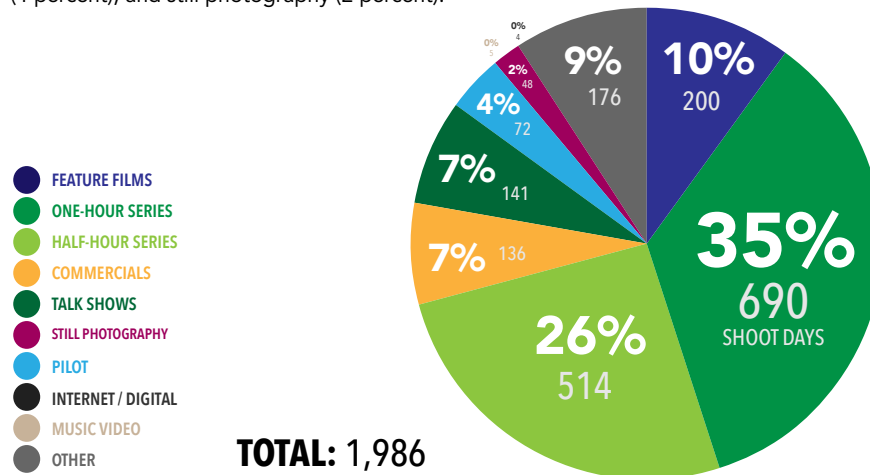


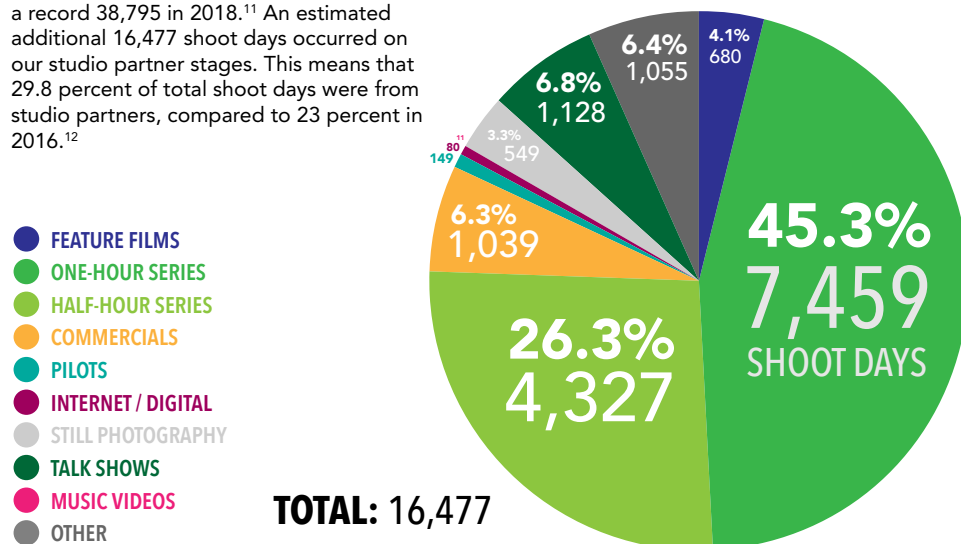
PHOTO: Idealphotographer / Shutterstock.com



COMBINED L.A. SOUND STAGE AND BACKLOT SHOOT DAYS

Combining stage and backlot shoot days, studio partners reported a total of 16,477 shoot days, up 39 percent from 2016 (11,851 days).¹⁰

On-location shoot days in Los Angeles hit a record 38,795 in 2018.¹¹ An estimated additional 16,477 shoot days occurred on our studio partner stages. This means that 29.8 percent of total shoot days were from studio partners, compared to 23 percent in 2016.¹²



In terms of numeric changes, one-hour series accounted for the largest change, increasing by 2,476 shoot days (7,459 versus 4,983). Half-hour series increased by 987 shoot days (4,327 versus 3,340). Other categories that experienced large increases include commercials, which more than doubled from 458 to 1,039 shoot days, and still photography (70 to 549 shoot days).

This data demonstrates that episodic television series production on studio partner stages, all of which are production facilities with support services in a campus-type environment, continues driving filming activity. In 2018, television series comprised 71.8 percent of total shoot day activity on stages, compared to a comparable 70.2 percent in 2016.

