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For Immediate Release:

FilmLA Updates Ongoing Study of Sound Stage Development and Production

Availability Expands as LA, Major Competitors Add New Stage Infrastructure

LOS ANGELES – February 20, 2024 – Today, FilmLA issued its sixth Sound Stage Study, updating its ongoing survey of Los Angeles area studio developments, and releasing new stage occupancy and use data for calendar year 2022.

FilmLA's report is made possible by a unique data-sharing partnership with 17 participating studio operators, who by entrusting FilmLA with sensitive business information, help bring the local production picture into clearer focus. Participating studios, which include the six major Hollywood studios and the region's largest independent operators (see attached presentation) together control 35 facilities and 83 percent of the estimated 6.5 million square feet of certified sound stage space available in Greater Los Angeles.

Since FilmLA's last sound stage update in March of 2023, both the UK and Georgia have added more than one million square feet of stage inventory to their existing supply. Now comparable to Los Angeles, the UK currently has around 6.6 million square feet of stage space, with plans to add dozens of new facilities. Georgia currently has over 4 million square feet of studio space and several significant projects in various planning and expansion phases.

"Just like with trained crew, the availability of purpose-built sound stages is a factor that helps determine the attractiveness of any filming location," observed FilmLA President Paul Audley. "Our study shows that many jurisdictions are expanding their stage infrastructure and competing harder for the business we also want to win for LA."

On a local level, FilmLA is tracking 18 new studio projects totaling roughly 3.5 million square feet of space in various stages of planning and development in Los Angeles. A rundown of these projects and their progress is summarized in FilmLA's 16-slide report.

According to FilmLA's research participants, recent studio occupancy and utilization in

Los Angeles and elsewhere have decreased, as was expected. As new supporting data reveals, as fears of industry strikes began to permeate the industry in the latter part of 2022, Q4 stage occupancy fell below seasonal norms. Overall, LA area stage operators reported an average annual occupancy of 90 percent in 2022, down -3 percent from the prior year. Future FilmLA reports will show the full effect of industry disruption on LA area sound stage occupancy.

In terms of utilization, a total of 1,354 projects were filmed in 35 facilities owned by the 17 studio participants in 2022. These 1,354 projects generated a total of 10,356 stage Shoot Days, with episodic television series accounting for the largest segment of production – approximately 30 percent of all projects and two-thirds of all stage shoot days.

With the number of series episodes ordered per season declining across all segments of television (streaming, broadcast and cable), the number of Shoot Days that series generated declined by -36.4 percent between 2018 and 2022 from 10,582 to 6,901. In 2022, series Shoot Days accounted for 66 percent of all production activity, compared to approximately 73 percent in 2018.

Santa Clarita Studios, having joined as a research program participant last year, is the latest studio to have its data included in FilmLA's sound stage study.

About FilmLA

FilmLA 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.

- SEE ATTACHED PRESENTATION -

2022 SOUNDSTAGE STUDY

Film
LA

FOREWORD

This report is FilmLA's sixth annual sound stage study. The 17 studio participants in this study include all of the major legacy studios and the larger independents, representing approximately 83 percent of the current 6.5 million square feet of certified stage space in the Los Angeles market.

In 2022, a total of 1,354 projects were filmed in 34 facilities owned by the 17 studio participants. These 1,354 projects generated a total of 10,356 stage shoot days, with episodic television series accounting for the largest segment of production – approximately 30 percent of all projects and two-thirds of all stage shoot days.

With the number of episodes per season declining across all segments of television (streaming, broadcast and cable), the number of shoot days that series generated declined by -34.8 percent between 2018 and 2022 from 10,582 to 6,901. In 2022, series shoot days accounted for 66 percent of all production activity, compared to approximately 73 percent in 2018.

As fears of a double strike started permeating the industry in the latter part of 2022, stage operators reported average annual occupancy of 90 percent. This is down -3 percent from 93 percent from 2021.

Since FilmLA's most recent report was released last March, both the UK and Georgia have added more than one million square feet of stage inventory. Now comparable to Los Angeles, the UK currently has 6.6 million square feet of stage space, with plans to add dozens of new facilities. Georgia currently has over 4 million square feet and several significant projects in various planning and expansion phases.

On a local level, FilmLA is tracking 18 studio projects, with approximately 182 stages and roughly 3.5 million square feet of space in various phases of planning and development in Los Angeles. A rundown of these projects and their progress is summarized in the 16-slide report.



