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EMBARGO: HOLD UNTIL 12:00 PM Pacific Time on 4/18/24

Post-Strike Production Rebound Slow to Materialize in Early 2024

LOS ANGELES – April 18, 2024 – FilmLA, partner film office for the City and County of Los Angeles and other local jurisdictions – today issued an update regarding regional filming activity.

The film industry’s highly-anticipated return to production in 2024 took eight to ten weeks to materialize, according to FilmLA. The end of labor work actions late in 2023 pushed many project starts into the New Year.

At the same time, runaway production, series cancelations and planned reductions in content spend were seen to limit industry output and work opportunities. Local on-location filming declined -8.7 percent from January through March, attaining only 6,823 Shoot Days (SD)* in the first quarter.

Reviewing the data, researchers identified a double-digit loss of Television production as the main contributor to the decline. Television production was down -16.2 percent year-over-year in the first quarter (2,402 SD in 2024 vs. 2,868 in 2023). Present filming levels look much worse over a longer study period, as Television now trails its five-year category average by -32.8 percent.**

“Since the first week of January people have called FilmLA to say, ‘I am still looking for work. The phone isn’t ringing. Is the industry back?’” said FilmLA President Paul Audley. “Unfortunately, production is still slow, and things are not as they were.”

“Many who weathered months without access to work and income had hoped filming would return quickly after the holidays,” Audley elaborated. “Production didn’t really stabilize until March, meeting our predictions while falling short of our hopes.”

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“Job seekers sometimes ask us how Shoot Days and days spent working on-location are connected to the creation of industry jobs,” Audley shared. “When we dug into the permit data and examined the self-reported number*** of cast and crew present and working on-location, we found additional evidence of the delayed return to work.”

Based on a recent *ad hoc* analysis from FilmLA Research, fewer cast and crew jobs were associated with all film permits active in January (2,282 jobs), February (3,061 jobs), and March (3,274 jobs) of 2024, compared to all permits active for those same months in 2023. The difference was most noticeable in January (-30.6 percent fewer jobs), modest in February (-5.1 percent fewer jobs), and nearly unobservable by the end of March (-0.4 percent fewer jobs).

Looking deeper into the Television category, Reality TV production dropped -18.6 percent in the first quarter (to 1,317 SD), while location-heavy TV Drama production dropped -5.5 percent (to 720 SD), and less location-heavy TV Comedy production dropped -51.5 percent (to 157 SD). TV Pilots, almost none of which were made in 2023, saw a 842.9 percent rise in quarterly production, for a yield of just 66 SD.

Projects qualifying for the California Film & Television Tax Credit Program logged 94 SD for the quarter, far less than is typical. Shows filming since January 9-1-1 Season 7 (Fox), *Bosch Legacy* Season 3 (Amazon Freevee), *Hacks* Season 3 (HBO Max), *Shrinking* Season 2 (Apple TV+), *The Lincoln Lawyer* Season 3 (Netflix), *Seal Team* Season 7 (CBS), and *The Rookie* Season 6 (ABC).

The production of Commercials for television and the web slipped in the first quarter with a -9.6 percent drop to 813 SD. Loss of production to other jurisdictions remains a concern, as local Commercial production levels trailed their first quarter five-year average by -33.1 percent. A list of recent spots lensing locally include brands like AT&T, Chase Bank, Geico and Papa John’s, plus automobile ads for Ford, Honda, Hyundai and Toyota.

Feature film production rose slightly last quarter, picking up 634 SD to finish 6.6 percent ahead of the same months in 2023. Seven feature films in production last quarter were associated with the California Film & Television Tax Credit Program, including *Atlas*, *Beverly Hills Cop 4*, *Billy Knight*, *Lurker*, *Mercy*, *Shell*, and *The Cure*. Together these projects made up 72 SD – or 11.4 percent – of the category’s quarterly yield.

FilmLA’s “Other” category, which aggregates smaller, lower-cost shoots such as Still Photography, Student Films, Documentaries, Music and Industrial Videos and other projects, declined -4.5 percent (to 2,974 SD) for the quarter.

About FilmLA

FILML.A., 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. Learn more about FilmLA at www.filmla.com.

Notes on This Report

* On-location production figures are based on days of permitted production within the jurisdictions served by FilmLA. One “Shoot Day” (or “SD”) is defined as one crew’s permission to film at one or more defined locations during all or part of any given 24-hour period.

** FilmLA’s reported five-year average excludes 2020, which due to the significant impact of COVID-19 on production that year, distorts all historical comparisons.