¹⁰ FilmLA, Sound Stage Production Report, p. 4.

¹¹ FilmLA, Los Angeles Shoot Days by Category, https://www.filmla.com/wp-content/uploads/2019/01/2018_YTD_Local_production_days_v2.pdf

¹² FilmLA, Sound Stage Production Report, p. 3.

SOUND STAGE OCCUPANCY

In the past, sound stage occupancy was determined by dividing the number of available stage days in any given quarter by the number of days the stages are booked. Studios would typically calculate only available weekdays.

The recent proliferation of television content by new television streaming services has created a subsequent lack of stage space suitable for episodic television production.¹³ This phenomenon, which began in earnest two years ago, has changed the traditional definition of “occupancy.” Many streaming companies have signed long-term leases on available stage space, but do not film on them consistently and/or use leased stages for other, non-filming purposes.

There are several other examples in our data set that, for confidentiality reasons, cannot be disclosed. Several of our stage partners have non-disclosure agreements with production companies and therefore cannot specify the split between calendar days when a stage is booked (regardless of filming) and actual stage shoot days.

“The streaming media companies along with the major networks continue to drive stage utilization for class A sound stages. With more original content blossoming, I wish we had more sound stages.”

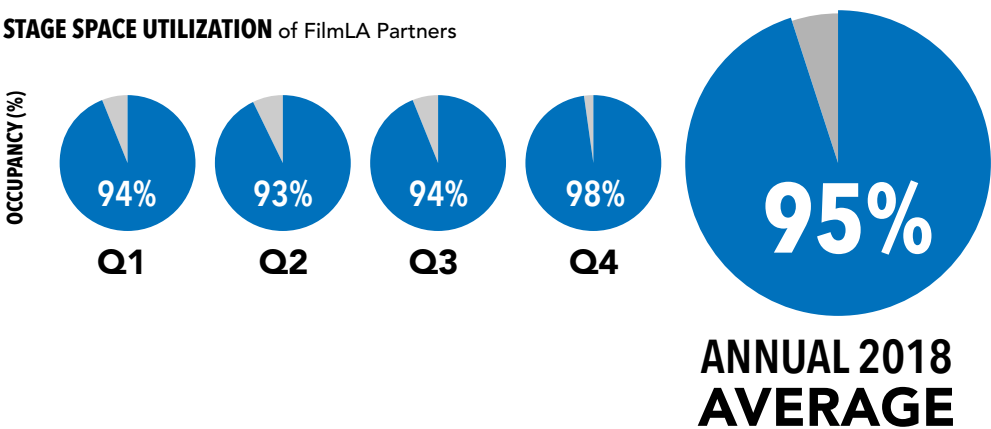
- SAM NICASSIO, LOS ANGELES CENTER STUDIOS

In 2018, studio partners reported quarterly occupancy levels ranging from 67 to 100 percent. Seven of the partners reported 100 percent occupancy across all four quarters. As noted, FilmLA could not differentiate between stages that were “booked” versus those on which actual filming took place.

On a quarterly basis, the fourth quarter had the highest occupancy at 98 percent. Both the second and first quarters tied for second place at 94 percent. The second quarter saw the lowest occupancy rate at 93 percent.

On an average annual basis, occupancy for all studio partners was an estimated 95 percent, which is comparable to what was reported in 2016 at 96 percent.

STAGE SPACE UTILIZATION of FilmLA Partners



¹³ NOTE: As a rule of thumb, television series often require several stages in excess of 15,000 square feet with on-site amenities, such as temporary office space and other services.

