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FOR IMMEDIATE RELEASE

FilmLA Scripted Content Study Spotlights Losses for Los Angeles

Risks to California Economy Seen in Production Share Decline

LOS ANGELES – October 9, 2024 – FilmLA, partner film office for the City and County of Los Angeles and other local jurisdictions – today updated its three-year analysis of U.S.-produced, first-run, English-language scripted projects.

As presented in *FilmLA's 2023 Scripted Content Study,* Greater Los Angeles recently endured significant loss within the economically critical entertainment production sector. The region's capture of the most economically valuable forms of television and feature film production declined by 19.7 percent to just 183 projects last year. This is 45 fewer projects than Greater Los Angeles captured the year prior, and only a fraction of the 990 total projects captured by all jurisdictions in 2023.

Over the past three years, California's signature industry has lost market share to its array of U.S. and global competitors, including the United Kingdom, Ontario, New York, Georgia and others. Greater Los Angeles went from a nearly 23 percent capture of qualified projects in 2021, to a 22 percent share in 2022, and 18 percent share in 2023.

Put another way, last year viewing audiences enjoyed 31 fewer TV series, seven (7) fewer TV movies, two (2) fewer theatrical films, and five (5) fewer streaming movies that were made in Los Angeles by working Californians.

"The entertainment industry feeds around \$43 billion in wages into the state economy," observed FilmLA President Paul Audley. "But how long can California subsist – or help businesses and families thrive -- on an ever-thinner slice of a shrinking production pie?"

Audley and others worry that California's loss of global production share risks more than international bragging rights. Hollywood's coveted leadership in entertainment production was achieved over a century of new business investment.

Over the last 30 years, competing jurisdictions have applied direct financial incentives and infrastructure investments to win attention from film producers and build stable film economies. As indicated in FilmLA's study, rival jurisdictions now capture four out of every five film and television projects and their associated jobs.

According to the 2024 Otis College Report on the Creative Economy, 27 percent of the nation's domestic film and television workforce resides in Greater Los Angeles. Given these workers' heavy dependence on local filmmaking, reduced project output raises significant concerns.

"We're now at a place where inadequate investment in this industry places other economic supports at risk," Audley observed. "For each film industry supplier that closes his or her doors due to lack of steady work – those entrepreneurs no longer employ people, generate sales taxes or pay rent. Their former employees, lacking an income, then have no money for groceries, tuition and bills. When local industries decline the effects can be far ranging, so this is definitely a problem California needs to address."

"FilmLA's latest 2023 Scripted Content Study underscores the challenges facing our entertainment industry, not just in Los Angeles County but elsewhere in the nation and globe. These last two years have been devastating to all the workers and businesses in the County due to the labor strikes of 2023, advancing and ever-changing technology, recovery from the Pandemic, and other factors," said Kelly LoBianco, Director of the Department of Economic Opportunity. "Now more than ever, the County Film Office and the Department of Economic Opportunity is committed to implementing efforts to support, retain, and attract productions by continuing to streamline its permitting process, reduce regulations, and craft new innovative ways to locally incentivize those productions."

"This report validates the lived experience of grips, camera operators, caterers, and various essential small business owners over the last two years," said Lindsey P. Horvath, Chair of the Los Angeles County Board of Supervisors. "Our community members' livelihoods are on the line, which is why Los Angeles County launched the Entertainment Business Interruption Fund, and we continue to explore ways to incentivize local production. FilmLA's report underscores the urgent work required to save an industry critical to our local economy and identity as Angelenos."

"Today, Greater Los Angeles is one place among many where film, television and commercial projects are made," Audley observed. "More support for California's film industry, including a vast expansion of the California Film & Television Tax Credit Program, is required in order to increase the rate of industry investment in our state."

FilmLA's report includes an Executive Summary comparing the overall rates of project capture globally and for Los Angeles. Genre specific breakdowns follow, focused on television and feature content by exhibition method, with the top ten most prolific jurisdictions presented for each.

The impact of the California Film & Television Tax Credit Program is highlighted in the report and across several pages of Appendices. A detailed discussion of FilmLA's methodology, types of projects excluded, definitions and research sources is also included.

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.

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SCRIPTED CONTENT STUDY



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FILMLA IS PLEASED TO PRESENT its second annual *Scripted Content Study*, which analyzes the filming locations used for scripted, U.S.-produced, first-run, English-language film and television projects distributed and/or released in 2023.

