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FOR IMMEDIATE RELEASE

FilmLA Report Reveals Strong Demand for LA Area Sound Stages & Backlots

High Occupancy, Utilization Rates See Increased Interest in Local Development

LOS ANGELES – April 1, 2022 – Today, FilmLA issued its fourth Sound Stage Production Report, updating for the year 2020 the ongoing study of occupancy and utilization of certified sound stages in Greater Los Angeles. The time period covered by this update, marked by an unprecedented global filming shut down due to COVID-19, lends special significance to its findings. As it turns out, not even a worldwide pandemic could reduce occupancy or curtail filmmaker demand for Los Angeles area sound stages.

FilmLA's report is made possible by a unique data-sharing partnership with a select group of 13 studio partners, who by entrusting FilmLA with sensitive business information, help to bring the local production picture into clearer focus. These partners, which include the six major Hollywood studios and seven large independent operators (see attached presentation for full list), today control 3.7 million of the estimated 5.4 million square feet of certified stage space available in Los Angeles County – a total of 68 percent of the local market.

Across the properties studied by FilmLA, the average annual occupancy rate remained high at 94 percent in 2020, up from 93 percent in 2019 before the COVID-19 pandemic. While most stage operators reported to FilmLA that they had not lost a single lessee during the Q2 2020 shutdown, those that found themselves with a sudden vacancy also found it easy to attract new customers.

Other findings in the new report include an update on the number of projects shot on stages, broken down by project category, as well as counts of stage and backlot-based Shoot Days (SD)** tracked by FilmLA partners. For the first time, FilmLA's stage-based project counts include breakdowns of one-hour and half-hour television series by distribution platform.

- MORE -

Notably, just as the total number of projects shot on partner stages declined 47.0 percent year-over-year (to 898 in 2020), total stage-based Shoot Days declined 49.7 percent (to 6,191 SD) over that same period. This is also consistent with the decline in on-location production activity previously reported by FilmLA. In 2020, FilmLA reported a 48 percent decline in on-location Shoot Days (to 18,993 SD) compared to 2019 yields.

Studio partners with access to backlots saw significantly higher levels of pandemic-era use. FilmLA found that backlot-based Shoot Days reported by study partners dropped only 15 percent from 2019 to 2020. Many studio partners reported their backlots as full, owing to the preference of many production companies to shoot scenes outdoors in controlled environments whenever possible during the pandemic.

“We predicted that we would see a high level of interest in stage and backlot use on return from LA County’s 87-day pandemic production pause. But that’s not to say it was easy for our partners to say “yes” to filming,” noted FilmLA spokesperson Philip Sokoloski. “Just as we saw with on-location filming, there were new safety-related protocols to apply, parking and people logistics to master, PPE procurement challenges and new costs to absorb. What this data really highlights is the resiliency of an industry unified in its effort to get people back to work.”

Television series production, which has been driving local demand for both film permits and area stages, accounted for 72 percent of all stage and backlot-based Shoot Day activity, up from 62 percent in 2019. Along with other kinds of projects, partner studios reported a total of 307 television series filming partially or entirely on their stages in 2020. Show counts were almost evenly split, with 155 one-hour and 152 half-hour series.

Los Angeles is also maintaining a footing in a global race to build new sound stages and expand studio inventory. While tracking global stage development was outside the scope of its report, FilmLA Research is currently tracking fourteen new studio projects and/or studio expansions underway in Greater Los Angeles. This includes the current expansions at the Universal Studios lot and CBS Television City (“TVC 2050”), and the planned construction of new stages on the Warner Bros.’ Ranch.

If all of these projects are built, the count of certified stages in the region would increase by approximately 27 percent, and square footage by an unknown but considerable sum. FilmLA will report on these developments in future report installments.

Those with an interest in reading FilmLA’s full report can download it from our website. Mailing list registration is recommended to ensure access to Research Updates:

<http://www.filmla.com/our-services/research>

- MORE -

About FilmLA

FILMLA, INC® is a not-for-profit organization and the official film office of the City and County of Los Angeles, among an ever-increasing roster of local municipalities. Through expedited permit processing, comprehensive community relations, film policy analysis and other services, FilmLA works to streamline and enhance the on-location filmmaking process for communities and content creators, to ensure the Greater Los Angeles economy continues to thrive.

