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FOR IMMEDIATE RELEASE

FilmLA Updates On-Location, Stage-Based Production Data Series

Reality TV Losses Lead Filming Levels Lower Last Quarter

LOS ANGELES – July 17, 2024 – FilmLA, partner film office for the City and County of Los Angeles and other local jurisdictions – today issued a pair of updates regarding regional film production activity. The first of these reports examines on-location filming in the second calendar quarter of 2024. The second report examines stage-based production during the first half of calendar year 2023.

On-Location Production Report: Seasonal Analysis

Local on-location filming declined -12.4 percent year-over-year from April through June, attaining 5,749 Shoot Days (SD)* in the second quarter of 2024. Observed dips in Feature Film production (down -3.3 percent to 704 SD) and Commercial production (down -5.1 percent to 817 SD) both looked minor when compared to a steep plunge in unscripted television production.

Filming of Reality TV fell -56.9 percent to 868 SD, taking the broader Television category (down -27.7 percent to 1,901 SD) lower with it.

Elsewhere within the Television category, scripted content production increased substantially for the period, compared to the earliest strike-affected months of 2023. TV Drama production rose 98.3 percent to 714 SD, and TV Comedy production rose 103.6 percent to 171 SD, while filming for TV Pilots rose 54.5 percent to 17 SD.

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“Generally speaking, unscripted television is a location-heavy format that generates significant permit volume,” said FilmLA’s VP of Integrated Communications Philip

Sokoloski. “The employment impact of reality production is lower than it is for scripted TV, and projects are not incentive-eligible through the State of California. It remains an important part of LA’s production economy.”

Reality TV series that filmed locally last quarter included *Accident, Suicide or Murder* (Oxygen), *American Idol* (ABC), *John Mulaney Presents: Everybody’s in LA* (Netflix), *90 Day Finance* (TLC), *The Golden Bachelorette* (ABC), *The Real Housewives of Beverly Hills* (Bravo) and *Selling Sunset* (Netflix).

Most Feature projects filmed in the region last quarter were independent films. Two films, *Dreamquill* and *Lurker*, were produced with support from the California Film & Television Tax Credit Program. Other independent films in production included *Nickels*, *The Prince*, and *Watch What You’re Doing*. Two streaming companies filmed feature projects on-location, including *Bubbi* (Apple Studios) and *Mercy* (Amazon), the latter in connection with the California state film incentive.

Television shows that filmed on-location in Los Angeles last quarter included incentive enrolled projects *Forever S1* (Netflix), *High Potential S1* (ABC), *Matlock S1* (CBS), *Orphan S1* (ABC), *Paradise City S1* (Hulu), *S.W.A.T. S7* (CBS), and *The Rookie S7* (CBS). Also filming were *Bookie S2* (HBO Max), *Bosch Legacy S3* (Freevee), *Shrinking S2* (Apple TV+), *9-1-1 S7* (Fox), and *Suits: LA S1* (NBC).

Commercial productions are not incentive eligible in California, and have become attractive targets for other film jurisdictions. In Greater Los Angeles, many car companies such as Ford, Honda, Lexus, Mazda, Nissan, Subaru and Toyota all shot commercials in the second quarter, along with spots for major brands Google, Lululemon, Sam’s Club, Spectrum, Starbucks, Verizon and Walmart.

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 -0.9 percent (to 2,327 SD) for the quarter.

On-Location Production Report: Historical Analysis

The WGA and SAG-AFTRA labor actions reduced industry output in 2023, but a sustained pattern of production decline had been evident before the strikes began.

The chart from FilmLA Research on page three of today’s report illuminates the slide, which has unfolded over time and affects all top production categories. As revealed on page four, on a rolling five-year basis**, overall on-location filming levels heading into summer are down -33.4 percent below their five-year seasonal average.

