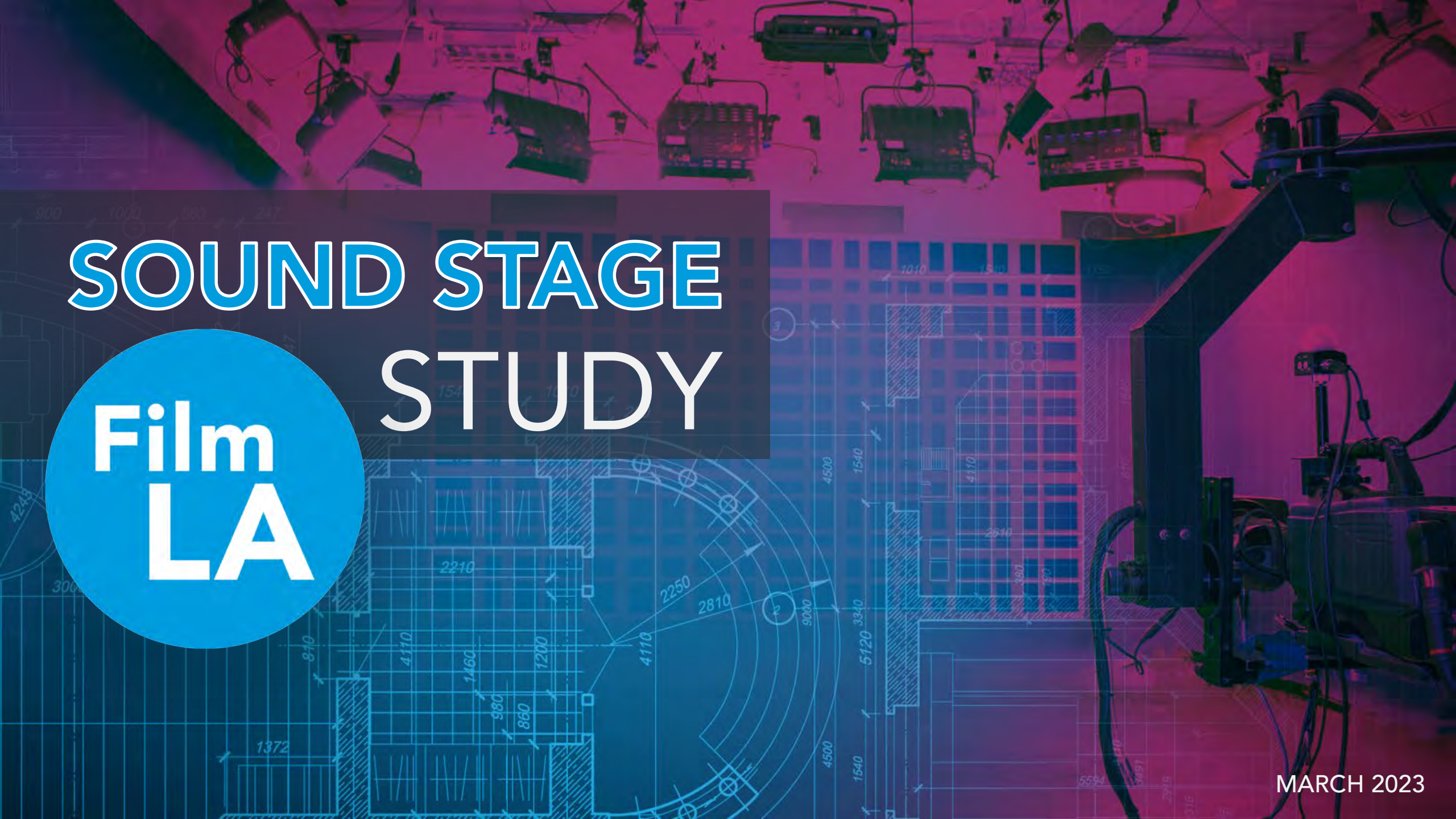




SOUND STAGE STUDY

Film
LA

MARCH 2023

FOREWORD



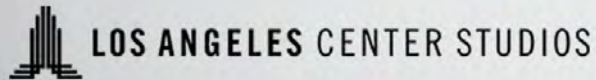
The operating metrics/data in this study (*i.e.*, number of projects, stage shoot days and occupancy) pertain to year 2021.

All data pertaining to certified sound stage space in Los Angeles, competitive jurisdictions, and planned and proposed studios is current as of the time of this study.