SOUND STAGE INFRASTRUCTURE IN THE MAJOR PRODUCTION CENTERS

Previous FilmLA reports have noted that the Los Angeles region competes with four major production centers – Canada, New York, Georgia and the UK- for U.S.-produced, English-language feature film¹⁴ and television production.¹⁵ The remainder of this report looks at the competitive position of Los Angeles County relative to those centers.¹⁶

At 5.2 million square feet of certified stage space, and an estimated one million square feet of non-certified or specialty stage space, Los Angeles is currently the world leader in stage infrastructure. That being said, there are few planned additions to supply, with the exception of the following:

- Line 204 in Sun Valley is currently ramping up construction on its approved 10-acre, 240,000-square-foot, 10-stage studio lot.
- Quixote Studios, which currently operates three studio facilities in the region, is also adaptively reusing a former warehouse in Pacoima that is expected to add 75,000 square feet of space.
- Warner Bros. recently announced they would be taking over the existing Burbank Studios lot with its existing nine sound stages and approximate 84,000 square feet stage space. The transaction is expected to take place in 2023.¹⁷

In second place, is the UK with 3.5 million. In Canada, which has the same square footage nationwide as Los Angeles County, British Columbia, follows in third place with 2.5 million square feet, followed by Ontario with 2.3 million. Rounding out these production centers are Georgia and New York, with an estimated 2.0 and 1.8 million square feet, respectively.







In deriving the square footage of stage space for these planned and proposed projects, FilmLA started with a list of sound stages listed by film commissions, and then downloaded information on stage specs from the websites of individual studios. To make the data consistent, this research excluded structures that are not dedicated film/production studios, regardless of whether they were listed in film commission directories. Therefore, non-dedicated production facilities like exhibition halls, convention centers, performing arts venues, recital halls, and former hangars would not be included.

The number of recently announced new projects and expansions in Los Angeles, British Columbia and Georgia have slowed in recent years.

However, several major projects are underway in the UK, Ontario and the New York/New Jersey area. For information pertaining to these planned and proposed studio facilities, FilmLA relied on public announcements from secondary sources such as trade journals and film commissions. Nearly all these projects have been announced since the beginning of calendar year 2019.

It is also difficult to ascertain which studios were purpose-built versus adaptive reuses of pre-existing facilities. In many cases they are a hybrid of the two. In other words, a former furniture warehouse might have been adaptively reused as a sound stage, with purpose-built stages constructed on adjacent property. FilmLA therefore focused on dedicated stage space, meaning the facility was built or adaptively reused specifically for film and television production.

The following chart summarizes stage infrastructure in the five major jurisdictions. This includes the number of production facilities, total dedicated stages, their total estimated total square footage, and the number of stages in excess of 30,000 square feet.

	 LOS ANGELES	 UNITED KINGDOM	 BRITISH COLUMBIA	 ONTARIO	 GEORGIA	 NEW YORK
NUMBER OF STAGES	384	162	95	92	107	200
STUDIO FACILITIES	52	30	25	38	21	33
STAGES > 30,000 SQ. FT.	12	32	15	18	15	-
SQUARE FOOTAGE OF EXISTING STAGES	5.2 million	3.5 million	2.5 million	2.3 million	2 million	1.8 million

14 FilmLA, Feature Films: A Profile in Production.

<https://www.filmla.com/wp-content/uploads/2020/03/Feature-Films-Profile-v2-WEB.pdf>

15 FilmLA, 2019 Television Report.

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

16 **NOTE:** It should also be noted that the State of New Mexico recently created a program that exempts a "New Mexico Film Partner" from the annual cap on the state tax credit. To be eligible, a film production company ("Partner") must either purchase a studio or execute a ten-year contract to lease a qualified production facility. To date, Netflix has purchased the existing Albuquerque Studios, and NBCUniversal is redeveloping a warehouse in downtown Albuquerque.

17 Meg James, Roger Vincent, "Warner Bros. plans to buy Burbank Studios and occupy new Frank Gehry 'iceberg' towers," *The Los Angeles Times*, April 15, 2019. <https://www.latimes.com/business/hollywood/la-fi-ct-warner-bros-burbank-studios-gehry-design-ranch-sale-20190415-story.html>

THE UK

The UK has 30 facilities, 162 stages and approximately 3.5 million square feet of stage space. Since many of these production facilities are adaptive reuses of larger-scale factories and warehouses, the UK has the highest amount of stages in excess of 30,000 square feet—a total of 32.

The largest concentration of space in the UK is in England (approximately 1.9 million square feet), where London serves as the region's major production hub. The country of Wales has approximately 775,000 square feet of stages, followed by Scotland with 415,000, and Northern Ireland with over 240,000.