“Streaming content spend is down, and Los Angeles and its many global competitors are still reeling from post-strike paralysis,” said FilmLA’s Philip Sokoloski. “Workers in this industry, wherever they are based, are seeing fewer opportunities amid ongoing labor negotiations in an era of content contraction.”

FilmLA analysts point out that for the studios that produce, purchase and distribute entertainment content, investor emphasis on financial austerity/profitability over new subscriber growth, plus a wave of corporate consolidation, continues to limit new content investment.

“Given that there was a double strike in effect in late 2023, it’s likely the rest of this year will look better -- on paper,” Sokoloski noted. “An authentic production lift is also possible, pending successful contract negotiations. If we see new content investment, it will be cautious and measured, and the gains will be globally distributed.”

Sound Stage Production Report: January-June, 2023

Today FilmLA also updated its regional survey of sound stage occupancy and certified studio-based production. The newly released data covers the first half of 2023 and the closely-watched period leading up to the WGA / SAG-AFTRA work actions.

Uncertainty about the outcome of industry contract talks saw occupancy levels drop substantially last year, dipping to as low as 74 percent by the second quarter. This is the lowest reported occupancy level observed by FilmLA since formal study of this sector began in 2016.

Approximately 706 projects filmed on stages during the study period, and among them the overall proportions of feature film, television, and commercial projects did not change much from prior periods.

Non-film use of stage properties increased in early 2023, to about 17 percent of total activity. Resilient in the face of reduced filmmaker demand, stage operators welcomed novel non-film uses of unused stage properties in early 2023 and into the latter half of the year.

“Study participants reported that use of sound stages and backlots was something event producers, marketing agencies and other parties often pursue, but in recent years many of these inquiries had to be turned away, due to lack of space,” Sokoloski observed.

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Today’s update is the second sound stage report FilmLA Research has published in 2024. Two more updates are planned by this fall.

After that, and in order to meet research participants' need for more real-time insight into occupancy and use of Los Angeles area sound stages, FilmLA will move to publish these updates on a six-month basis, every March and September, beginning in 2025.

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. 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.