This report quantifies and subdivides scripted television series into three subcategories – streaming, cable and broadcast – and examines three categories of feature films – TV movies, theatrical release movies and streaming movies. The sources consulted and utilized in this report, in addition to a more detailed discussion of FilmLA's methodology, appear in the Appendix.

In 2023, the film industry experienced significant disruption, undergoing nearly six months of labor strikes amidst other changes in the entertainment business. This impacted not only Los Angeles, but all other jurisdictions that rely heavily on production of U.S. content. At the time of preparing this report, the film and television industry is still recalibrating and production output remains well below peak levels in 2021 and early 2022. Recent *On-Location Production Reports* from FilmLA show that regional activity began declining after Q1 2022 and has experienced consecutive slowing activity through Q2 2024.¹

Based on this report's findings, total releases for scripted productions were down -4.8 percent overall in 2023, and even more so for television (-18.3 percent), offset by an increase in theatrical releases (up 24.4 percent).

It is difficult to disentangle from these numbers the impact of the double WGA / SAG-AFTRA strikes (which started in May and ended in November) on projects released, as opposed to other factors. Given the impact to Television in particular, however, it is believed the strikes played a prominent role. The continued impact of last year's labor actions and ongoing budget restraints signal that total releases in 2024 will likely decline even further.

EXECUTIVE SUMMARY

FilmLA aggregated the six subcategories of television and film releases and compared the change in the number of releases between 2022 and 2023 for the industry as a whole. This information appears in the Executive Summary Table 1.

As shown, the number of total releases declined by only -4.8 percent between 2022 and 2023. A greater loss was originally expected, however the industry saw robust increases in the number of theatrical (+24.4 percent) and TV movie releases (+10.5 percent) year-over-year. The decline in the number of television series released was significant (-18.3 percent), bringing direct and obvious impacts to industry employment.

Television output was hard hit across all three subcategories, declining to 365 series released in 2023 from 447 releases in 2022 (-18.3 percent). Looking at the individual three categories, streaming declined by -14.7 percent and cable by -19.6 percent. The number of broadcast series released was hardest hit at -25.8 percent.

2023 Market Share of Los Angeles

With the aim of better understanding Los Angeles' global competitiveness for new film and television projects and jobs, FilmLA compared changes in the number of projects made locally to the changes in the industry overall.

- In the Television category, total releases shot in Los Angeles declined by -22.8 percent in 2023, compared to -18.3 percent for the total category.
- The number of streaming series releases shot in Los Angeles declined by -27.9 percent last year, which is greater than the -14.7 percent decline among all streaming releases.
- Los Angeles fared better with cable (-16.1 percent) and broadcast series retention (-18.9 percent) than the market overall. Declines were steeper globally for those categories at -19.6 and -25.8 percent, respectively.
- Despite being the number two production center for TV movies behind British Columbia, the number of such releases shot in Los Angeles declined by -14.9 percent, despite an aggregate increase of 10.5 percent in one year (284 projects in 2023 versus 257 in 2022).
- Though researchers observed a significant increase in theatrical releases (24.4 percent) in 2023, Los Angeles captured -8.7 percent fewer projects compared to 2022 (40 versus 47 films).



• Los Angeles experienced a pronounced downturn in the number of streaming movies released in 2023. That number declined from 22 films in 2022 to 17 in 2023 (-22.7 percent) compared to a -19.3 percent decline for the category as whole.

In summary, Los Angeles experienced declines in the number of releases across all sectors of television and film between 2022 and 2023. Total releases shot in Los Angeles declined by -19.7 percent in one year from 228 to 183 projects. In 2023, Los Angeles captured approximately 18 percent of all projects released, compared to approximately 22 percent of all projects in 2021 and 2022.

Los Angeles Vs. Other Competitive Jurisdictions in 2023 - Television

FilmLA looked at the top ten filming jurisdictions in 2023 to compare their rates of project capture for television. The information appears in Tables 2-6.