PARTICIPANTS



LOS ANGELES CENTER STUDIOS

FOX | STUDIO LOT



QUIXOTE



Current Certified **SOUNDSTAGE SPACE**¹ in Los Angeles



Occupancy peaked in **2016** and has been in the **90** percentile range since



473
Certified Stages

75
Certified Production Facilities

6.5 M SF
Certified Stage Space*

1.4 M SF
of Uncertified Stage Space*



Note: Data pertains only to facilities with one stage >5K SF ¹ Data is current as of December 2023.

**A certified sound stage is a building or portion of a building usually insulated from outside noise and natural light that has met city criteria. 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). <https://www.lafd.org/film-unit/certified-studios>. For more information, please contact the LAFD Film Unit at lafdfilm@lacity.org or via phone at 213-978-3670.*

SOUNDSTAGE PARTICIPANTS

as a Percentage of
LA County Market



35 FACILITIES

■ FilmLA's 17 Participants ■ Others



Square Feet of
Certified Stage Space

5.4M SQ. FT.

83%



Certified Stages

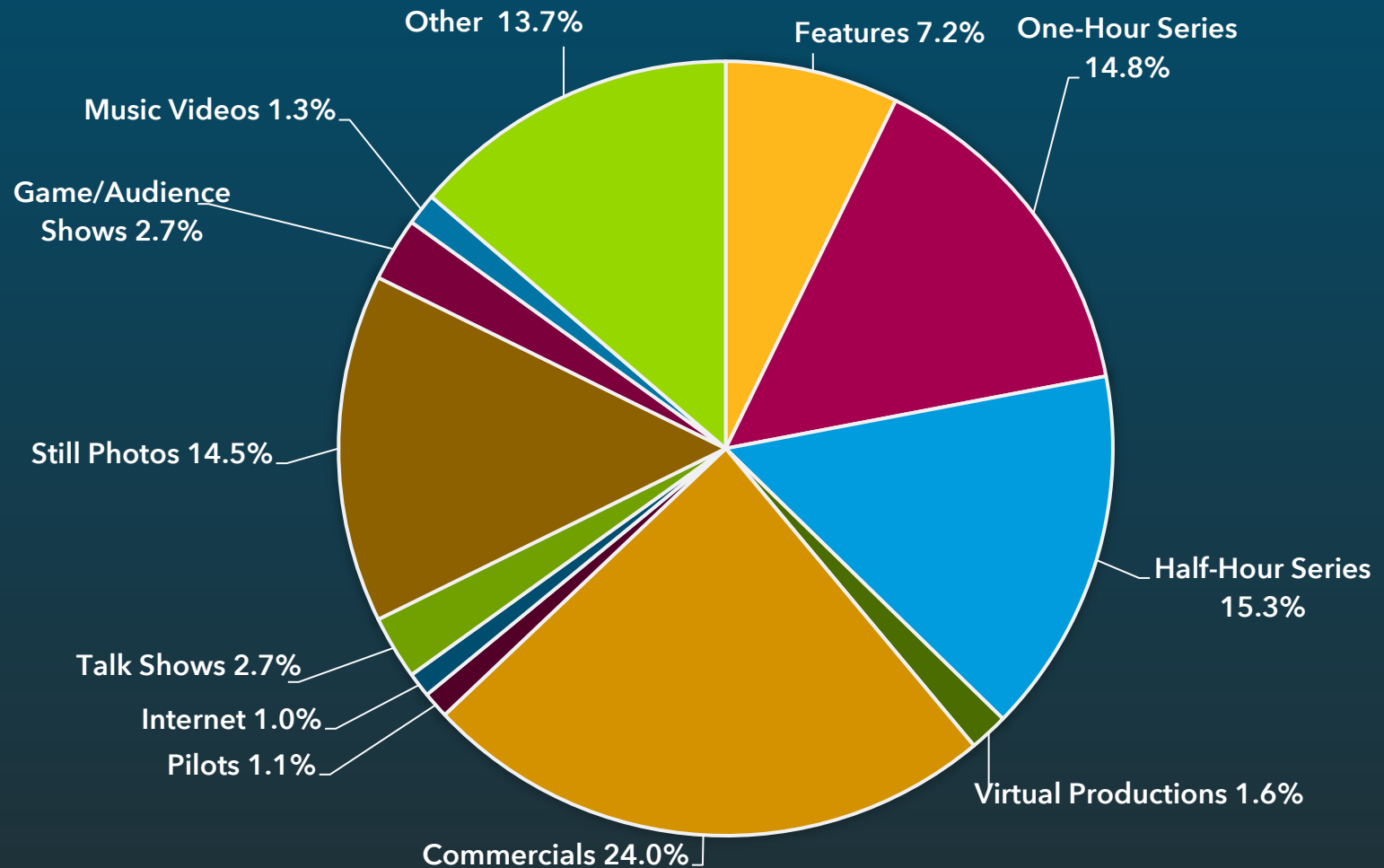
70%

333 STAGES

NUMBER OF PROJECTS FILMED

on Participant
Stages in 2022

Type of Production	Projects