The UK's two historic flagship facilities—Pinewood Studios and Pinewood Shepperton Studios—are situated outside of the London metro area and are both planning future expansions. In 2019, both Disney and Netflix signed long-term lease deals with Pinewood Studios and Pinewood Shepperton Studios, respectively, to make them their UK production hubs. Pinewood Studios recently completed two phases of expansion, and Pinewood Shepperton Studios recently received permission to build 16 more sound stages, with the first of them in operation possibly in 2021.¹⁸

A recent study identified demand for additional 1.6 to 1.9 million square feet of new studio space in the UK over the next 15 years.¹⁹ Due to increased filming, a new £500 million (US \$640 million) investment fund has been created for new studio space by two real estate developers. The project, known as the Creative District Improvement Company ("TCDI Co") plans to invest in a network of film studios and creative space across the UK, with the goal of opening one million square feet of production space by 2024.²⁰ The British Film Commission also recently announced funding of US \$6 million to encourage studio investment.²¹ These two sources of support underscore the level of public support for increased stage infrastructure.

What is striking about the UK are the number of new projects that have been announced over the past year, in addition to the fact that many of these projects are spilling over into non-traditional production areas such as Leeds, Birmingham and Liverpool that are far outside of the London Metro area.

18 Henry Chu, "Disney Inks Long-Term Deal to Occupy Most of Pinewood Studios, *Variety*, September 8, 2020.

<https://variety.com/2019/film/news/disney-long-term-deal-occupy-pinewood-studios-1203327788/>

19 Lambert, Smith Hampton, Sites, Camera, Action! (2018).

https://www.lsh.co.uk/-/media/files/lsh/research/2018/2018_06_10392_film-studios-research-report-print.ashx

20 Alex Ritman, "\$640 Million UK Studios Fund Launches, Acquires London's Twickenham Studios," *The Hollywood Reporter*. March 2, 2020.

<https://www.hollywoodreporter.com/news/uk-studios-fund-launches-acquires-londons-twickenham-studios-1282034>

21 Robert Mitchell, "British Film Commission Receives \$6 Million to Encourage Studio Investment," *Variety*. March 12, 2020.

<https://variety.com/2020/film/news/british-film-commission-receives-6-million-encourage-studio-investment-1203531812/>

PHOTO: A.A. Mariscal Troncoso / Shutterstock.com



THE UK (CONTINUED)

In recent years, numerous studio developments have been announced in the UK as follows:

- Ashford International Film Studios was announced in March 2020. The project is a US \$292 million adaptive reuse of a former locomotive plant (Newton Railway Works) on a 15-acre site. The project is a partnership between TCDI Co and property developers Quinn Estates and plans to convert 80,000 square feet of stage space.²²
- Dagenham Studios in East London is a former pharmaceutical manufacturing site. Plans have re-emerged for the 22-acre site after a U.S. developer backed out of the project last year over Brexit concerns. The planned studios will feature six sound stages covering 140,000 square feet.²³
- Blackhall Studios (Atlanta-based) announced in February 2020 a planned investment of approximately \$200 million to build 9 stages and 200,000 square feet of stage space in Reading, a city west of London.²⁴
- Comcast Sky announced in December 2019 a new 32-acre TV and film studio with 14 soundstages and approximately 240,000 square feet at Elstree, England, which is just north of London. The facility is expected to be operational in 2022.²⁵
- The developers of Edinburgh Calendon Studios in Scotland (formerly the stalled Pentland Studios project) are planning to submit the studio 'planning in detail' application this autumn.²⁶ No further details are known.
- A former Polestar Petty print works site in Leeds, England is planning four stages, totaling 70,000 square feet of space. Channel 4 is moving there, and the Leeds City Council will spend £1.6 M.²⁷
- Mercian Studios is a proposed, £100m state-of-the-art studio with 6 stages (dimensions unknown) near Birmingham, England. The complex would also have other components such as retail, residential and leisure.²⁸
- Capital & Centric struck a deal with London-based Twickenham Studios last year to run new studios The Littlewoods Building in Liverpool. The project is supported by the Liverpool City Council and Homes England.²⁹

In addition to these proposed projects, Wardpark Studios in Scotland, which is an adaptive reuse of a circuit board factory, and Belfast Harbour Studios are expanding their facilities. The latter had submitted a planning application to build six additional studios which will provide 346,000 square feet of new facilities.³⁰

Though many of these planned and proposed studios in the UK have not publicly specified the number of stages or dimensions, if all are built, an estimated total of over 1.9 million square feet would be added to existing inventory. If that is the case, the amount of stage infrastructure by square footage in the UK could be on par with Los Angeles County – increasing from 3.5 to 5.4 million.