- TWO REPORTS ATTACHED: 7 Pages Total -



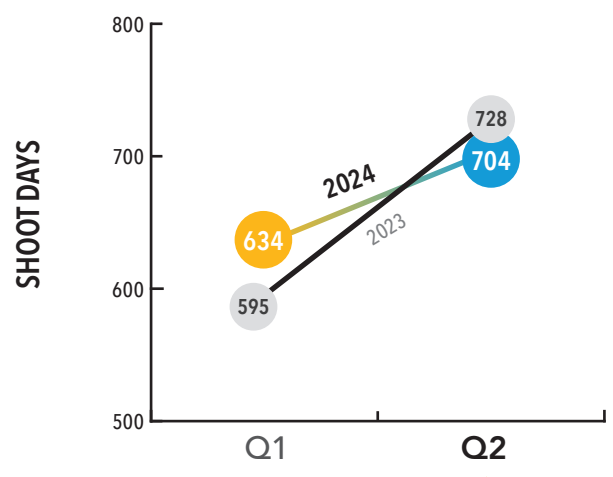
LOS ANGELES SHOOT DAYS* - BY CATEGORY

Calendar Years 2023 – 2024, Second Quarter

Feature Films

Vs. Q2 2023: -3.3%

Vs. 5 Year Average*: -23.8%

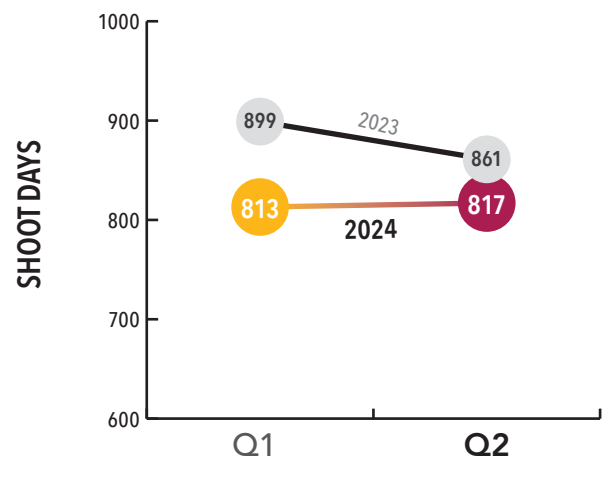


116 incentivized Q2 shoot days
16.5% of Feature Film category

Commercials

Vs. Q2 2023: -5.1%

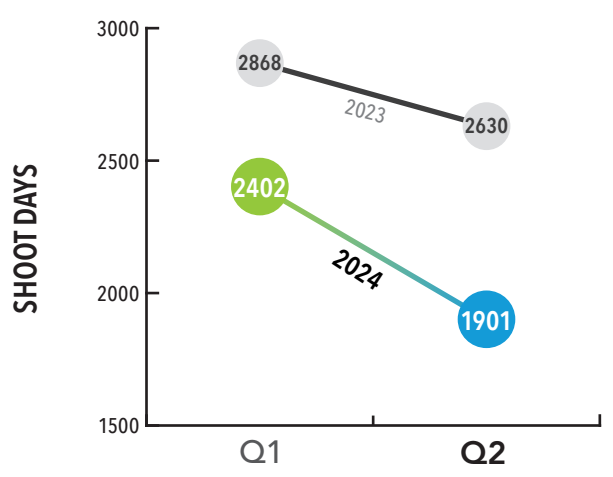
Vs. 5 Year Average*: -36.1%



Television

Vs. Q2 2023: -27.7%

Vs. 5 Year Average*: -45.8%

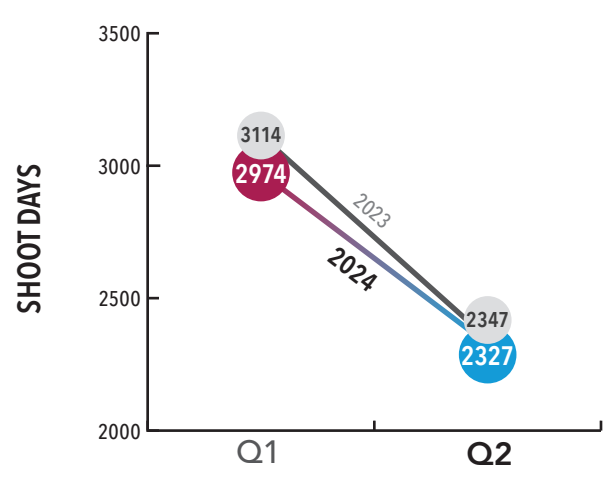


122 incentivized Q2 shoot days
6.4% of Television category

Other

Vs. Q2 2023: -0.9%

Vs. 5 Year Average*: -20.4%



* 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

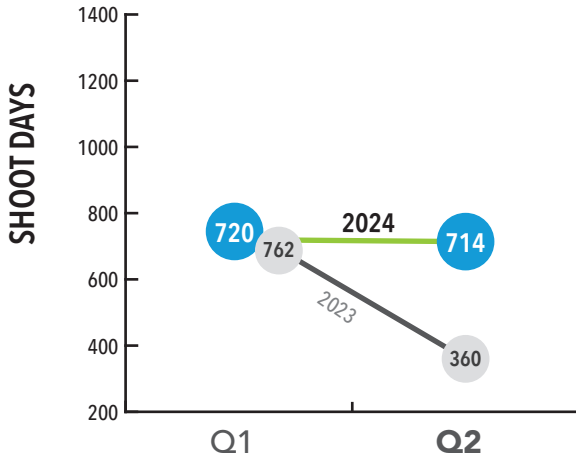
LOS ANGELES SHOOT DAYS* - BY TELEVISION SUB-CATEGORY