Feature Films	98
One-Hour Series	
Streaming Series	100
Cable Series	15
Broadcast Series	85
Half-Hour Series	
Streaming Series	124
Cable Series	30
Broadcast Series	53
Virtual Productions*	22
Commercials	325
Pilots	15
Internet	14
Talk Shows	36
Still Photography	197
Game/Audience Shows	36
Music Video	18
Other	186
Total	1,354



* Virtual productions included 15 television series and 7 commercials

Source: Studio participants and FilmLA

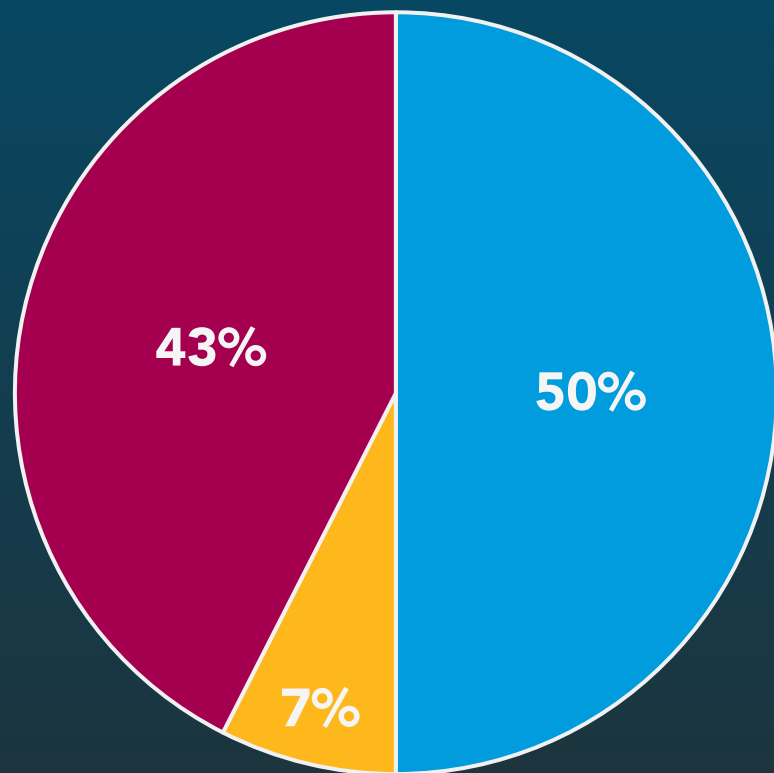
NUMBER OF PROJECTS FILMED on Participant Stages

Production Category	2022	2021	2020	2019	2018	% Chg. 2018-2022	% Chg. 2021-2022
Feature Films	98	81	47	93	88	11.4%	21.0%
One-Hour TV Series	200	235	155	238	215	-7.0%	-14.9%
Half-Hour TV Series	207	209	152	225	228	-9.2%	-1.0%
Virtual Productions	22	13	-	-	-	-	69.2%
Commercials	325	338	255	414	408	-20.3%	-3.8%
Pilots	15	17	15	45	43	-65.1%	-11.8%
Internet	14	20	15	39	12	16.7%	-30.0%
Still Photography	36	32	28	45	51	-29.4%	12.5%
Talk Shows	197	222	144	275	314	-37.3%	-11.3%
Game/Audience Shows	36	37	-	-	-	-	-2.7%
Music Videos	18	11	7	24	8	125.0%	63.6%
Other	186	92	80	302	253	-26.5%	102.2%
Total	1,354	1,307	898	1,700	1,620	-16.4%	3.6%