At the time of preparing this report, the industry is being impacted by corporate restructuring and impending union negotiations which have caused many productions to pause.

→ FilmLA reported that year-over-year shoot day activity was already down -19.5 percent in Q4 2022

PARTICIPANTS



CERTIFIED SOUND STAGE

Film
LA

SPACE IN LOS ANGELES



4 recent studio openings in 2022



2 major expansions of pre-existing facilities in 2022



Stable occupancy in mid-90s range since 2016



445

Certified
Stages



64

Certified
Production
Facilities



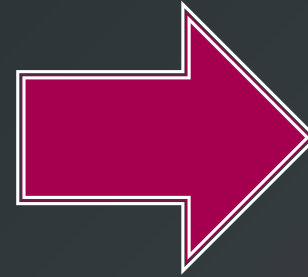
6.2M

SF of
Certified
Stage Space

**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 PARTICIPANTS

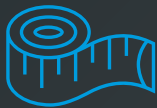


as a Percentage of
LA County Market



33 FACILITIES

Square Feet of
Certified Stage Space



■ FilmLA's 16 Participants ■ Others

73%

4.6M
SQ. FT.

Certified Stages



66%

293
STAGES

NUMBER OF PROJECTS FILMED ON PARTICIPANT STAGES 2021



* Virtual productions included 4 features, 8 television shows, and one commercial, which were counted separately from other categories

Type of Production	Projects
Feature Films	81
One Hour Series	
Streaming Series	111
Cable Series	35
Broadcast Series	82
Unknown	7
Half Hour Series	
Streaming Series	96
Cable Series	37
Broadcast Series	73
Unknown	3
Virtual Productions*	13
Commercials	338
Pilots	17
Internet	20
Still Photography	222
Talk Show	32
Game/Audience Shows	37
Music Video	11
Other	92
Total	1307

SOUND STAGE PROJECTS 2018-2021



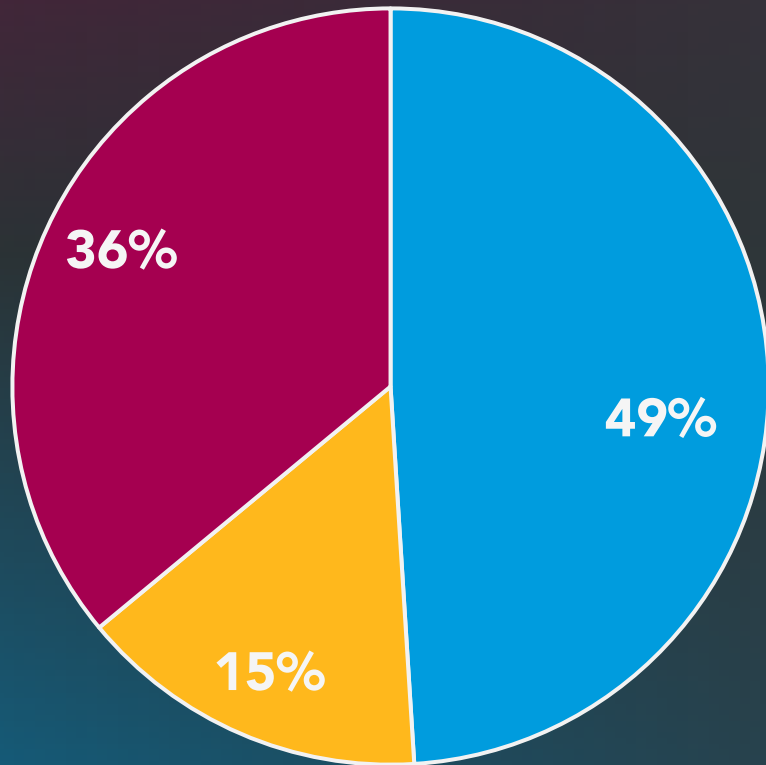
Type of Production	2021	2020*	2019	2018	% Change 2018-2021
Feature Films	81	47	93	88	-8.0%
One Hour TV Series	235	155	238	215	9.3%
Half Hour TV Series	209	152	225	228	-8.3%
Virtual Productions	13	-	-	-	-
Commercials	338	255	414	408	-17.2%
Pilots	17	15	45	43	-60.5%
Internet	20	15	39	12	66.7%
Still Photography	222	144	275	314	-29.30%
Talk Shows	32	28	45	51	-37.3%
Game/Audience Shows	37	-	-	-	-
Music Videos	11	7	24	8	37.5%
Other	92	80	302	253	-63.6%
Total	1307	898	1700	1620	-19.3%