- Comparing Los Angeles to other jurisdictions where television projects are made (Table 2), Los Angeles' series count declined by -22.8 percent in one year. That being said, competitors Georgia and the United Kingdom experienced steeper series count declines of -35.2 and -33.3 percent, respectively. Conversely, New York the number two competitor last year and Ontario experienced gains of 7.7 and 29.4 percent, respectively, over the same period.
- A similar pattern emerged regarding the 203 streaming series included in this study (Table 3). Los Angeles-based streaming series count declined by -27.9 percent, as did series counts for Georgia (-21.4 percent) and the United Kingdom (-27.3 percent). Meanwhile, New York the number two competitor and Ontario posted double-digital gains of 30.8 and 25.0 percent, respectively.
- The pattern persisted for the 90 cable series released in 2023 with Los Angeles down by -16.1 percent, Georgia at -47.1 and the United Kingdom at -45.5 percent (Table 4).
- The broadcast sector was the hardest hit television category in 2023. The series count for Los Angeles was down -18.9 percent, which was lower than the aggregate decline of -25.8 (previously shown in Table 1), surpassed by much greater declines in Georgia (-55.6 percent), New York (-46.7 percent) and Illinois (-40.0 percent). This information appears in Table 5.

It should be noted that one of the key findings from FilmLA's previous 2021 / 2022 Scripted Content Study was that Georgia and the UK saw double digit increases across all television categories. In 2023, New York and Ontario experienced strong increases in the number of releases from the previous year,



especially in the streaming and cable television subcategories (Table 4 & Table 5). What this signifies is that no single jurisdiction is replacing Los Angeles as world's leading television production center; television production is running away to multiple locations, with the number two leaders rotating their positions for the last few years.

Los Angeles Vs. Other Competitive Jurisdictions in 2023 - Feature Films

Among the top ten filming jurisdictions in 2023, FilmLA looked at the comparative capture among all feature film releases. Information for the filming locations of the three subcategories of feature films released in 2023 appears in Tables 6-8.

- The TV Movie category increased output by 10.5 percent in 2023, but Los Angeles experienced a -14.9 percent decline in series released (Table 6). The number one leader in TV Movie production British Columbia also saw a small decline of -6.9 percent. Conversely, Georgia (+22.2 percent), Manitoba (+133 percent) and California (+50 percent) experienced substantial gains in this category.
- Consistent with the downturn in the number of streaming movie releases in 2023 (down -19.3 percent), nearly every jurisdiction experienced a decline in the number of streaming releases, with the sole exception being Illinois (+66.7 percent). Georgia's capture of streaming films declined by -20.0 percent, Los Angeles by -22.7 percent, New York by -56.0 percent, and the UK by -7.1 percent (Table 7).
- As noted, theatrical releases experienced strong gains last year (24.4 percent), increasing from 160 to 199 (Table 1). In 2022, Los Angeles was the number one filming destination among all theatrical releases that year (23 total), edging out second place competitor, the UK (with 22 releases), and third place finisher, New York (with 17 releases). In 2023, however, the UK claimed the top spot (with 26 theatrical releases), followed by New York (with 22 releases) and Georgia (with 12 releases) (Table 8).

This report shines a spotlight on the globally distributed nature of today's film and television business, as well as the shared challenges faced by all global film production centers in 2023.

Overall scripted content releases decreased slightly between 2022 and 2023 (-4.8 percent), with the largest contractions occurring in the television sector.

Although Los Angeles remained the top filming destination among all scripted content released in 2023, its overall market share/capture declined compared to previous years. To sustain the industry's developed workforces in Greater Los Angeles and elsewhere, jurisdictions will need to assess anew what competitiveness means in terms of financial incentives, production support infrastructure, and logistical support.

A breakdown of Los Angeles' competitive position in 2023 with regard to studio infrastructure and tax incentives appears in Appendix A.

TABLES

TABLE 1

TOTAL RELEASES

	2021	2022	2023	% CHG. 2022-23	% CHG. 2021-23
Television	402	447	365	-18.3%	-9.2%
Streaming	186	238	203	-14.7%	9.1%
Cable	115	112	90	-19.6%	-21.7%
Broadcast	101	97	72	-25.8%	-28.7%
TV Movies ¹	249	257	284	10.5%	14.1%
Theatrical Release Movies ²	185	160	199	24.4%	7.6%
Streaming Movies	164	176	142	-19.3%	-13.4%
Total	1000	1040	990	-4.8%	-1.0%