Calendar Years 2023 – 2024, Second Quarter

TV Drama

Vs. Q2 : **+98.3%**

Vs. 5 Year Average*: **-19.2%**

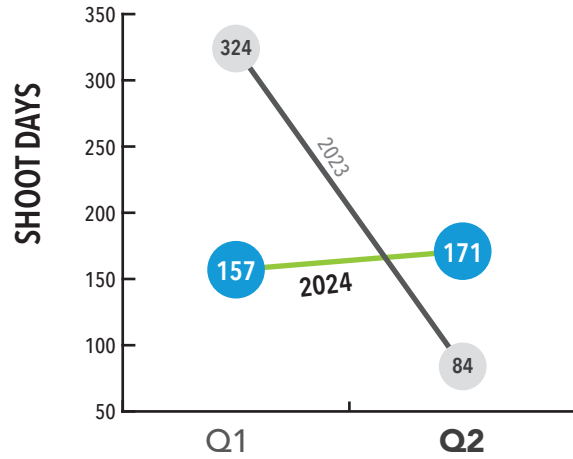


121 incentivized Q2 shoot days
16.9% of TV Drama category

TV Comedy

Vs. Q2 2023: **+103.6%**

Vs. 5 Year Average*: **-44.4%**

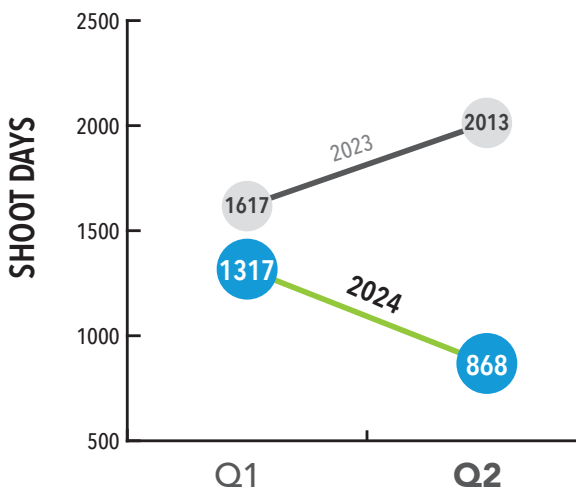


1 incentivized Q2 shoot days
0.6% of TV Comedy category

