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Q4 Gains Help On-Location Filming in L.A. Recover 15% in 2010

Commercial Production Surges as California Film & Television Tax Credit Prevents Feature Film Category from Hitting New Record Low

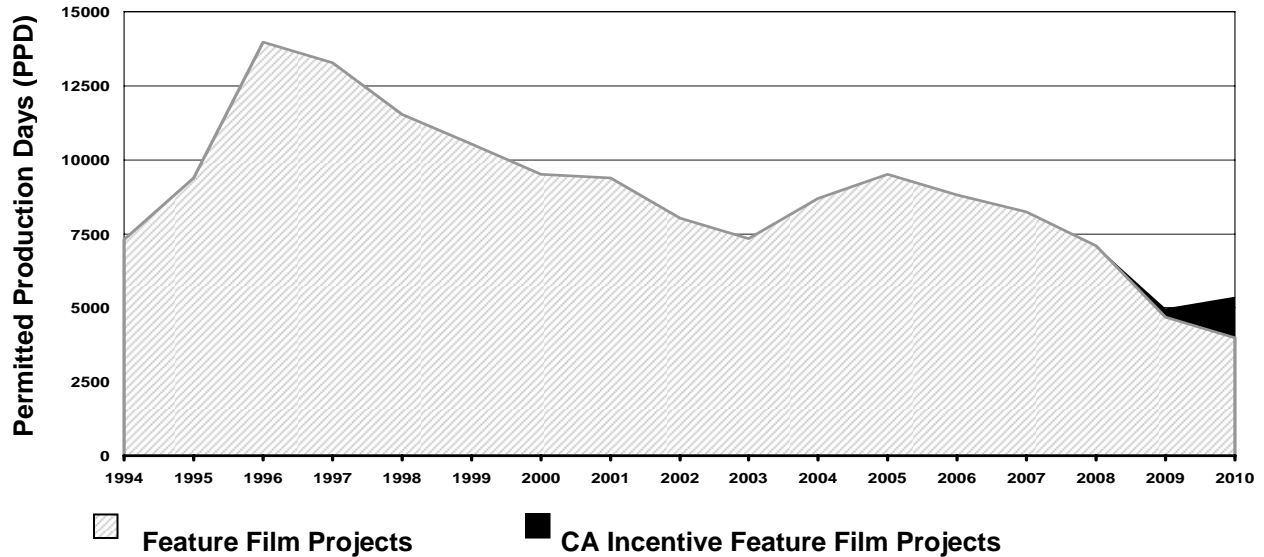
LOS ANGELES – January 11, 2011 – FilmL.A. -- the not-for-profit community benefit organization that coordinates permits for filmed entertainment shot on-location in the City of Los Angeles, unincorporated parts of Los Angeles County and other local jurisdictions -- today announced that on-location filming across all categories increased nearly 15 percent in 2010 compared to 2009, aided by unexpected surges in Television and Feature production in the fourth quarter. In all, FilmL.A. recorded 43,646 permitted production days (PPD)* in 2010 compared to 37,979 tallied in 2009.

Production of Commercials increased 28.1 percent in 2010 vs. the prior year (6,778 vs. 5,292 PPD), the category's largest year-over-year increase since tracking began in 1993. Despite a weak fourth quarter gain of just 2.5 percent, the Commercials category overcame an unsteady economy and four prior years of decline to attain its second-strongest annual showing on record. Commercial production reached its zenith in L.A. back in 2005 (6,983 PPD).

"The uptick in numbers clearly reflects the reality that the advertising industry is rebounding nicely from one of its greatest slumps in history," said Matt Miller, President and CEO, Association of Independent Commercial Producers (AICP). "Along with the growing need for video content for marketing communications, the models to fulfill these needs continue to shape this segment of the media landscape, and illustrate the importance of this sector as an important economic influencer in Southern California."

On-location Feature production posted a 28.1 percent fourth quarter gain and a year-over-year gain of 8.1 percent (5,378 PPD in 2010 vs. 4,976 in 2009). The annual increase can be wholly attributed to California's Film and Television Tax Credit. Estimates from the California Film Commission show that since program inception, incentivized projects have injected \$2 billion in direct spending into California communities, including over \$697 million in wages paid to below-the-line workers.

Annual On-Location Feature Filming in Los Angeles (in PPD)



In 2010 alone, the State program attracted dozens of new feature film projects to Los Angeles, which were responsible for 26 percent of local Feature production for the year (totaling 1,400 PPD). Were it not for these projects, 2010 would have been the worst year on record for on-location Feature filming in Los Angeles. As it stands, that record is held by the year 2009, when the Features category finished 64 percent below its historical peak (4,976 PPD in 2009 vs. 13,980 in 1996).

“The California Film and Television Tax Credit is one of many ladders to help our state climb out of the fiscal ditch we have dug for ourselves by pushing away businesses and jobs,” said state Assemblyman Cameron Smyth (R-Santa Clarita). “Here in the Legislature, we need to use the success of this tax credit as a model for how to stimulate California’s economy. I’m looking forward to working with my colleagues on both sides of the aisle to create jobs and to continue fostering a healthy environment for production in California.”