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

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

** Stage and backlot-based production figures are supplied by studio partners. One "Shoot Day" (or "SD") is defined as one crew's active use of a sound stage or backlot during all or part of any given 24-hour period.

- PRESENTATION ATTACHED -

SOUND STAGE PRODUCTION REPORT 2020

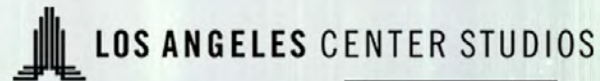
Film
LA

STAGE
4

6TH STREET

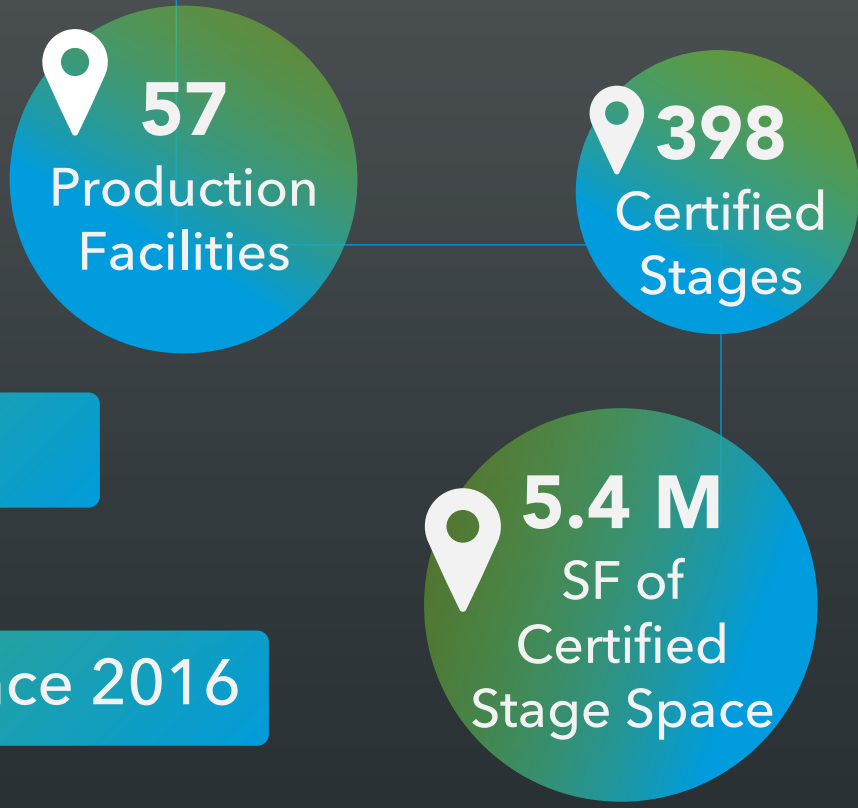
STAGE
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PARTICIPATING PARTNERS






CERTIFIED SOUND STAGE Space in Los Angeles



 One recent studio opening in 2021

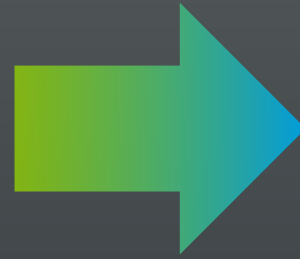
 Stable occupancy in mid-90s range since 2016

 Stage utilization on certified stages driven by TV series (est. 72%)

**A certified sound stage is a building or portion of a building usually insulated from outside noise and natural light. To obtain certification in Los Angeles, one must first obtain a certificate of occupancy or change the certificate (if an adaptive reuse) from the Los Angeles Department of Building and Safety (LADBS) and then go through a compliance process in accordance with California Fire Code Chapter 48 through the Los Angeles Fire Department (LAFD). For more information, please contact the LAFD Film Unit at lafdfilm@lacity.org or via phone at 213-978-3670.*