TV SERIES

Film
LA

ONE-HOUR TV SERIES 228 SERIES

By Production Type



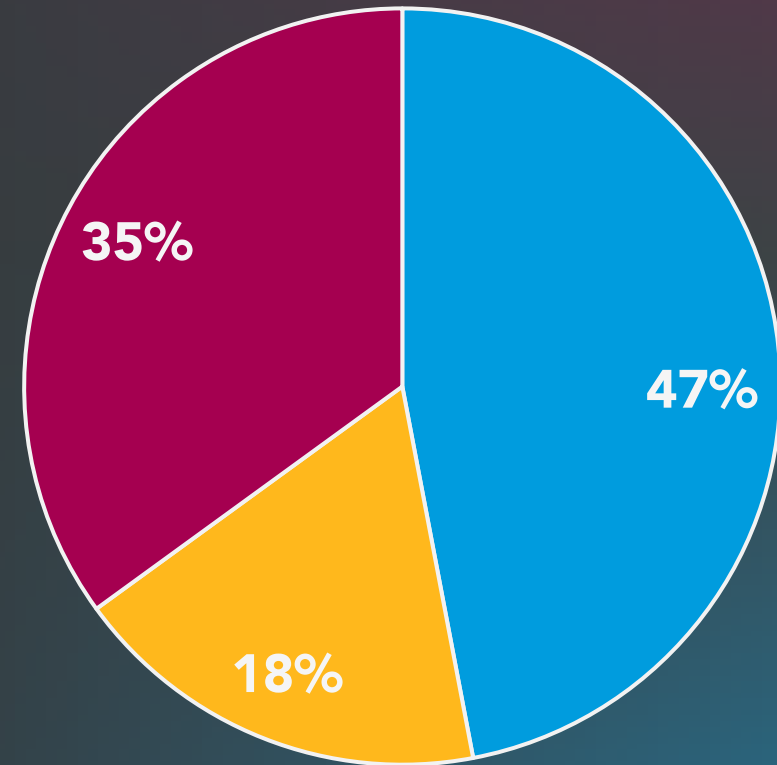
□ Streaming □ Cable □ Broadcast

2021



HALF HOUR TV SERIES 206 SERIES

By Production Type



□ Streaming □ Cable □ Broadcast

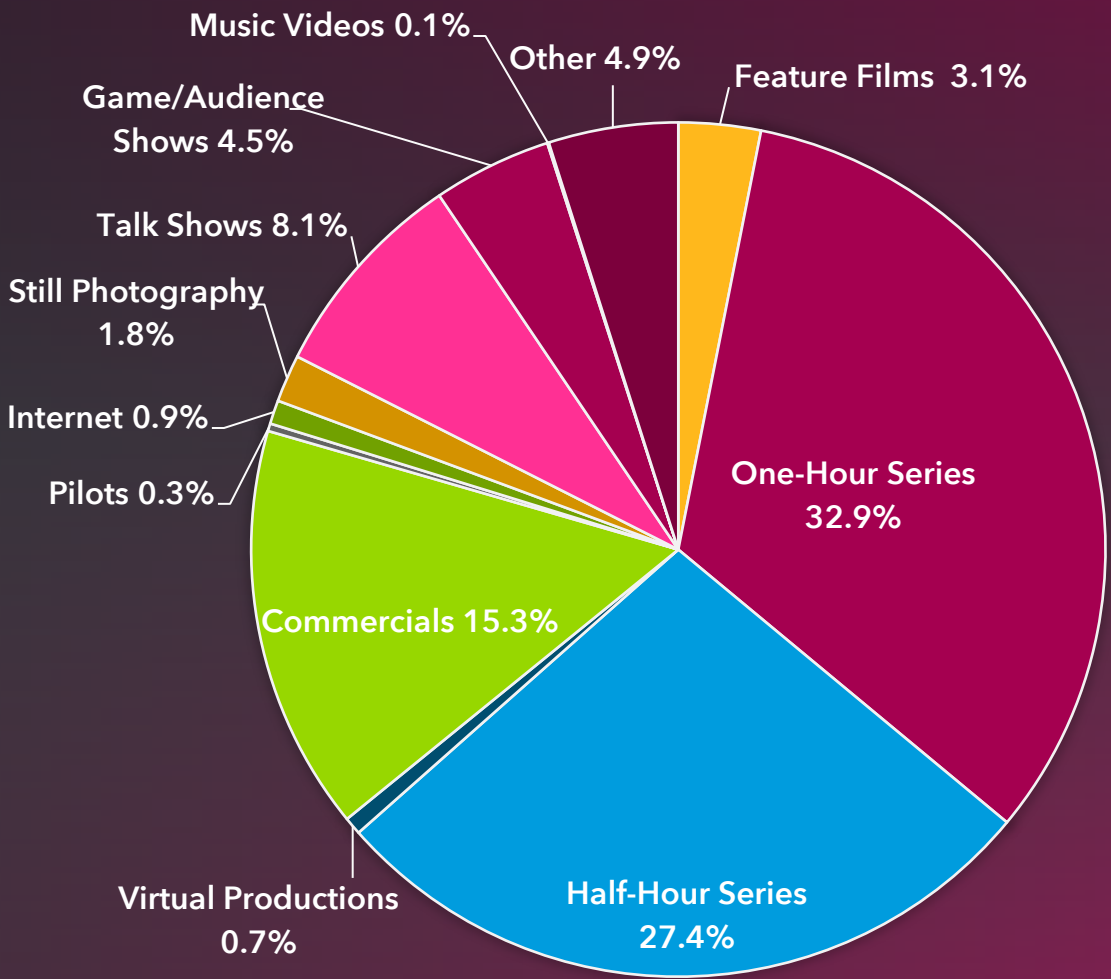
STAGE SHOOT DAYS



Comparative Annual Stage Shoot Days

Type of Production	2021	2020*	2019	2018	% Chg 2018-2021
Feature Films	367	146	293	480	-23.5%
One Hour TV Series	3887	1966	4655	6769	-42.6%
Half Hour TV Series	3240	2459	3119	3813	-15.0%
Virtual Productions	79	--	--	--	--
Commercials	1812	400	1357	903	100.7%
Pilots	34	36	92	77	-55.8%
Internet	106	141	73	76	39.5%
Still Photography	212	303	695	501	-57.7%
Talk Shows	955	297	1249	987	-3.2%
Game/Audience Shows ¹	530	--	--	--	--
Music Videos	7	13	19	6	16.7%
Other	579	430	756	879	-34.1%
Total	11808	6191	12308	14491	-18.5%

BY TYPE 2021



*NOTE: COVID-related production shutdown between March and June. ¹ This is a new category in 2021 that was previously lumped in the "other" category in years prior

BACKLOT SHOOT DAYS

Type of Production	2021	2020*	2019	2018	% Chg 2018-2021
Feature Films	187	41	93	88	112.5%
One Hour TV Series	1105	656	238	215	414.0%
Half Hour TV Series	262	422	225	228	14.9%
Virtual Productions	--	--	--	--	--
Commercials	57	81	414	408	-86.0%
Pilots	8	10	45	51	-84.3%
Internet	14	9	45	43	-67.4%
Still Photography	9	9	39	12	-25.0%
Talk Shows	102	17	275	314	-67.5%
Game/Audience Shows	0	--	--	--	--
Music Videos	7	7	24	8	-12.5%
Other	88	194	302	253	-65.2%
Total	1839	1446	1700	1620	13.5%