22 Leo Barraclough, "New \$292 Million Film & TV Studios to be Built in Ashford, South-East England," *Variety*, March 22, 2020.

<https://variety.com/2020/tv/global/film-tv-studios-to-be-built-in-south-east-england-1203541825/>

23 Naman Ramachandran, "London's Dagenham Studios Project Back on Track," *Variety*, March 6, 2020.

<https://variety.com/2020/artisans/news/dagenham-studios-1203525920/>

24 Tom Grater, "U.S. Outfit Blackhall Studios Plans Major UK Film & Television Site.," *Deadline*, February 18, 2020.

<https://deadline.com/2020/02/blackhall-studios-major-uk-film-tv-site-pinewood-exec-hired-1202862250/>

25 Greg Szalai, "Comcast's Sky Developing a 14-Stage Studio Complex North of London," *The Hollywood Reporter*, December 2, 2019.

<https://www.hollywoodreporter.com/news/comcasts-sky-developing-14-stage-studio-complex-north-london-1259094>

26 Geoffrey McNab, "The lowdown on all the UK's new studio development," *Screen Daily*, September 3, 2019.

<https://www.screendaily.com/features/the-lowdown-on-all-the-uks-new-studio-developments/5142404.article>

27 Stuart Clarke, "New UK Film and TV Studio Proposed for Leeds in Northern England," *Variety*, July 17, 2019.

<https://variety.com/2019/tv/news/new-uk-film-and-tv-studio-to-open-in-leeds-england-1203269876/>

28 Matt Mueller, "The Space Race," *Screen International*, August-September 2019, p. 24.

29 CreativeBC, *Impact Report 2018/19*, p. 6.

<https://drive.google.com/file/d/1i36EIDXQZmF4yG91lkSMAJ6MAUGEiIT/view>

30 John Campbell, "Belfast Harbour film studios set for £45M expansion," *BBC News*, February 20, 2020.

<https://www.bbc.com/news/uk-northern-ireland-51507562>

BRITISH COLUMBIA

The province of British Columbia currently has a total of 2.5 million square feet of stage space,³¹ representing approximately one-half of the Canada's total stage space. FilmLA counted a total of 25 production facilities, with 95 stages.

The province, notably the Vancouver metro area, has been a production hub for U.S.-based productions for several decades, especially since the ratification of the Canada–United States Free Trade Agreement in 1988. In fact, it was one of the first jurisdictions outside the U.S. to build sound stage and studio infrastructure specifically to attract U.S.-based productions. Most of the studio space is situated in the city of Burnaby, which lies to the east of Vancouver.

The Bridge Studios (Burnaby) was the first dedicated studio to be built in the province. Following years of filming in the empty space of the former Dominion Bridge company, the government of British Columbia financed the conversion of the lot to permanent studios in 1987. The facility currently has 12 stages and approximately 161,000 square feet of dedicated studio space.

Aside from Bridge Studios, other large, dedicated studio facilities include Canadian Motion Picture Park (12 stages/approx. 240,000 sf), Vancouver Film Studios (12 stages / approximately 190,000 sf), North Shore Studios (8 stages/approx. 121,000 sf), as well as multiple studio locations throughout the province for Whites Studios and SIM Studios.

According to a recent Colliers International report, almost half of the studio space in the province consists of converted industrial space. Since a high percentage of dedicated stage space consists of former industrial space,³² the province has some of the largest stages in the world. A total of 15 stages are larger than 30,000 square feet. This includes the 124,000-square-foot stage at Mammoth Studios in Burnaby – a former retail warehouse.