LOS ANGELES RELEASES—

	2021	2022	2023	% CHG. 2022-23	% CHG. 2021-23
Television	129	136	105	-22.8%	-18.6%
Streaming	60	68	49	-27.9%	-18.3%
Cable	30	31	26	-16.1%	-13.3%
Broadcast	39	37	30	-18.9%	-23.1%
TV Movies ¹	48	47	40	-14.9%	-16.7%
Theatrical Release Movies ²	28	23	21	-8.7%	-25.0%
Streaming Movies	21	22	17	-22.7%	-19.0%
Total	226	228	183	-19.7%	-19.0%

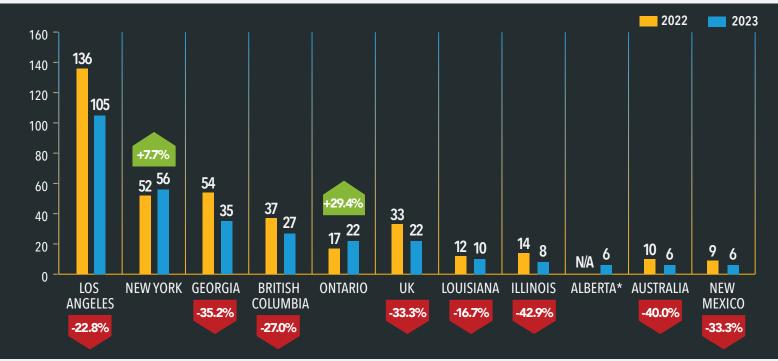
¹ Includes U.S.-scripted, first-run movies that appear on cable and/or linear television

Sources: IMDbPro, Releasestv.com, The Numbers and FilmLA

² Includes U.S.-scripted, first-run movies in a theatrical release and excludes streaming movies, re-releases, prior year releases and animation.

Total U.S. Scripted Television Series Distributed

Top Ten Filming Jurisdictions 2022 vs. 2023



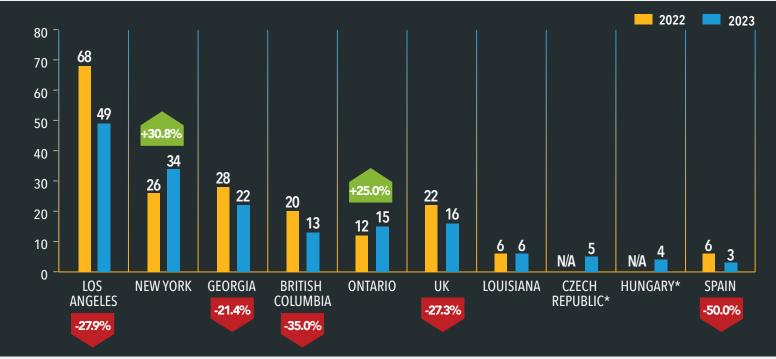
Sources: IMDbPro and FilmLA

* A N/A indicates that jurisdiction did not make the top ten filming locations in 2022.

TABLE 3

U.S. Scripted Streaming Television Series Distributed

Top Ten Filming Jurisdictions 2022 vs. 2023

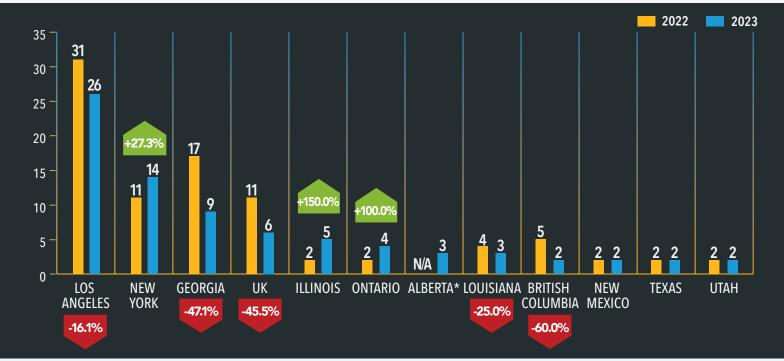


Sources: IMDbPro and FilmLA

* A N/A indicates that jurisdiction did not make the top ten filming locations in 2022.