TV Reality

Vs. Q2 2023: **-56.9%**

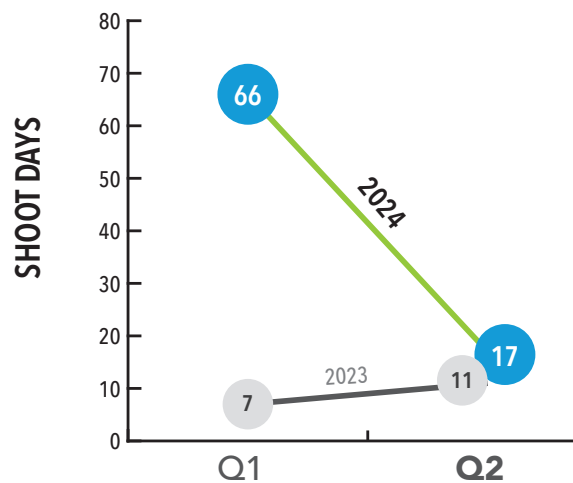
Vs. 5 Year Average*: **-50%**



TV Pilot

Vs. Q2 2023: **+54.5%**

Vs. 5 Year Average*: **-72.5%**

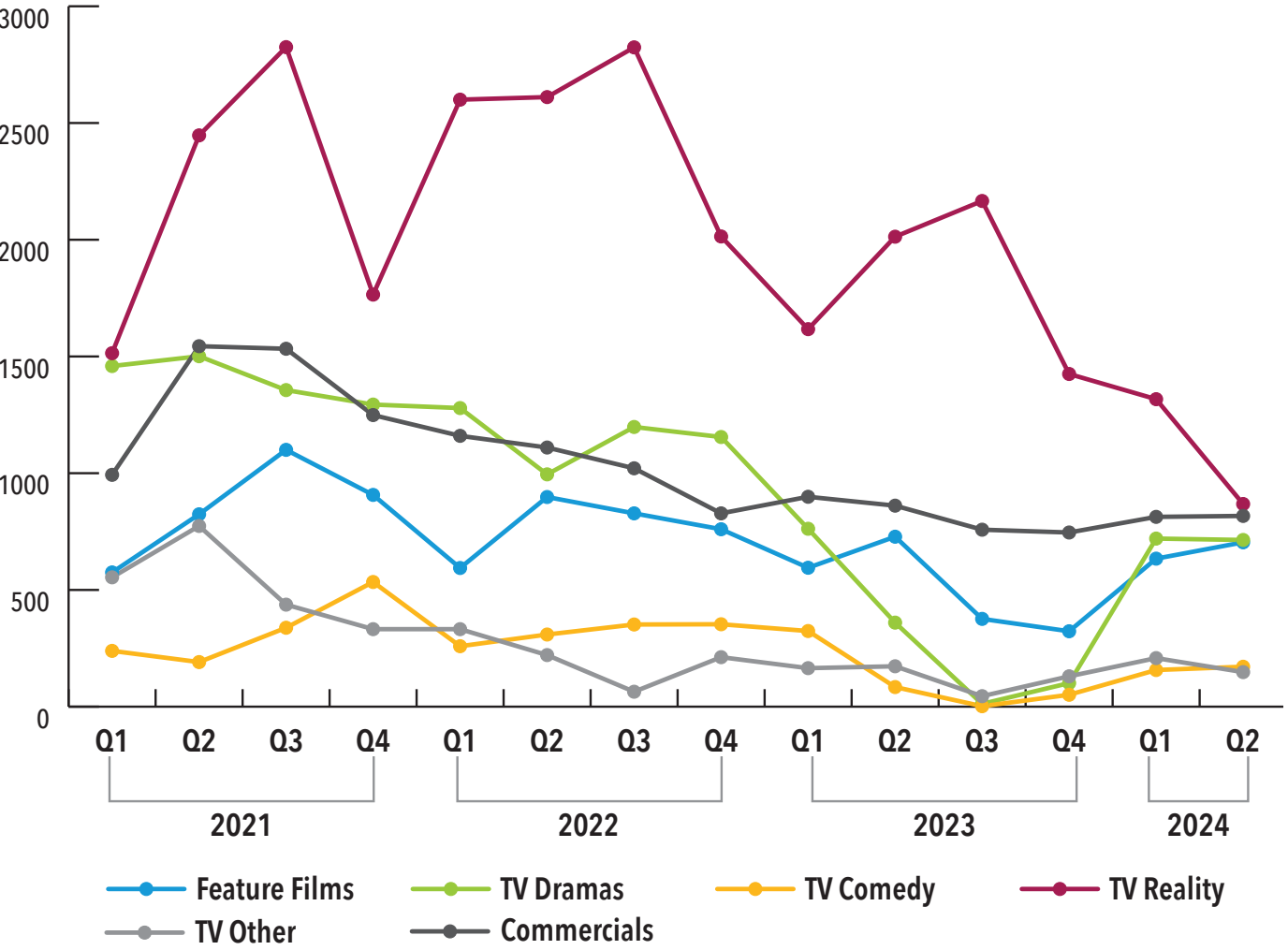


* NOTE: Five year averages exclude year 2020 when production was suspended in Los Angeles County between mid-March through mid-June 2020 due to COVID-19