Like Los Angeles, there are few planned or proposed additions to stage infrastructure. The only recently announced addition is the expansion of Martini Studios in Langley (approximately one-hour outside Vancouver). Their first adaptive-reuse facility opened in 2017 with eight stages and 150,000 square feet of space. In September 2019, the company announced a new 25-acre, 600,000-square-foot production facility in a nearby business park, at least 300,000 square feet of which will be purposed as soundstages.³³

31 CreativeBC, Impact Report 2018/19, p. 46.

<https://drive.google.com/file/d/1i36EIDXOZmF4yG91lkSMAJ6MAUGEiIT/view>

32 Colliers International, The B.C. Film Industry and Industrial Real Estate (2017).

<https://www.collierscanada.com/fr-CA/Recherche/spark-report-bc-film-industry-industrial>

33 Kenneth Chan, "Massive new 600,000 sq. ft. film studio to be built in metro Vancouver," *Daily Hive*, September 7, 2019. <https://dailyhive.com/vancouver/martini-film-studios-216th-street-langley>



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ONTARIO

The province of Ontario, like the UK, is undergoing a production infrastructure boom. Ontario currently has streaming giants like Netflix and CBS All Access that have established a long-term production base in the province. In 2019, CBS Television Studios opened a 260,000-square-foot studio in Toronto, and Netflix took over long-term leases on eight soundstages at Pinewood Toronto Studios and Cinespace Films Studios, which are the province's largest production facilities.

Following the UK, Ontario is leading the world with the highest number of planned and proposed stages. Recently announced projects in the past two years include the following:

- Whites Studio Cantay, Mississauga. Canadian production services company, William F. White International, is building four sound stages in Mississauga that are positioned to attract major Hollywood film companies and streaming giants.³⁴ The facility is the company's eighth location (six studios in Vancouver and one existing facility in Toronto) and plans to open in 2021.
- TriBro Studios, Pickering. Following its announcement in 2015 and subsequent delays, plans are underway for a large studio facility that is part of a tourism hub – Durham Live. The facility, which will be geared to tentpole productions, will feature two 70,000-square-foot sound stages, as well as a 100,000-square-foot stage and a 50,000-square-foot stage.³⁵ At the time of preparing this report, however, no further information is known.
- TriBro Studios, Ottawa. The Ottawa Film Office and studio operator, TriBro Studios, unveiled a proposal in late 2018 to build a \$40-million sound stage campus and creative hub in Ottawa – the capital of the province.³⁶
- Cinespace Film Studios/Lakeside Studios, Toronto. Cinespace Film Studios, one of the largest production facilities in Toronto, recently announced a retrofit of an old cruise ship terminal for which Netflix has signed a long-term lease on its four stages.³⁷
- Aeon Studio Group, Hamilton. This developer of film, television and digital media facilities announced in June 2019 that it plans to build a CD\$100 million production facility with 150,000 square feet of stage space within a year.³⁸ The project is slated for a 12-acre piece of city-owned land once slated for a stadium.

If all these projects are funded and completed, they would add over one million square feet to Ontario's existing stage inventory of 2.3 million.

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35 Jordan Pinto, "Triboro moving ahead with Pickering studios in Spring 2019," *Playback*, September 14, 2020. <https://playbackonline.ca/2018/09/14/triboro-moving-ahead-with-pickering-studios-in-spring-2019/>

36 Jordan Pinto, "Ottawa Film Office, Triboro unveil proposal for sound stage campus," *Playback*, September 14, 2020. <https://playbackonline.ca/2018/09/14/triboro-moving-ahead-with-pickering-studios-in-spring-2019/#ixzz6L30HvRAj>

37 Etan Vlessing, "Why Hollywood's Streaming Wars Sparked an Ontario Sound Stage Surge," *The Hollywood Reporter*, May 15, 2019. <https://www.hollywoodreporter.com/news/why-hollywood-s-streaming-wars-sparked-an-ontario-soundstage-surge-1210993>

38 "Film Studio Hub destined for the West Harbour wants cameras rolling within a year," *The Hamilton Spectator*, July 19, 2019. <https://www.thespec.com/news/hamilton-region/2019/06/19/film-studio-hub-destined-for-the-west-harbour-wants-cameras-rolling-within-the-year.html>



PHOTO: George Socka / Shutterstock.com

GEORGIA

Georgia has 21 studio facilities, 107 stages and 2.0 million square feet of space. Comparable to British Columbia, 15 of these stages contain more than 30,000 square feet. Ever since the state launched its generous film incentives program in 2008, the state has witnessed tremendous growth in studio infrastructure.