*** Permit applicants served by FilmLA declare the number of production cast and crew who will be physically present on-location during filming. This customer-supplied headcount is not independently verified by FilmLA and is an incomplete measure of total production employment.

- CHARTS ATTACHED -



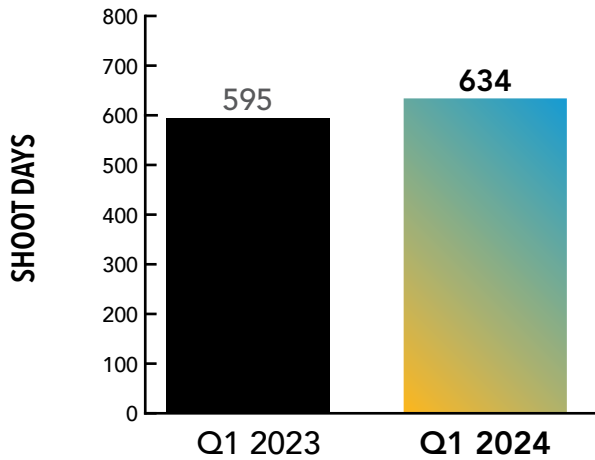
LOS ANGELES SHOOT DAYS* - BY CATEGORY

Calendar Years 2023 – 2024, First Quarter

Feature Films

Vs. Q1 2023: +6.6%

Vs. 5 Year Average*: -3.5%

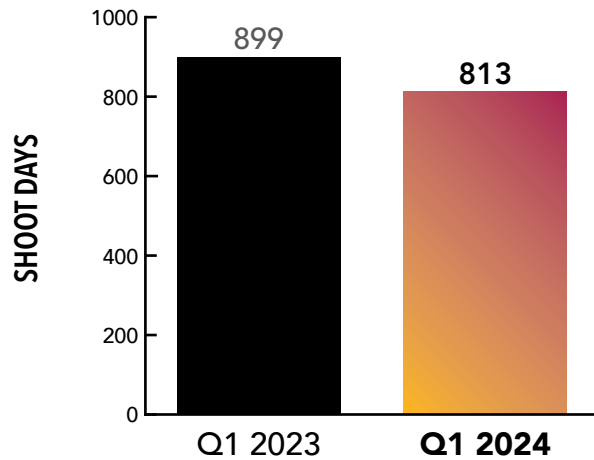


72 incentivized Q1 shoot days
11.4% of Feature Film category

Commercials

Vs. Q1 2023: -9.6%

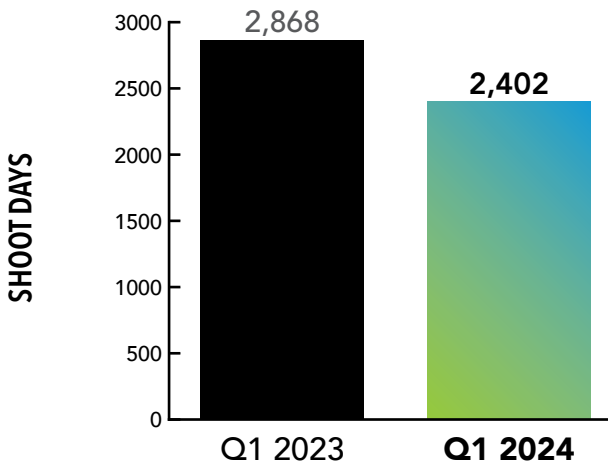
Vs. 5 Year Average*: -33.1%



Television

Vs. Q1 2023: -16.2%

Vs. 5 Year Average*: -32.8%

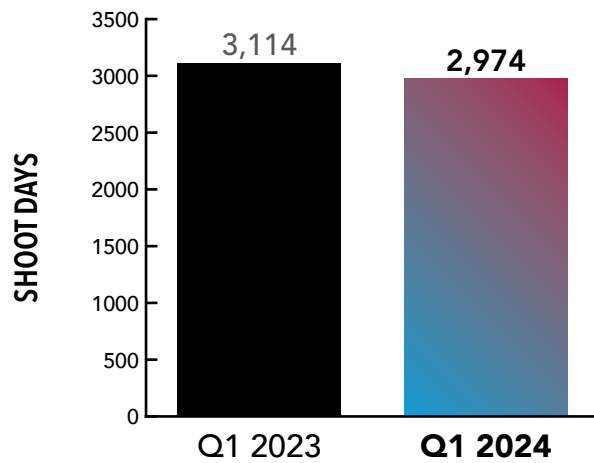


94 incentivized Q1 shoot days
3.9% of Television category

Other

Vs. Q1 2023: -4.5%

Vs. 5 Year Average*: -4.4%



* On-location production figures are based on days of permitted production within the jurisdictions served by FilmLA. One "Shoot Day" (or "SD") is defined as one crew's permission to film at one or more defined locations during all or part of any given 24 hour period. This measure determines how many days of work film crews perform during a given time period. FilmLA data does not include production that occurs on certified sound stages or on-location in jurisdictions not served by FilmLA.