ONE-HOUR TV SERIES

200 SERIES

By Production Type

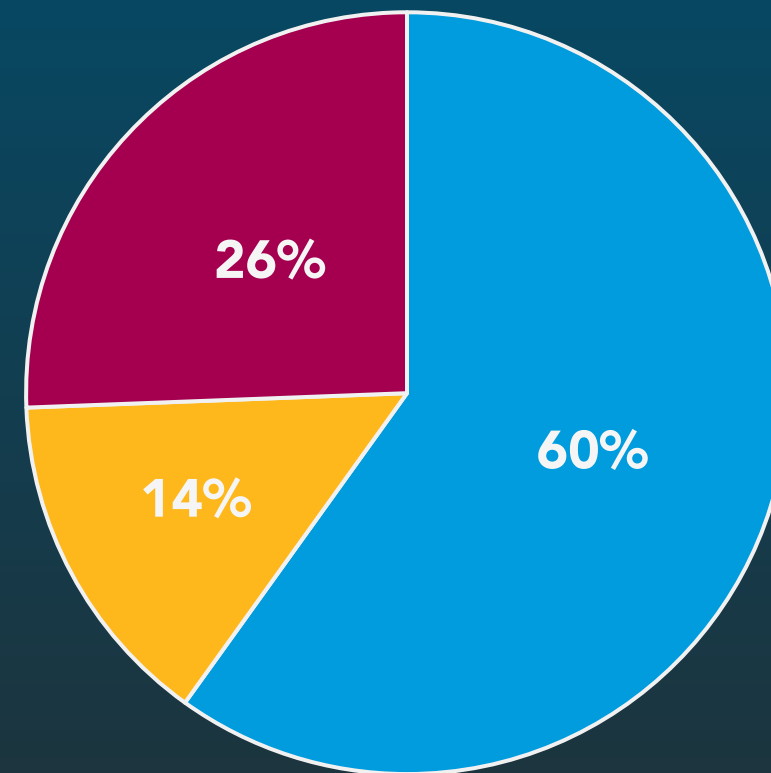


■ Streaming ■ Cable ■ Broadcast

HALF-HOUR TV SERIES

207 SERIES

By Production Type



■ Streaming ■ Cable ■ Broadcast

TV SERIES

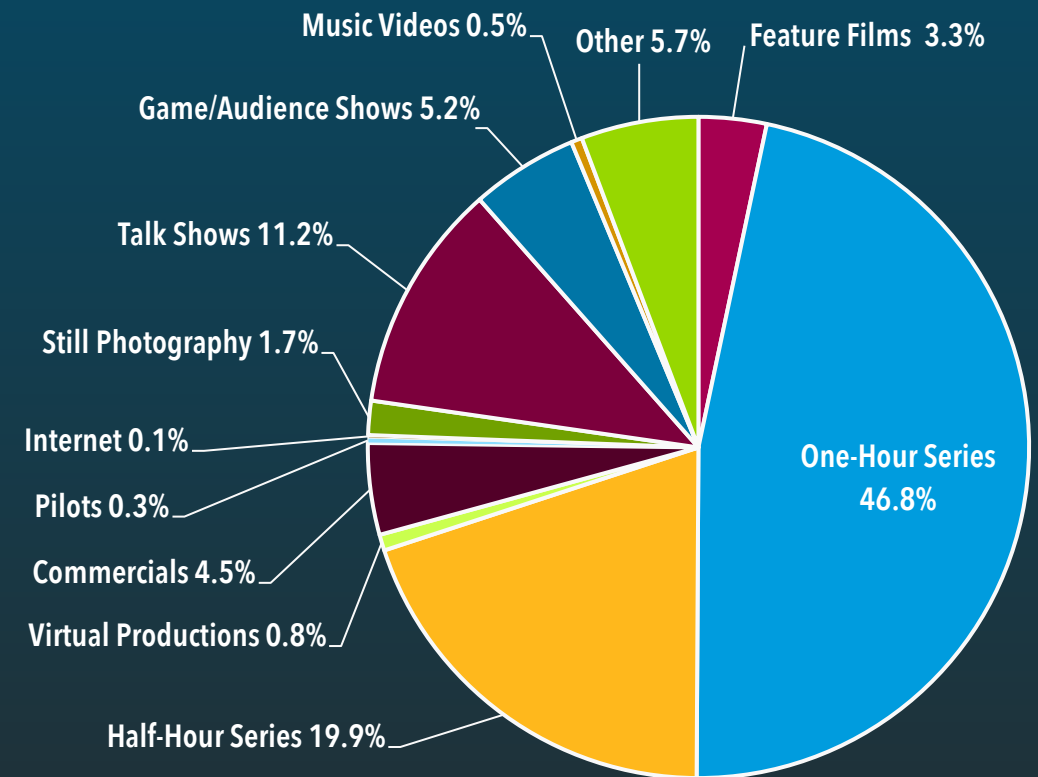


STAGE SHOOT DAYS

Comparative Annual Stage Shoot Days

Production Category	2022	2021	2020	2019	2018
Feature Films	344	367	146	293	480
One-Hour TV Series	4,843	3,887	1,966	4,655	6,769
Half-Hour TV Series	2,058	3,240	2,459	3,119	3,813
Virtual Productions	81	79	--	--	--
Commercials	463	1,812	400	1,357	903
Pilots	26	34	36	92	77
Internet	14	106	141	73	76
Still Photography	173	212	303	695	501
Talk Shows	1,162	955	297	1,249	987
Game/Audience Shows ¹	542	7	--	--	--
Music Videos	56	530	13	19	6
Other	594	579	430	756	879
Total	10,356	11,808	6,191	12,308	14,491