Television production posted a fourth quarter gain of 49.9 percent to recover 11.9 percent over 2009 (17,833 vs. 15,933 PPD). The recovery was fueled by only two of Television’s main subcategories. By year’s end, TV Sitcoms were up 77.9 percent and TV Reality up 46.6 percent, while TV Dramas were down 18.9 percent and TV Pilots down 8.6 percent. Changes in local programming and production schedules, elaborated upon in FilmL.A.’s Q3 production report, shifted dramas onto studio lots (making them untrackable to FilmL.A.) and single-camera sitcoms onto area streets. Incentive-qualifying productions made up just 2.6 percent (totaling 462 PPD) of L.A.’s 2010 Television total.

“On balance, the numbers are positive, and I am cautiously optimistic about 2011. Hopefully, with FilmL.A.’s new “Film Works” marketing campaign and the California Film & Television Tax Credit, our state and region will win back entertainment projects and jobs once taken for granted,” said FilmL.A. President Paul Audley.

About FilmL.A.

Founded in 1995, FilmL.A. is a private, not-for-profit community benefit organization that coordinates and processes permits for on-location motion picture, television and commercial production under contract to an ever increasing roster of public-sector clients in the Los Angeles region. Our organization works to strike a balance between the needs and interests of the entertainment industry and the neighborhoods affected by on-location production. Ongoing community relations is a key component of the service FilmL.A. provides. In today's highly competitive, global entertainment production market, FilmL.A.'s services help the Los Angeles region retain its status as the entertainment production capital of the world.

* On-location production figures are based on days of permitted production within the jurisdictions served by FilmL.A. One permitted production day (PPD) is defined as a single crew's permission to film a single project at a single defined location during any given 24-hour period. This data does not include production that occurs on certified sound stages or on-location in jurisdictions not served by FilmL.A. Overall figures include production of feature films, television programs, commercials, documentaries, industrial videos, infomercials, music videos, still photography, student films and miscellaneous production.



On-Location Production Report Updated: 01.11.11

About this Report

This report is the product of independent research conducted by FilmL.A., a private, not-for-profit community benefit organization that coordinates and processes permits for on-location motion picture, television and commercial production under contract to an ever-increasing roster of public-sector clients in the Los Angeles region.

Although film production activity can be measured in a variety of ways, our preferred unit of measure is the permitted production day (PPD). One PPD is defined as a single crew's permission to film a single project, at a single defined location, during any given 24-hour period.

In addition to researching matters of interest to entertainment industry leaders and local government representatives, FilmL.A. offers counsel to local governments on how to enhance the environment for filming in the greater Los Angeles region.

Ongoing community relations is a key component of the service FilmL.A. provides. The organization works to strike a balance between the needs and interests of the entertainment industry and the neighborhoods affected by on-location production.

In today's highly competitive, global entertainment production market, our services help the Los Angeles region retain its status as the entertainment production capital of the world.

NOTE: FilmL.A. updated its production tracking tools at the beginning of 2008. This adjustment significantly changed how FilmL.A. tracks and reports on local production activity. We therefore caution against making direct comparisons between this data and data published in older FilmL.A. reports (1993-2007).

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Recent Permitted Production Days (PPD) by Type

	Q1	Q2	Q3	Q4	TOTAL (YTD)
Features					▲ 8.1%
- 2009	921	1,383	1,485	1,187	4,976
- 2010	929	1,542	1,387	1,520	5,378
- Year/Year Diff.	0.9%	11.5%	-6.6%	28.1%	
Television					▲ 11.9%
- 2009	4,279	3,998	4,432	3,224	15,933
- 2010	4,881	4,052	4,068	4,832	17,833
- Year/Year Diff.	14.1%	1.4%	-8.2%	49.9%	
Commercials					▲ 28.1%
- 2009	1,266	1,193	1,215	1,618	5,292
- 2010	2,034	1,604	1,481	1,659	6,778
- Year/Year Diff.	60.7%	34.5%	21.9%	2.5%	
Others					▲ 16.0%
- 2009	2,942	3,023	2,548	3,265	11,778
- 2010	3,243	3,936	2,777	3,701	13,657
- Year/Year Diff.	10.2%	30.2%	9.0%	13.4%	
TOTAL (All Categories)					▲ 14.9%
- 2009	9,408	9,597	9,680	9,294	37,979
- 2010	11,087	11,134	9,713	11,712	43,646
- Year/Year Diff.	17.8%	16.0%	0.3%	26.0%	

Recent PPD for Top Television Subcategories

	Q1	Q2	Q3	Q4	TOTAL (YTD)
TV Drama					▼ 18.9%
- 2009	1,556	1,221	2,136	1,241	6,154
- 2010	1,298	755	1,420	1,519	4,992
- Year/Year Diff.	-16.6%	-38.2%	-33.5%	22.4%	
TV Sitcom					▲ 77.9%
- 2009	216	193	246	208	863
- 2010	203	286	366	680	1,535
- Year/Year Diff.	-6.0%	48.2%	48.8%	226.9%	
TV Reality					▲ 46.6%
- 2009	1,497	1,366	1,226	918	5,007
- 2010	2,063	2,016	1,523	1,739	7,341
- Year/Year Diff.	37.8%	47.6%	24.2%	89.4%	
TV Pilot					▼ 8.6%
- 2009	254	309	112	127	802
- 2010	361	177	52	143	733
- Year/Year Diff.	42.1%	-42.7%	-53.6%	12.6%	