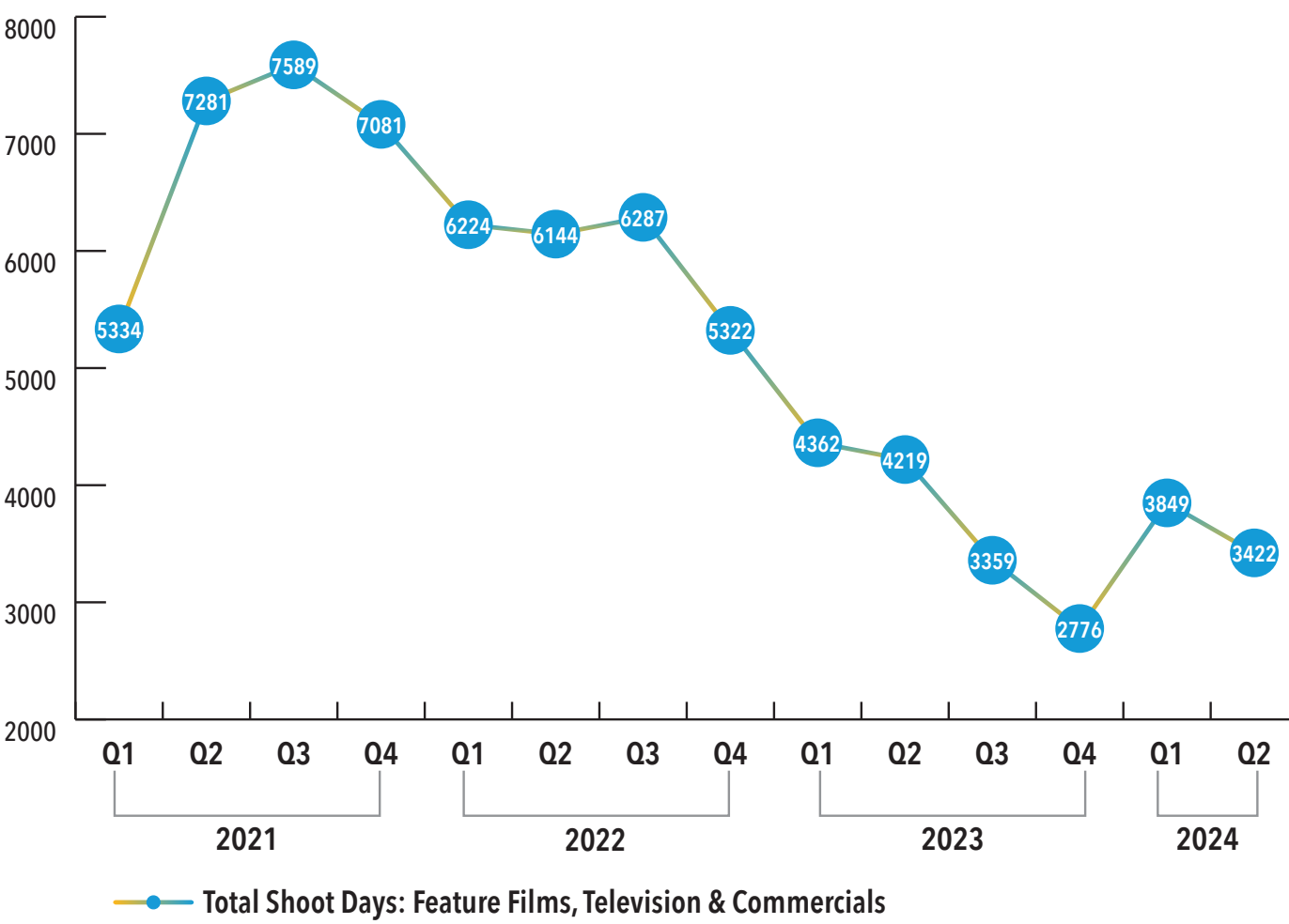
LOS ANGELES SHOOT DAYS* - 2021 TO 2024 YEAR-TO-DATE