Stage Shoot Days 2022



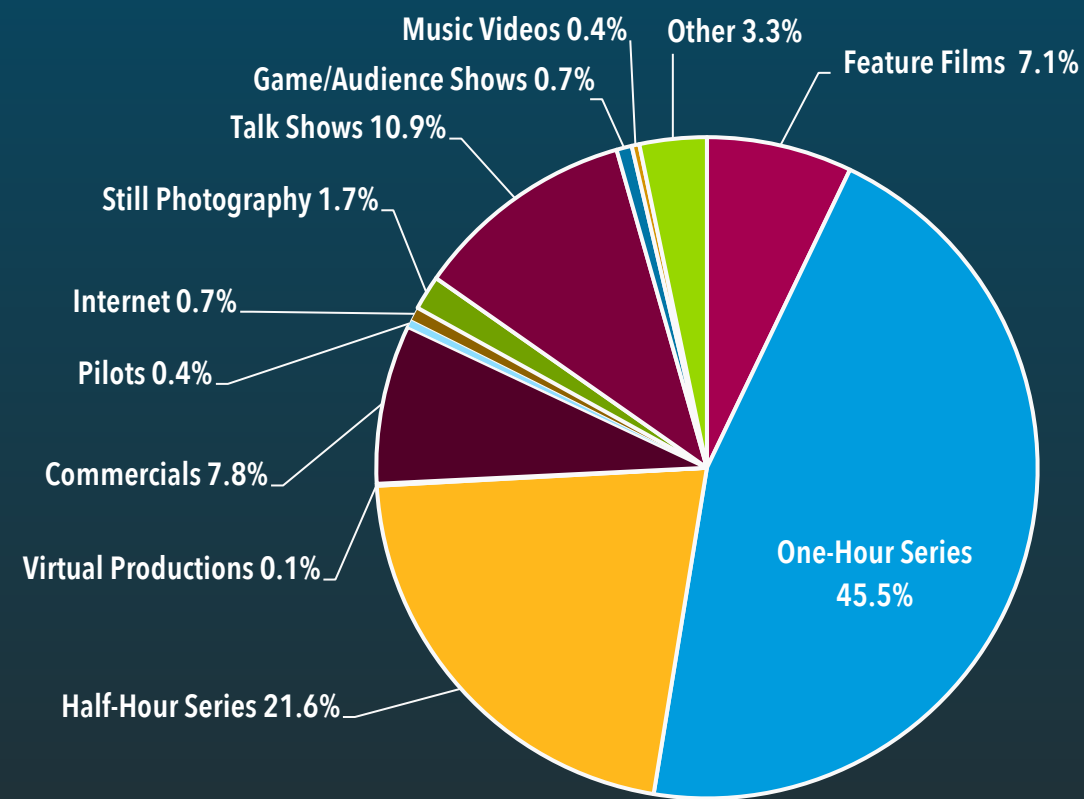
Source: Studio participants and FilmLA

BACKLOT SHOOT DAYS

Comparative Annual Backlot Shoot Days

Production Category	2022	2021	2020	2019	2018
Feature Films	76	187	41	93	88
One-Hour TV Series	485	1105	656	238	215
Half-Hour TV Series	230	262	422	225	228
Virtual Productions	1	--	--	--	--
Commercials	83	57	81	414	408
Pilots	4	8	10	45	51
Internet	7	14	9	45	43
Still Photography	18	9	9	39	12
Talk Shows	116	102	17	275	314
Game/Audience Shows	8	0	--	--	--
Music Videos	4	7	7	24	8
Other	35	88	194	302	253
Total	1067	1839	1446	1700	1620