* NOTE: Five year averages exclude year 2020 when production was suspended in Los Angeles County between mid-March through mid-June 2020 due to COVID-19

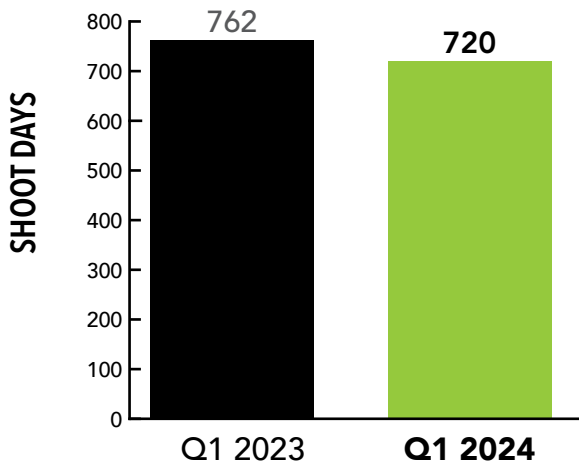
LOS ANGELES SHOOT DAYS* - BY TELEVISION SUB-CATEGORY

Calendar Years 2023 – 2024, First Quarter

TV Drama

Vs. Q1 : -5.5%

Vs. 5 Year Average*: -38.4%

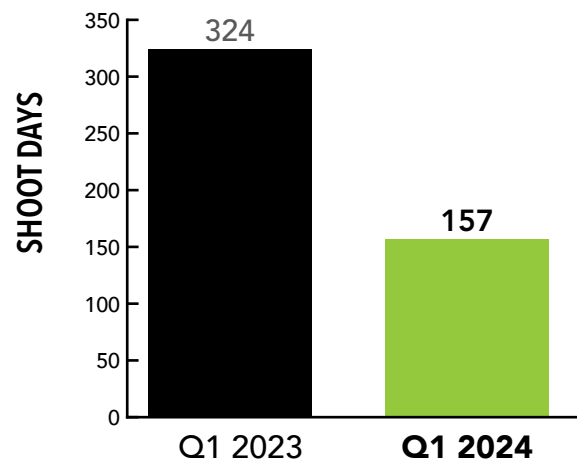


94 incentivized Q1 shoot days
13.1% of TV Drama category

TV Comedy

Vs. Q1 2023: -51.5%

Vs. 5 Year Average*: -56.3%

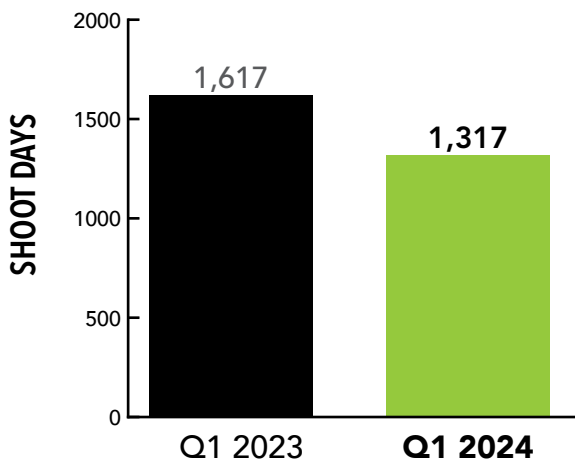


0 incentivized Q1 shoot days
0% of TV Comedy category

TV Reality

Vs. Q1 2023: -18.6%