U.S. Scripted Cable Television Series Distributed

Top Ten Filming Jurisdictions 2022 vs. 2023



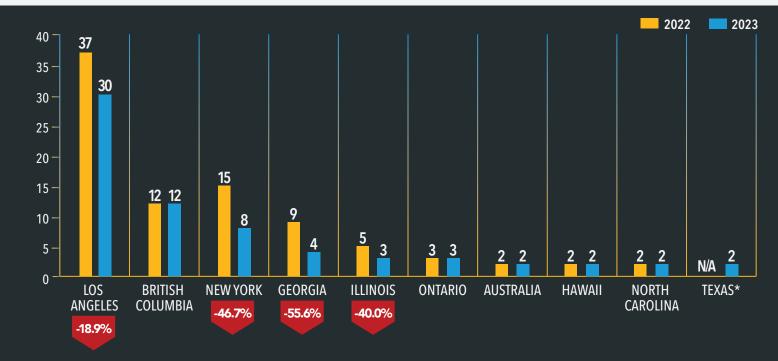
Sources: IMDbPro and FilmLA

* A N/A indicates that jurisdiction did not make the top ten filming locations in 2022.

TABLE 5

U.S. Scripted Broadcast Television Series Distributed

Top Ten Filming Jurisdictions 2022 vs. 2023



Sources: IMDbPro and FilmLA

* A N/A indicates that jurisdiction did not make the top ten filming locations in 2022.

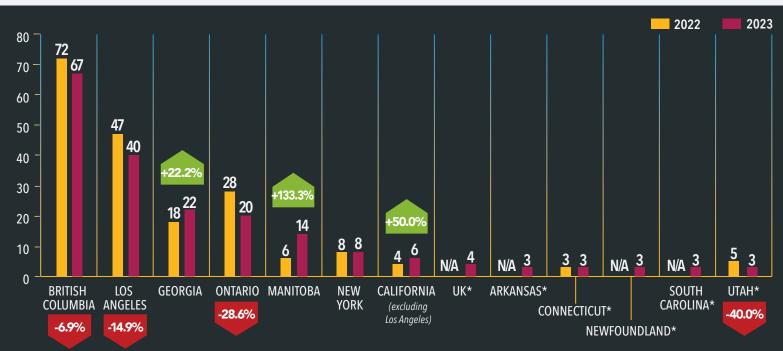


Pictured: Downtown Los Angeles, a frequent filming location for the TV series "The Rookie," a 2023 recipient of the California Film & Television Tax Credit.

TABLE 6

TV Movies Distributed¹

Top Ten Filming Jurisdictions 2022 vs. 2023



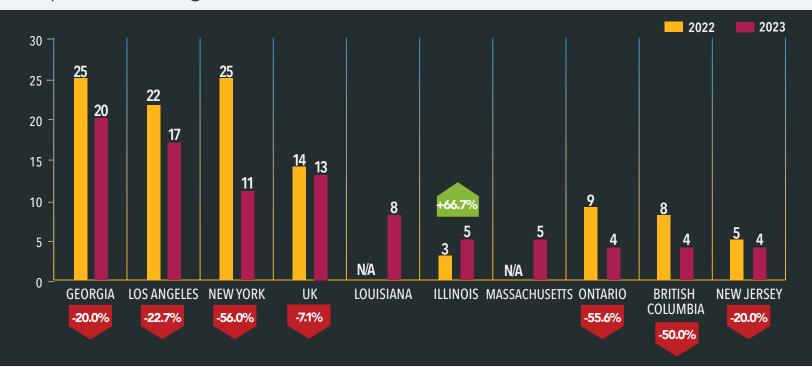
Sources: IMDbPro and FilmLA

* A N/A indicates that jurisdiction did not make the top ten filming locations in 2022.

¹ NOTE: Pertains to first-run cable and linear TV movies only.

Streaming Movies Distributed¹

Top Ten Filming Jurisdictions 2022 vs. 2023



Sources: IMDbPro and FilmLA

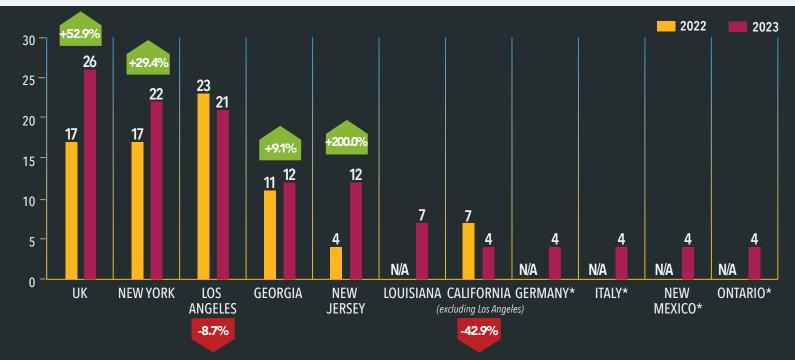
* A N/A indicates that jurisdiction did not make the top ten filming locations in 2022.