SOUND STAGE PARTNERS



as a Percentage of LA County Market



Certified Stage Facilities

21
FACILITIES

37%

FilmLA's 13 Partners Others



Certified Stages

256
STAGES

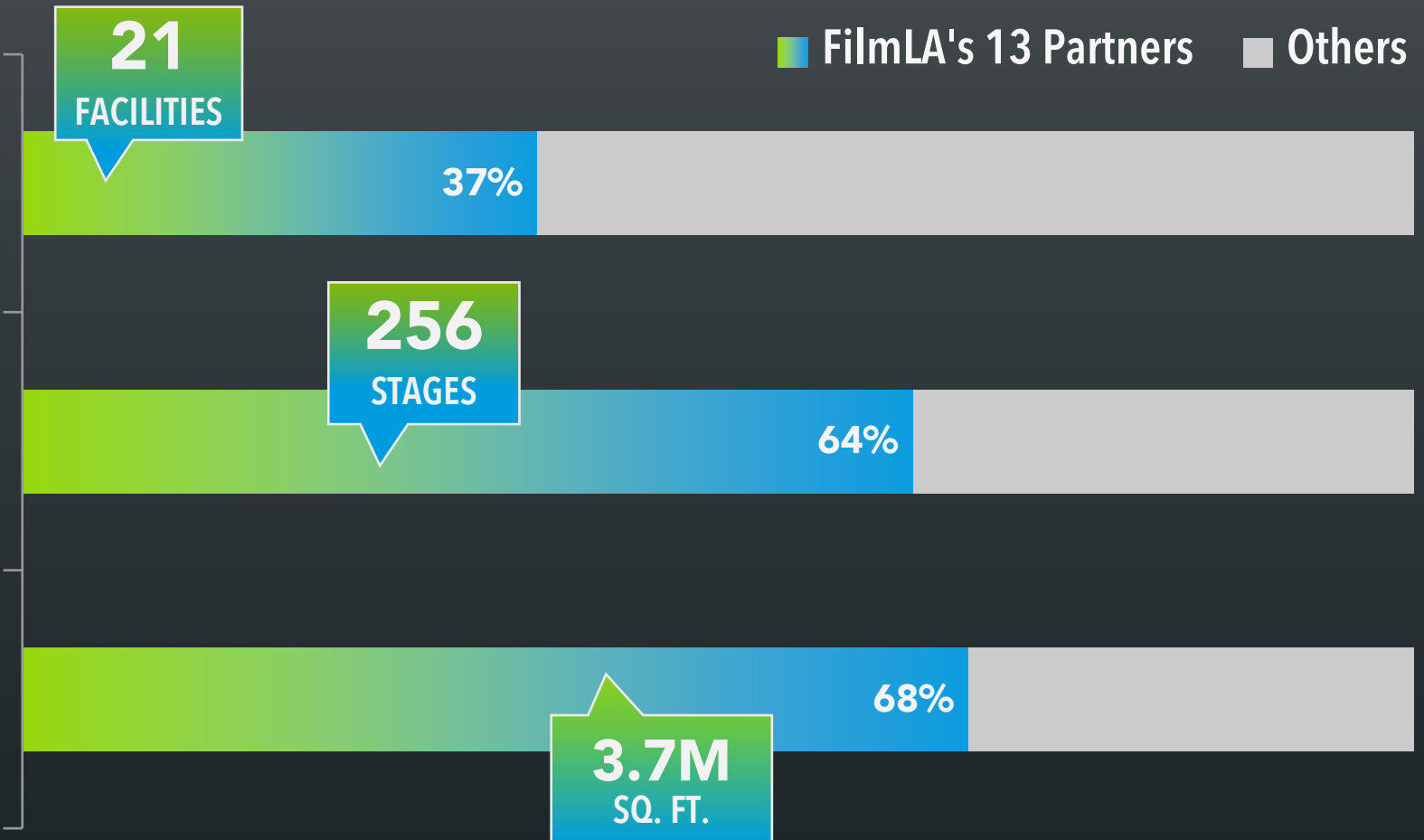
64%



Square Feet of Certified Stage Space

3.7M
SQ. FT.