Backlot Shoot Days 2022

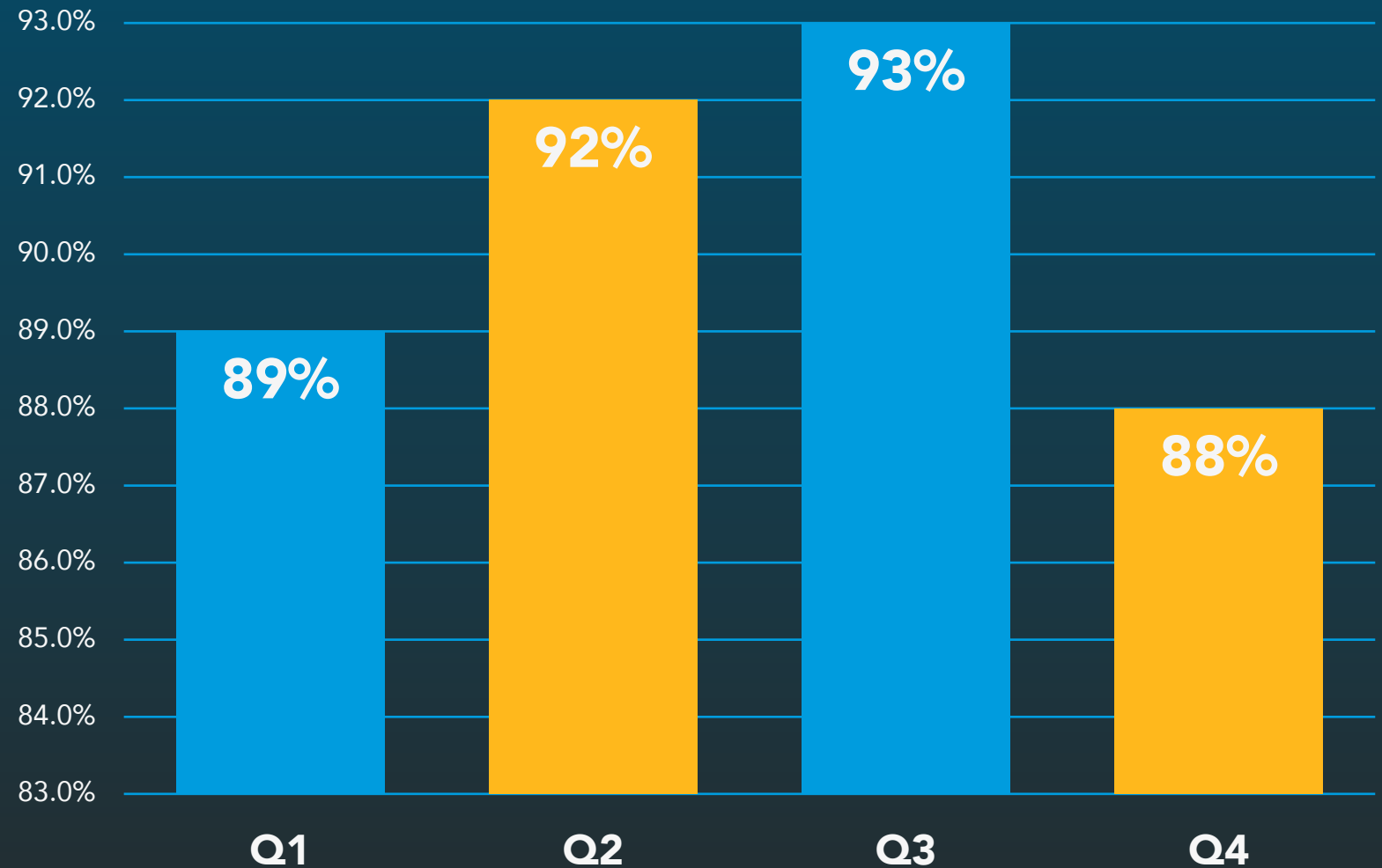


Source: Studio participants and FilmLA

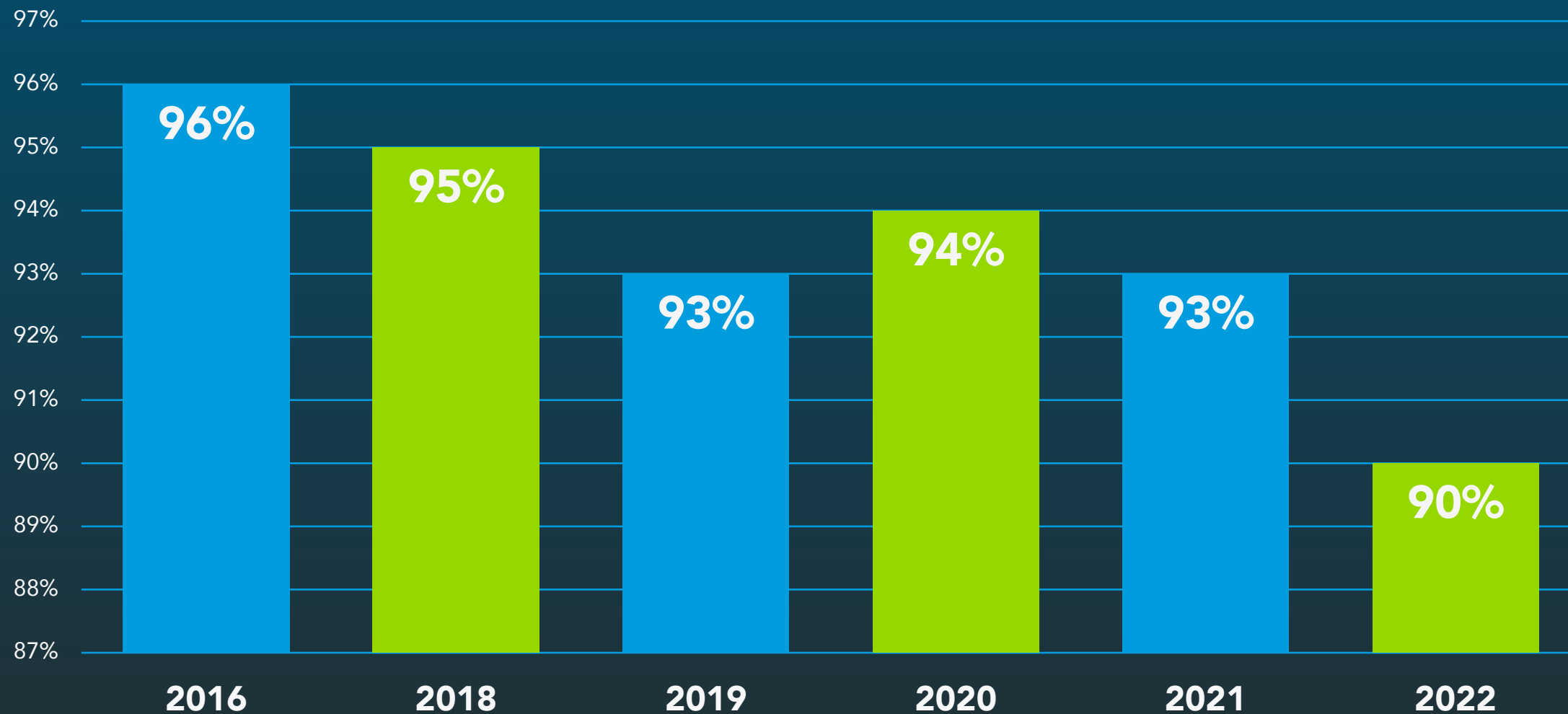
2022 AVERAGE OCCUPANCY

2022
AVERAGE
ANNUAL
OCCUPANCY
90%

Average Quarterly Occupancy 2022



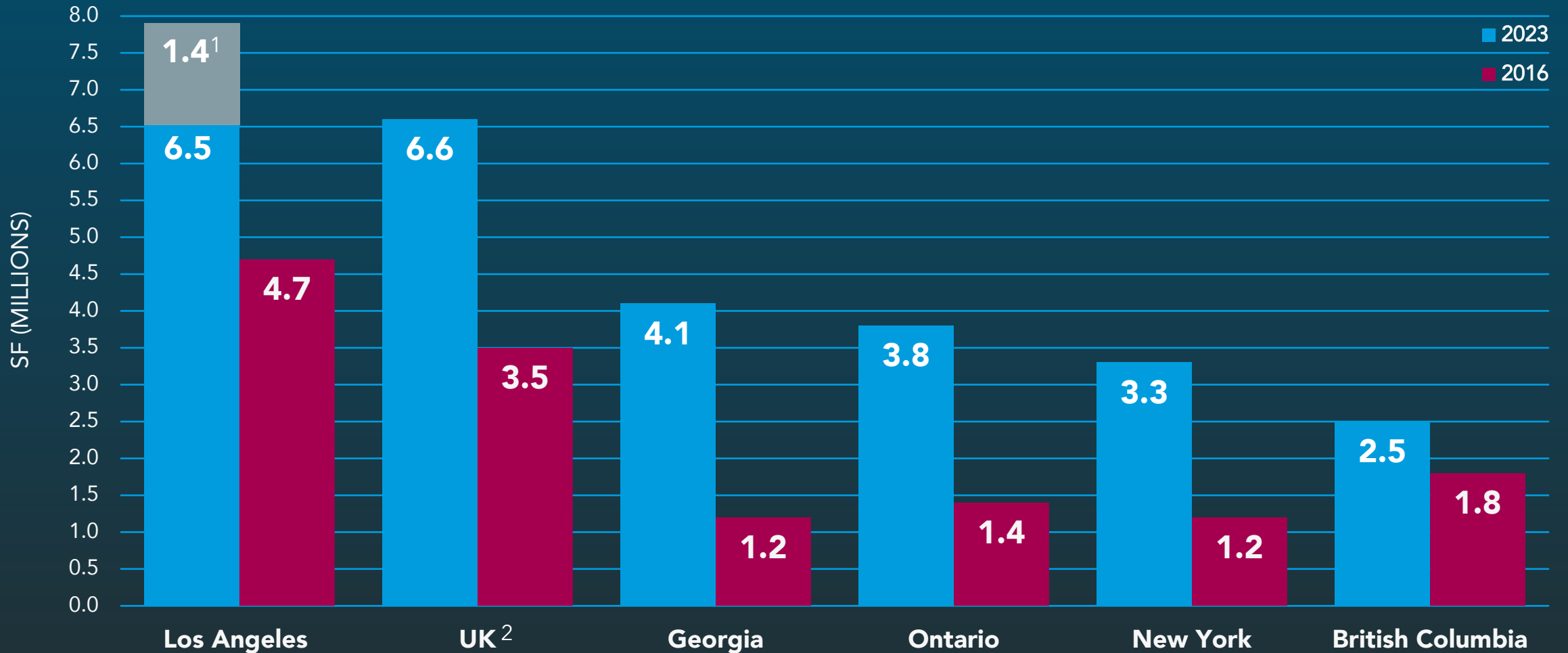
HISTORICAL OCCUPANCY 2016-2022*



* A FilmLA study was not conducted in 2017 Source: Studio participants and FilmLA

COMPETITIVE JURISDICTIONS

Square Feet of Stage Space
2023 vs. 2016



Note: Data in all markets pertains only to studios with a minimum of one stage >5K SF
Sources: Individual film commissions and FilmLA

¹ Los Angeles has an additional 1.4 million SF of non-certified stage space meeting that criteria
² Stage space in the UK was not tracked until 2020 (2018 report)

1 PLANNED & PROPOSED

Studio Projects
in Alphabetical Order by Project Name

STUDIO NAME	LOCATION	# NEW STAGES	EST. SF	OPENING DATE
Alameda Crossing	Downtown Arts District	10	TBD	Application Filed November 2022