¹ NOTE: Pertains to PVOD services and excludes AVOD streamers.

TABLE 8

Theatrical Release Movies Distributed

Top Ten Filming Jurisdictions 2022 vs. 2023



Sources: IMDbPro and FilmLA

* A N/A indicates that jurisdiction did not make the top ten filming locations in 2022.



Methodology & Sources

The primary source for locations information in this study was IMDbPro. Other sources for locations information included websites such as *The Cinemaholic* and *The Heavy*. In instances where such information was not listed, particularly for feature films, the filmmakers were contacted directly.

Television Project Tracking

FilmLA has been tracking scripted television series in release for over 10 years using a combination of IMDbPro and release schedules. Animation, reality television and documentary projects were excluded in this analysis, as were shorter television projects of less than 20 minutes per episode. With the exception of a few cable and streaming series projects, FilmLA was able to obtain locations information for 98 percent of the series released over the subject period.

Feature Film Project Tracking

FilmLA only counted those scripted feature films of 60 minutes or more that were distributed and/or released over the subject period. Excluded projects included anthologies, documentaries and re-releases from years prior. It should be noted that the few features produced by a streaming company that had an initial theatrical run were counted in the streaming movies category.

Unlike television, most features films are shot in several jurisdictions. For instance, for features shot in Los Angeles over the subject period, it was not uncommon for a project to shoot in Los Angeles County and neighboring counties. For purposes of analysis, FilmLA therefore defined "Los Angeles" to include the neighboring counties of Orange, San Bernardino and Ventura counties. Any jurisdiction outside of those these counties would be considered "California."

For those feature films that were released theatrically and shot in multiple locations, FilmLA counted the location where greater than 50 percent of the principal photography occurred. In the few instances where the project was shot equally in multiple jurisdictions, FilmLA counted the location where sound stage work occurred.

In 2023, FilmLA counted over 1500 films that were distributed in the U.S. The majority of these films were low-budget, self-distributed projects for which locations information is unavailable. FilmLA was able to obtain locations information on 98 percent of the theatrical release and streaming movies. Therefore, these low-budget projects were excluded from this analysis since it was hard to obtain a statistically valid sample.

Comparative Filming Incentives & Infrastructure 2023

Jurisdiction	Amount of Credit ¹	Minimum Spend (\$000s)	Annual Funding Cap (\$millions)	Sunset Date	Covers Non-resident ATL ²	Studio Infrastructure (millions SF) ³
California	20-30%	\$1,000	\$330	2030-2031	No	7.9
New York	30-40%	\$1,000 NYC & metro \$250 rest of state	\$700	2034	30% (limited)	3.3
Georgia	20-30%	\$500	None	None	20%	4.1
United Kingdom ⁴	25.5%	10% of the project's core expenditure must be UK expenditure	None	None	25.5%	6.6
British Columbia ^{5, 6}	28%	CAD \$100-\$1,000	None	None	No	2.5
Ontario ^{5, 7}	21.5%	CAD \$100-\$1,000	None	None	No	3.8

Sources: Individual Film Commissions, Entertainment Partners and FilmLA

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¹ Credit uplifts and/or regional filming bonuses and other may apply.

² "ATL" refers to "above the line" and includes directors, actors, writers, and producers.

³ Data is from FilmLA's most recent Sound Stage Study, which was issued in March 2024: https://filmla.com/filmla-updates-ongoing-study-of-sound-stage-development-and-production/

⁴ The UK has a range of national and regional filming incentives which can be combined with the Film Tax Relief.

⁵A Canadian federal incentive of an additional 16 percent on net labour may apply.

⁶An additional credit of 16 percent of qualifying labor for local digital animation, VFX, and post-production (DAVE)

⁷ Credit applies to labor expenditures and applicants may be eligible for a higher first-time production credit of 40%, on the first \$240,000 of labor expenditures.