68%



Number of Projects Filmed on

PARTNER STAGES 2020

Film
LA

Type of Production	Projects
Feature Films	47
One Hour Series	
<i>Streaming Series</i>	63
<i>Cable Series</i>	27
<i>Broadcast Series</i>	65
Half Hour Series	
<i>Streaming Series</i>	65
<i>Cable Series</i>	22
<i>Broadcast Series</i>	65
Commercials	255
Pilot	15
Internet	15
Still Photography	144
Talk Show	28
Music Video	7
Other	80
Total	898

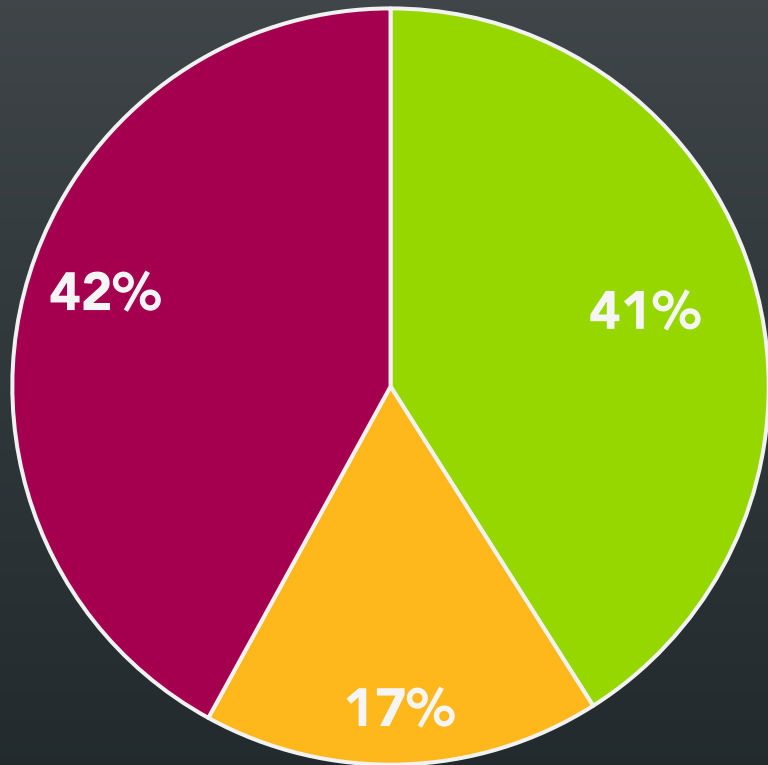
TV SERIES

ONE-HOUR TV SERIES 155 SERIES

2020

ONE-HALF HOUR TV SERIES 152 SERIES