The largest facility in the state is Pinewood Atlanta, which has 18 stages and approximately 361,000 square feet of stage space. This makes it the largest facility in terms of total square footage of stages in the U.S. outside of Los Angeles. As discussed in FilmLA's Feature Film report, Georgia hosted the highest number of top-grossing movies that were released theatrically in 2018.³⁹ Many of these projects were shot at Pinewood Atlanta. The Pinewood Group recently sold its stake in the facility to its joint venture partner but plans to keep its name on the facility into 2022.⁴⁰

Another recent addition to Georgia's stage space is producer Tyler Perry's new studio on 330 acres of the former Fort McPherson site. Phase I opened last fall with 12 stages and approximately 229,000 square feet of stage space. At 330 acres, Tyler Perry Studios is larger in acreage than any of the major studios in Los Angeles. Mr. Perry purchased the land in 2015 for \$30 million and has invested a reported \$250 million in the studio.⁴¹ The facility contains 12 stages with room for expansion.

The former Tyler Perry Studios in southwest Atlanta, which originally opened in 2006, was leased to Areu Bros. Studios. This facility has five sound stages, 60 acres of land and a small backlot.

The only recently announced addition to supply in the state is the expansion of the existing Blackhall Studios. The nine stage facility, which opened in 2017, plans to expand from 210,000 to 400,000 square feet.⁴²

39 FilmLA, Feature Films: A Profile in Production, p. 15.

<https://www.filmla.com/wp-content/uploads/2020/03/Feature-Films-Profile-v2-WEB.pdf>

40 Rodney Ho, "Will Pinewood studio sale impact the future of Marvel films in Georgia?" *Atlanta Journal of Constitution*, August 21, 2019.

<https://www.ajc.com/blog/radiotv/pinewood-sale-likely-means-fewer-marvel-films-atlanta/m4E6nXzcx1pZegf1eiVyhK/>

41 AJC staff and Rodney Ho, "Things to know About Tyler Perry Studios in Atlanta," *AJC*, November 19, 2019.

<https://www.ajc.com/news/things-know-about-tyler-perry-studios-atlanta/p0Keh9FxmTRqoJTF8KkNoO/>

42 Sarah Whitten, "Ryan Millsap never intended to build Georgia's third largest studio. Now Blackhall is going global," *CNBC News*, November 9, 2019.

<https://www.cnn.com/2019/11/02/blackhall-studios-ceo-ryan-millsap-on-georgia-film-industrys-growth.html>



NEW YORK

New York has 33 studio facilities, 200 stages and approximately 1.8 million square feet of dedicated stage space. It is the only jurisdiction in the data set that lacks stages in excess of 30,000 square feet. However, among all U.S. states, New York is currently leading in the development of new facilities.

Like Los Angeles County, New York has had few recent additions to the stage supply. Steiner Studios, New York's largest and most recent studio, opened at the Brooklyn Navy Yard in 2014. The state's two other major studios—Kaufman Astoria Studios and Silvercup Studios opened in 1921 and 1983, respectively.

Kaufman is currently constructing a new, 150,000-square-foot building and adding two new sound stages.⁴³ Broadway Stages, which runs 37 stages in Brooklyn and six in Queens has acquired a former correctional facility on Staten Island. The site is currently being used for location filming and several sound stages are planned.