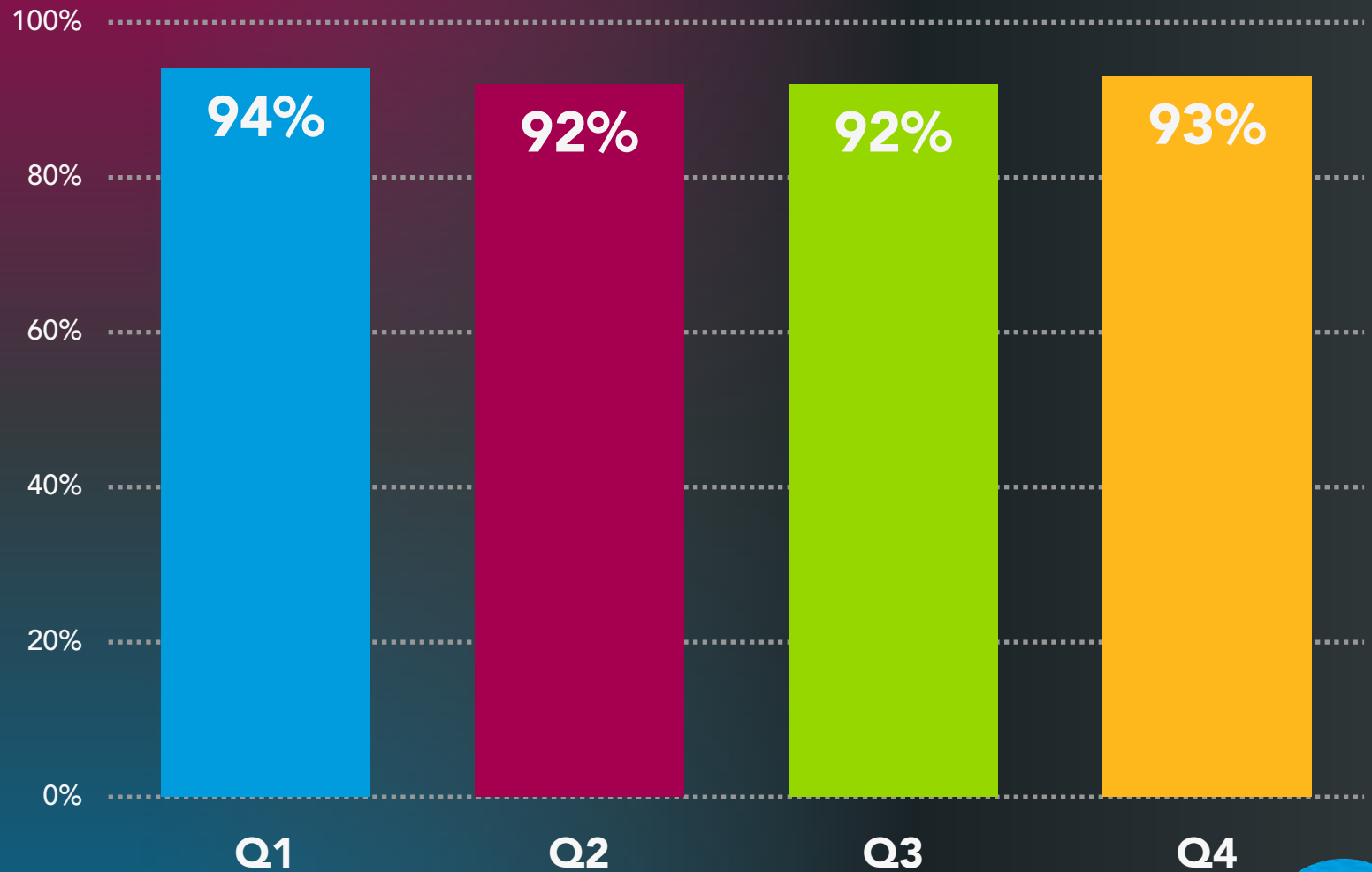


NOTE: five new studios joined in 2021, two of which had backlots. *COVID-related production shut down between March and June.