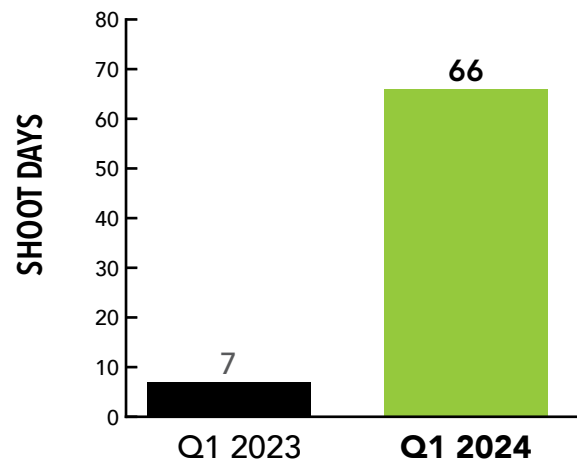
Vs. 5 Year Average*: -10.3%



TV Pilot

Vs. Q1 2023: +842.9%

Vs. 5 Year Average*: -39.3%



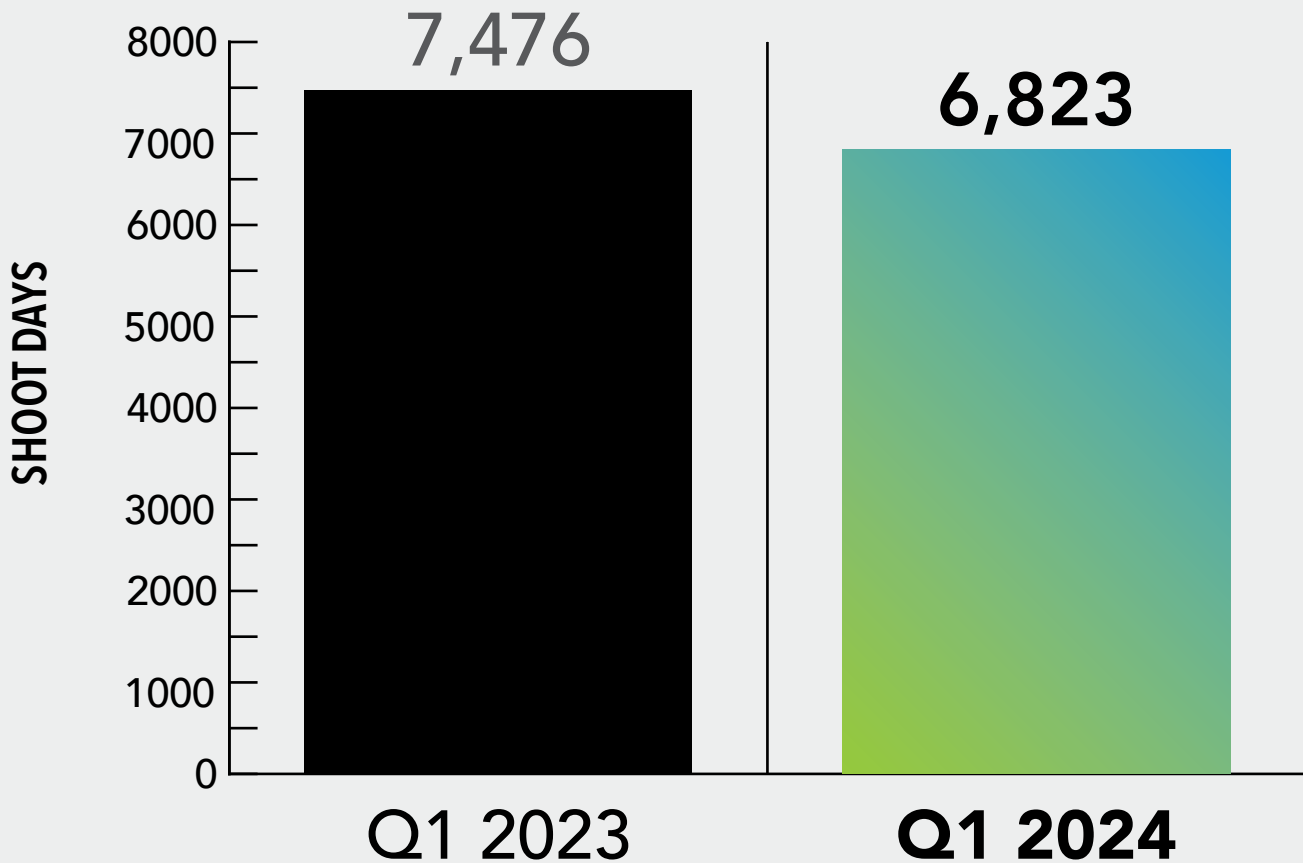
* NOTE: Five year averages exclude year 2020 when production was suspended in Los Angeles County between mid-March through mid-June 2020 due to COVID-19

2023 - 2024 LOS ANGELES SHOOT DAYS

Q1 TOTAL

Vs. Q1 2023: **-8.7%**

Vs. 5 Year Average*: **-20.5%**



** NOTE: Five year averages exclude year 2020 when production was suspended in Los Angeles County between mid-March through mid-June 2020 due to COVID-19*

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