Over the past year, three major studio developments have been announced in the New York City metro area as follows:

- Wildflower Studios in Queens, a former Steinway & Sons storage facility, that is planning to build a 12-stage, 600,000-square-foot production studio. The estimated cost is over \$400 million. Actor, Robert De Niro, and developer, Area Commercial Real Estate Management, recently closed the purchase of a 5.3-acre lot at the site for \$72 million.⁴⁴
- Lionsgate in Yonkers is planning a \$100-million film studio in the downtown area. The approximate 109,000-square-foot facility would have five stages, 70,000 square feet of studio and 38,000 square feet of ancillary space. The Yonkers Industrial Development Agency, a public benefit corporation, has given preliminary approval of undisclosed financial incentives toward the construction of the \$60 million first phase of the project.⁴⁵ In April 2020, Lionsgate, media firm Great Point Capital Management, and real estate company National Resources also secured a \$40M loan from CIT Bank to complete the financing for the complex.⁴⁶
- Netflix in Brooklyn has established a production hub in New York and is actively retrofitting a warehouse in the Bushwick section of Brooklyn, converting it into six stages for exclusive use.
- Jersey City. Across the Hudson River in Jersey City, a New York City-based developer, Criterion Group, is using \$48.25 million in funding arranged by Columbia Pacific Advisors to complete its acquisition of two warehouse buildings, and convert them into 180,777 square feet of Class A film and television production studio space.⁴⁷ This joins the nearby 135,000-square-foot Caven Studios, which is scheduled to open this year.

In summary, a total of over one million square feet of stage space is planned or proposed for the New York MSA. This would bring its total from over 1.8 million to just under 3 million square feet of space.

43 "New York's Film Studios Are Ready for Their Closeup," *Via Commercial Observer*, November 25, 2019.

44 Maury Diduch, "Robert De Niro's Wildflower Studios Closes on \$72 M Astoria Site," *The Real Deal*, February 10, 2020.

45 "Lionsgate Incentives OK'd – Major Studio Coming to Downtown Yonkers," *Yonkers Times*, March 11, 2020.

46 Andreas Wiseman, "Lionsgate's New York Studio Complex Secures \$40M Loan from CIT Bank," *Deadline*, April 7, 2020.

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CONCLUSION

Since FilmLA's first Sound Stage Production report, sampled production studios in Los Angeles County have experienced little change in average annual occupancy levels, types of productions filming on stages, and the overall supply of stage infrastructure. Studio partners, all of whom have multi-stage facilities with on-site amenities, remain at high occupancy levels - driven primarily by episodic television series.

Perhaps most striking is the amount of stage space being built throughout the world. Approximately 500,000 square feet of stage space has been added to the Los Angeles market over the past two years. Over the same period, global jurisdictions that compete with Los Angeles—notably the UK, Ontario (Toronto) and New York—have announced significant additions to supply, which range from an estimated one to two million square feet.

A “spillover effect” is also occurring outside of the historic production centers in other parts of the world where production is booming. Most of the planned and proposed UK studio developments, for instance, are located hours outside of London in places like Leeds and Birmingham—several hundred miles away from London. The new ones in Toronto are also in places like Mississauga, Pickering and Hamilton, which are anywhere from 15 to 40 miles outside the city.

High-end television has created less risk aversion among studio developers and lenders. In contrast to the cyclical nature of “one and done” feature film productions, television productions can lease/occupy stage space for several years, oftentimes with large crews. If a studio developer has one of the streaming companies in tow, this creates even less risk since some are signing seven- or even 10-year deals. The comparative lack of future studios facilities planned in Los Angeles County does not mean that production will not occur, but it would limit the production community's ability to attract a larger percentage of future demand.

At the end of the day, for hosting jurisdictions, studio vacancy is helpful for new business attraction. During 2018, the time period covered in this report, high occupancy and low levels of sound stage construction in Los Angeles meant filmmakers had to be creative in locating their sets and projects. Although FilmLA has yet to compile the data, we expect little changed in calendar year 2019.

The COVID-19 pandemic, bringing production to a halt worldwide for time in 2020, changes the calculus entirely. Many interesting questions—perhaps answerable in a future update of this report—are before researchers and Greater Los Angeles. These questions include, but are not limited to:

- What effect will the shutdown have on long-term patterns of production?
- Will cast and crew be reluctant to travel outside Los Angeles and other production centers?
- When production resumes, will indoor spaces become more or less popular for filming?
- What effect will the shutdown have on production volume and studio vacancy rates?
- How will workplace health concerns influence future studio construction and design?





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

FilmLA.com