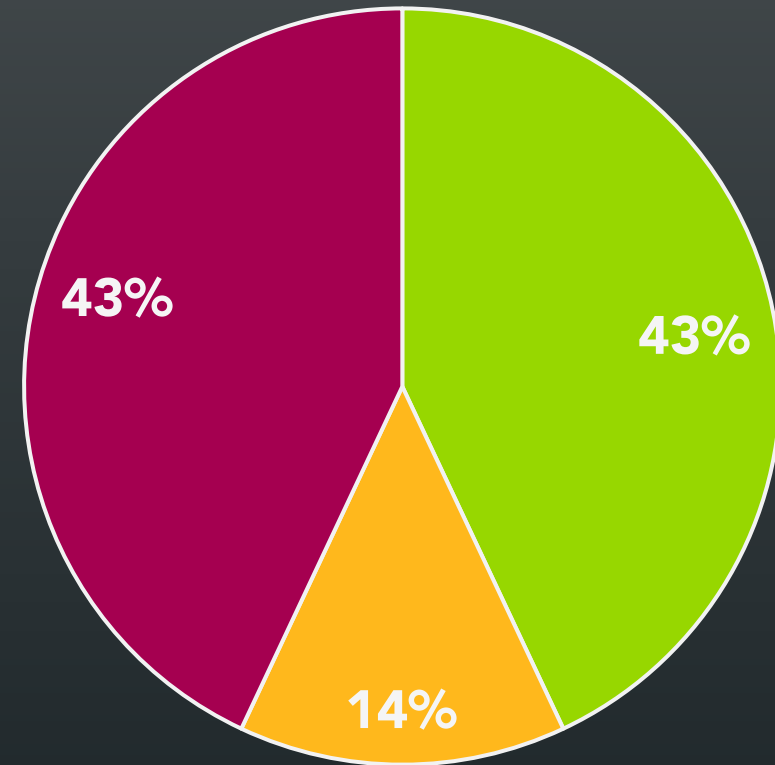
By Production Type



■ Streaming ■ Cable ■ Broadcast



By Production Type



■ Streaming ■ Cable ■ Broadcast

STAGE SHOOT DAYS

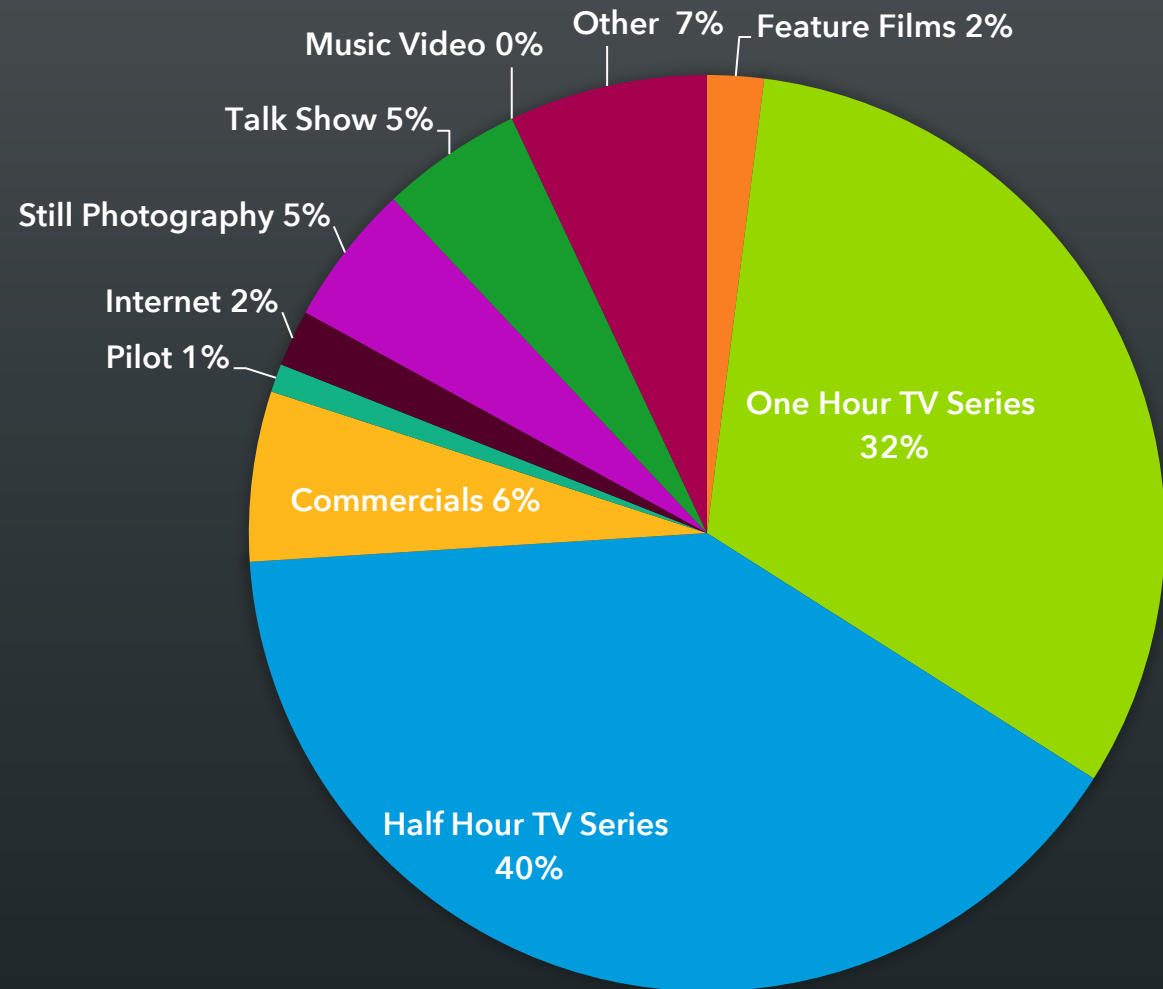


Comparative Annual Stage Shoot Days

	2020*	2019	2018
Feature Films	146	293	480
One Hour TV Series	1966	4655	6769
Half Hour TV Series	2459	3119	3813
Commercials	400	1357	903
Pilots	36	92	77
Internet	141	73	76
Still Photography	303	695	501
Talk Show	297	1249	987
Music Video	13	19	6
Other	430	756	879
Total	6191	12308	14491