California Film & Television Tax Credit Recipients

Feature Film Releases 2023

Title	Platform	Shoot Days	# Crew Hired	# Cast Hired	Qualified Expenditures (\$000s)
80 for Brady	Theatrical	35	231	31	\$21,489
Earth Mama	Theatrical	30	75	40	\$3,110
House Party	Theatrical	32	120	76	\$13,996
Sweetwater	Theatrical	30	100	49	\$5,678
White Men Can't Jump	Streaming	40	225	56	\$31,854
You People	Streaming	45	200	69	\$44,561
Your Place or Mine	Streaming	49	250	40	\$43,052
Total		378	1551	379	\$246,833

Sources: California Film Commission, IMDbPro and FilmLA

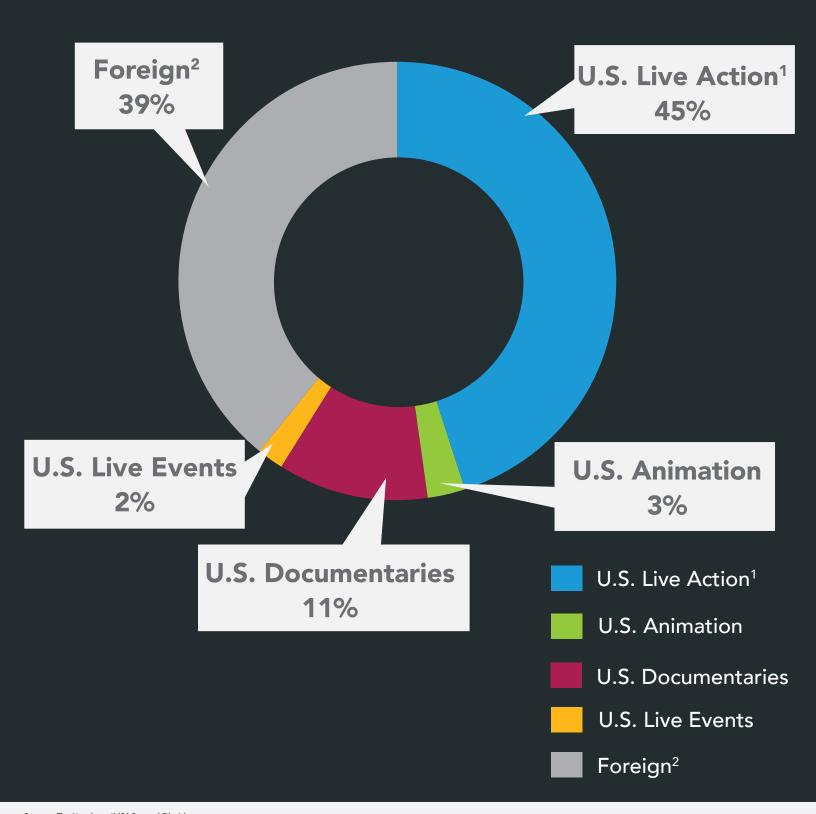
California Film & Television Tax Credit Recipients

Television Releases 2023

Title & Season	Platform	Shoot Days	# Crew Hired	# Cast Hired	Qualified Expenditures (\$000s)
S.W.A.T. S7	Broadcast	122	230	528	\$67,128
The Rookie S6	Broadcast	179	220	383	\$98,222
Good Trouble S5	Cable	148	830	215	\$60,295
Mayans MC S5	Cable	82	175	275	\$57,573
Miracle Workers S4	Cable	45	175	10	\$22,816
Perry Mason S2	Cable	104	325	332	\$79,586
Snowfall S6	Cable	83	195	95	\$62,455
Winning Time S2	Cable	154	400	35	\$129,543
Hunters S2	Streaming	107	160	267	\$75,217
Killing It S2	Streaming	40	285	220	\$24,868
Rap Sh!T S2	Streaming	64	220	98	\$50,256
Star Trek: Picard S3	Streaming	100	350	150	\$100,517
Total		1282	3565	2608	\$828,438

Sources: California Film Commission, IMDbPro and FilmLA

2023 Theatrical Releases*



Sources: The Numbers, IMDbPro and FilmLA

^{*}NOTE: Based on a total of 445 theatrical releases in 2023. This number excludes 136 releases/re-releases from previous years.

¹ Includes U.S. co-productions. ² Includes foreign-produced documentaries and animation.



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Integral to the work of FILML.A., INC® 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.

Have a question about this sound stage report or other film industry studies? Please direct inquiries and opportunities to:

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