8th & Alameda Studios	Downtown Arts District	17	TBD	Entitlement Phase
East End (Glendale Campus)	Glendale	3	35K	Opening March 2024
East End (Griffith Park Campus)	Glendale	10	200K	Construction Start Late Q1/Early Q2 2024
East End (Mission Campus)	Boyle Heights	5	102K	Construction Start Late Q1/Early Q2 2024
East End Studios (6th & Alameda)	Downtown Arts District	16	300K	Construction Start Q4 2024
Echelon Studios	Hollywood	5	87K	Under Construction. Estimated 2026 Opening
Echelon Television Center	Hollywood	4	76K	Entitlement Phase
Fox Future	Century City	9	TBD	Entitlement Phase
Radford Studio Center	Studio City	2-7	TBD	Entitlement Phase
Reframe Studios	Atwater Village	2	65K	Opening June 2024

2

PLANNED & PROPOSED

Studio Projects

in Alphabetical Order by Project Name

STUDIO NAME	LOCATION	# NEW STAGES	EST. SF	OPENING DATE
Rye Canyon Studios	Santa Clarita	28	504K	Status Unknown
Shadowbox Studios	Santa Clarita	19	475K	Construction Start Q2 2024
Stocker Street Creative Studio	Baldwin Hills-Crenshaw	5	57K	Entitlement Phase
Sunset Glenoaks	Sun Valley	7	126K	Opening March 2024
Sylmar Studios	Sylmar	12	300K	Under Construction. Phase 1 Opening Mid-2024
TVC 2050	Beverly/Fairfax District	9	TBD	Entitlement Phase
WB Ranch Lot (Worthe)	Burbank	16	320K	Under Construction. Estimated 2025 Opening

ESTIMATED 182 STAGES

ESTIMATED 3.5 M SF

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 own or lease, and film on, one or more newly constructed or renovated soundstages certified by the California Film Commission.

For more information & frequently asked questions on SB 144, please visit the California Film Commission's website:
<https://film.ca.gov/tax-credit/soundstage-tax-credit/>

ABOUT FILMLA RESEARCH

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

*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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