*NOTE: COVID-related production shutdown between March and June

BY TYPE 2020

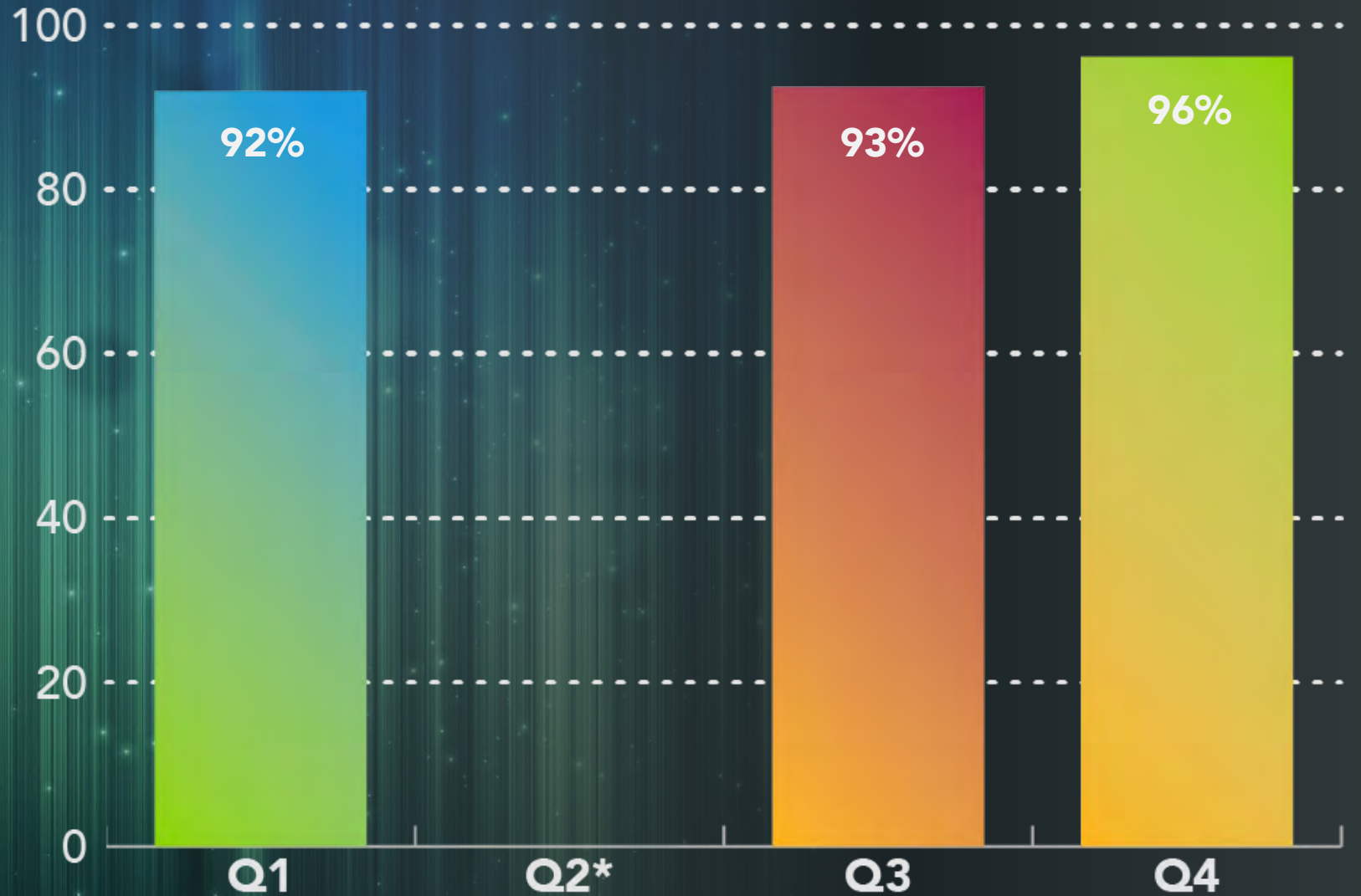


BACKLOT SHOOT DAYS

	2020*	2019	2018
Feature Films	41	93	88
One Hour TV Series	656	238	215
Half Hour TV Series	422	225	228
Commercials	81	414	408
Pilots	10	45	51
Internet	9	45	43
Still Photography	9	39	12
Talk Show	17	275	314
Music Video	7	24	8
Other	194	302	253
Total	1446	1700	1620

QUARTERLY OCCUPANCY 2020

2020
AVERAGE ANNUAL
OCCUPANCY
94%



*NOTE: Occupancy not reported in Q2 due to COVID-related production shutdown between March and June 2020