QUARTERLY OCCUPANCY 2021*

2021
AVERAGE ANNUAL
OCCUPANCY
93%

Average Annual Occupancy 2021

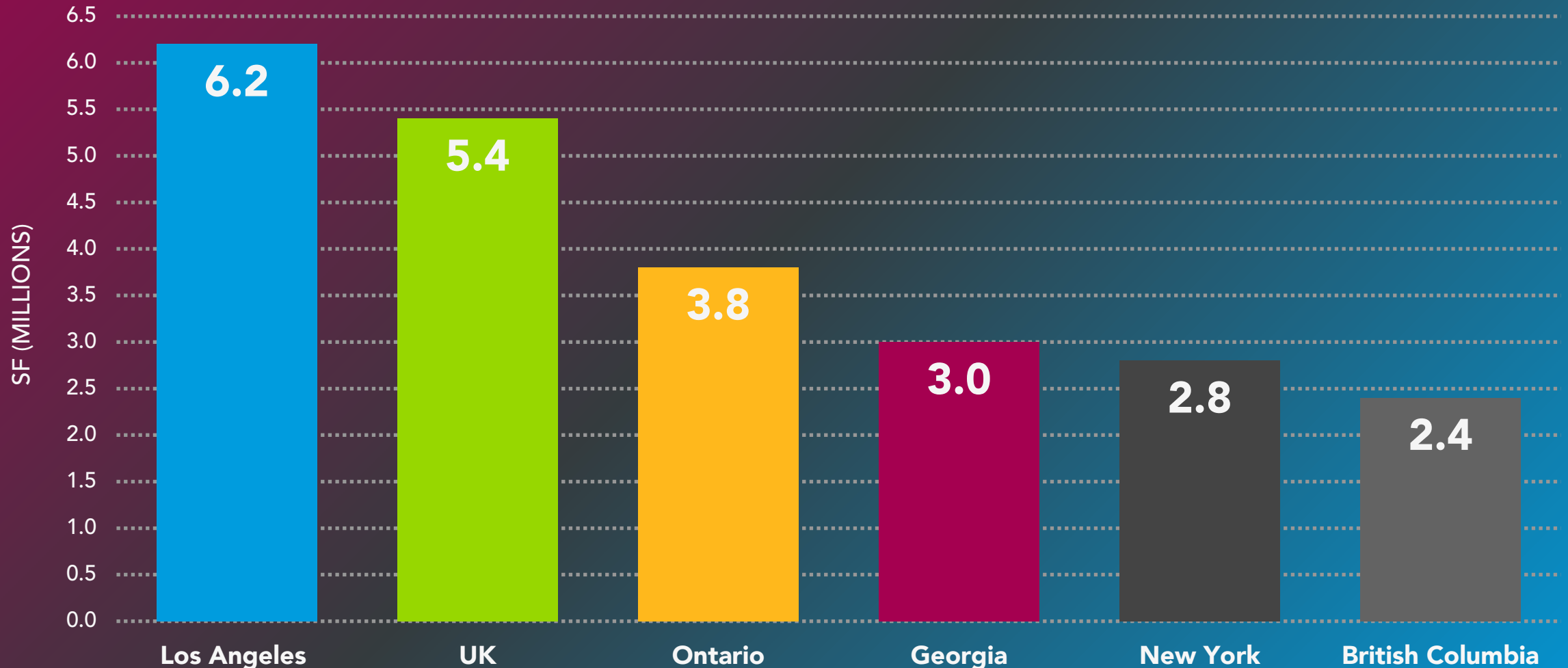


* NOTE: Occupancy pertains to the amount of time a stage was not available and is not necessarily reflective of actual utilization.

COMPETITIVE JURISDICTIONS

Film
LA

Square Feet of Stage Space (Millions)



1

PLANNED & PROPOSED STUDIOS

in LA County

Film
LA

Studio Name	Location	# New Stages	Est. SF	Opening Date
8 th & Alameda Studios	Downtown Arts District	17	TBD	Entitlement Phase
Shadowbox Studios	Santa Clarita	19	475K	Entitlement Phase
Echelon Studios	Hollywood	5	87K	Entitlement Phase Construction Starts 2023
Sunset Glenoaks	Sun Valley	7	126K	Set to Open September 2023
TVC 2050	Beverly / Fairfax District	9	TBD	Entitlement Phase
Warner Bros.	Burbank	16	320K	Construction Starts Q3 2023
Reframe Studios	Atwater Village	3	65K	Estimated Completion Late 2023
East End Studios (Mission Campus)	Boyle Heights	5	102K	Construction Starts Q3 2023
East End Studios (Griffith Park Campus)	Glendale	10	200K	Entitlement Phase
East End Studios (Glendale Campus)	Glendale	3	35K	Under Construction Open Q3 2023

2

PLANNED & PROPOSED STUDIOS

in LA County

Film
LA

Studio Name	Location	# New Stages	Est. SF	Opening Date
Alameda Crossing (7 th & Alameda)	Downtown Arts District	10	TBD	Application Filed November 2022
Sylmar Studios	Sylmar	12	300K	Started Construction 2022 / Open Mid-2024
Echelon Television Center	Hollywood	4	76K	Entitlement Phase
East End Studios (6 th & Alameda)	Downtown Arts District	16	300K	Entitlement Phase
Stocker Street Creative	Baldwin Hills-Crenshaw	5	57K	Entitlement Phase
Radford Studio Center	Studio City	2-7	TBD	Plans Recently Submitted
Fox Future	Century City	9	TBD	Application Recently Submitted

35%

SUPPLY OF
CERTIFIED
STAGES

155 STAGES

EST. 3M SQUARE FEET

CALIFORNIA FILM & TELEVISION SOUNDSTAGE FILMING PROGRAM

Beginning January 1, 2022, and before January 1, 2023, 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.

For more information & frequently asked questions on SB 144, please visit the California Film Commission's website:
<https://cdn.film.ca.gov/wp-content/uploads/2021/08/SB-144-Stage-Construction-Tax-Credit-FAQs.pdf>

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***

CONTRIBUTORS

Anne Wurts

Philip Sokoloski

DESIGN

Michelle Hawryschko



6255 W. Sunset Blvd. 12th Floor
Hollywood, CA 90028

www.FilmLA.com

 @FilmLA

 FilmLA

 FilmLAinc