Shoot Days by Category



Aggregate Shoot Days



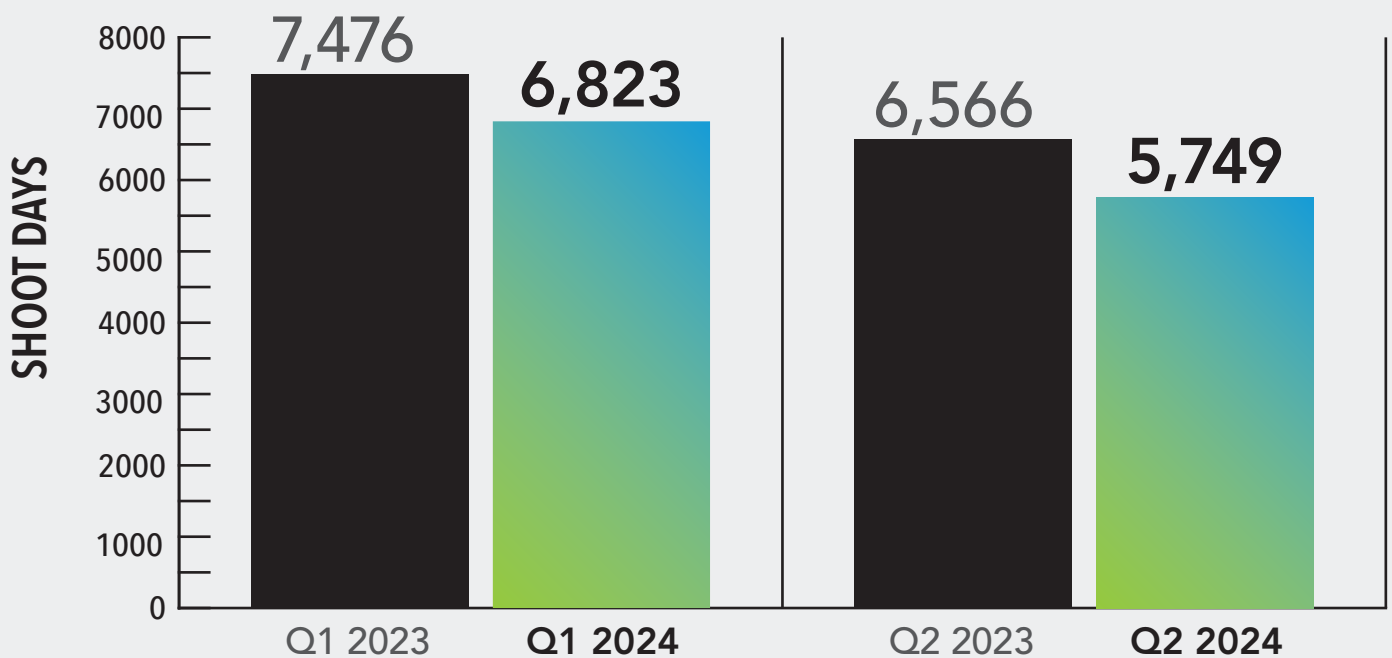
	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024
Feature Films	575	824	1100	907	594	898	828	760	595	728	376	323	634	704
TV Dramas	1459	1501	1356	1294	1279	995	1198	1155	762	360	12	101	720	714
TV Comedy	239	191	338	534	259	309	352	353	324	84	2	51	157	171
TV Reality	1514	2447	2825	1765	2600	2611	2824	2014	1617	2013	2166	1425	1317	868
TV Other	554	774	437	332	332	221	64	212	165	173	45	130	208	148
Commercials	993	1544	1533	1249	1160	1110	1021	828	899	861	758	746	813	817
TOTAL	5334	7281	7589	7081	6224	6144	6287	5322	4362	4219	3359	2776	3849	3422

2023 - 2024 LOS ANGELES SHOOT DAYS

Q2 TOTAL

Vs. Q2 2023: **-12.4%**

Vs. 5 Year Average*: **-33.4%**



* 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

About FilmLA

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