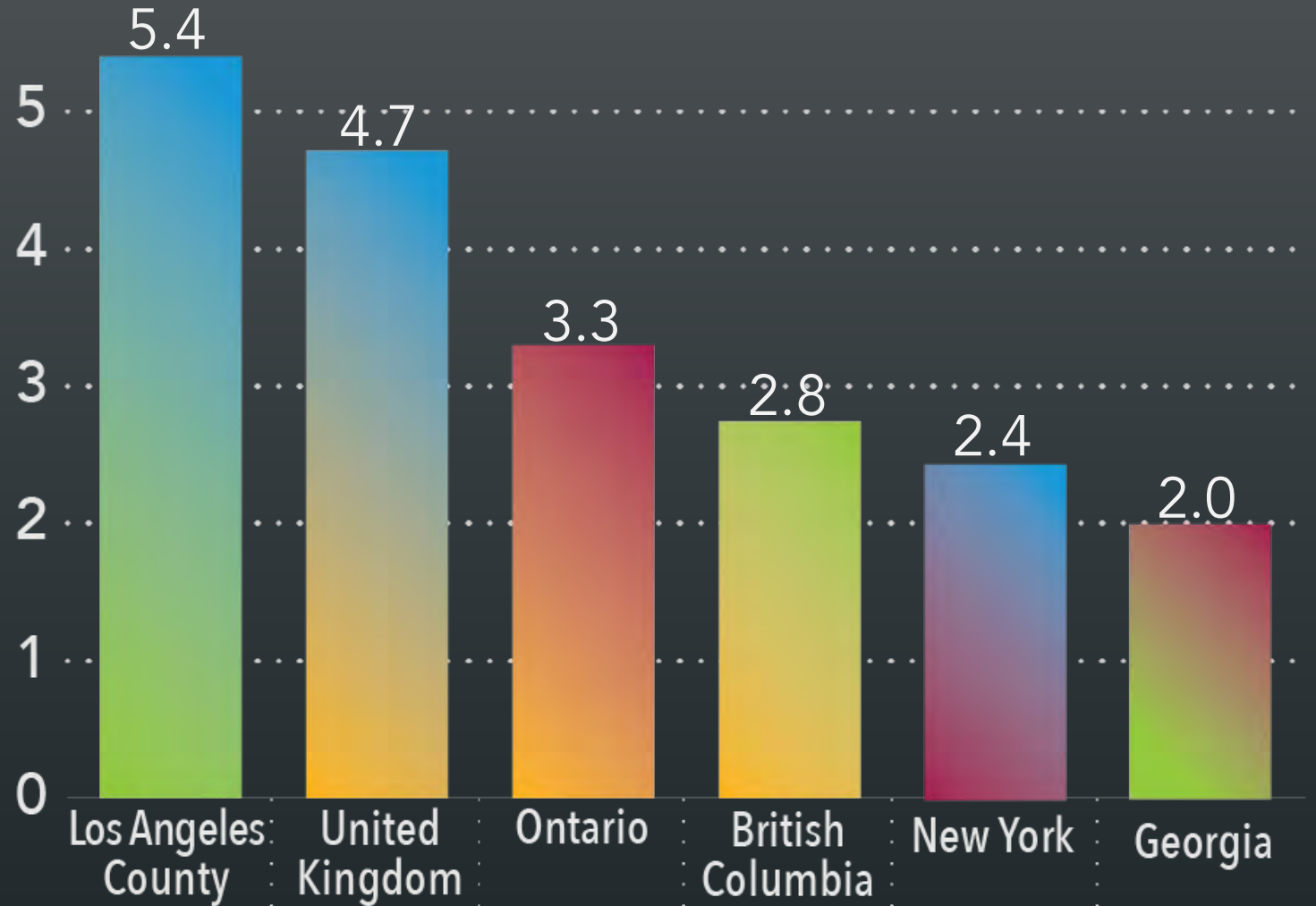


DEDICATED STAGE SPACE

By Square Footage
(in the Millions)



STAGE SPACE IN COMPETITIVE MARKETS



Data Compiled by



1

PLANNED & PROPOSED STUDIOS in LA County

STUDIO NAME

NEW STAGES | EST. SF

OPENING DATE

8th and
Alameda Studios

17 | TBD SF

Entitlement Phase

Blackhall Studios

19 | 475K SF

Entitlement Phase

Echelon Studios

5 | 91K SF

Entitlement Phase/Construction Starts 2023

Quixote Studios

5 | 98K SF

Set to Open June 2022

Sunset Glenoaks

7 | 126K SF

Under Construction/Open Q3 2023

2

PLANNED & PROPOSED STUDIOS in LA County

STUDIO NAME

NEW STAGES | EST. SF

OPENING DATE

TVC 2050

7 | TBD SF

Entitlement Phase/Construction Starts 2023

Universal Studios

8 | TBD SF

Under Construction

Warner Bros.

16 | TBD SF

Construction Starts Q3 2023

LA North (The View)

5 | 107K SF

Opening Q2 2022

LA North (The Vista)

2 | 46K SF

Opening Q2 2022



3

PLANNED & PROPOSED STUDIOS in LA County

109 STAGES
&
EST. 2.2M SQUARE FEET

STUDIO NAME

NEW STAGES | EST. SF

OPENING DATE

Reframe Studios

3 | 65K SF

Estimated Completion Mid-2023

East End Studios
(Mission Campus)

5 | 102K SF

Entitlement Phase

East End Studios
(Griffith Park Campus)

8 | 186K SF

Entitlement Phase

East End Studios
(Glendale Campus)

2 | 38K SF

Under Construction

27%

SUPPLY OF
CERTIFIED
STAGES

Film
LA

CALIFORNIA FILM & TELEVISION SOUNDSTAGE FILMING PROGRAM

Beginning January 1, 2022, and before January 1, 2032, SB 144 establishes a new credit in an amount equal to **20 percent or 25 percent for qualified expenditures** for the production of a qualified motion picture in a certified studio construction project. **A total of \$150 million is allocated for this new credit.** To receive the credit, a taxpayer would be required to construct or renovate one or more soundstages certified by the California Film Commission.

ABOUT FILMLA RESEARCH

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

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DESIGN

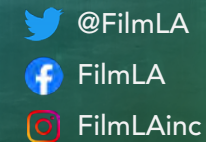
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