



**2015**

PRODUCTION RETROSPECTIVE



# ABOUT THIS REPORT

This report is the product of independent research conducted by FilmL.A, Inc. FilmL.A. is Los Angeles' regional film office, serving the City and County of Los Angeles and an ever-increasing roster of local municipalities. Providing streamlined permit processing, comprehensive community relations, marketing services, film policy analysis and more to these jurisdictions, FilmL.A. works to attract and retain film production in Greater Los Angeles.

Integral to FilmL.A.'s work is ongoing research into the benefits that local filming brings to the Los Angeles region. To that end, the company maintains an internal research division — FilmL.A. Research — devoted to the production, collection and dissemination of information regarding the U.S. film production economy and global production trends.

This report aggregates 5 years of film permit-derived data to present an overview of on-location film production in Greater Los Angeles. The report is divided into topic sections addressing the most seriously-studied production genres in individual detail.

On behalf of everyone at FilmL.A. and those who depend on local entertainment production for their livelihoods, we thank you for your interest in this report. If you have any questions about the content herein, the authors welcome your inquiries.



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# TABLE OF CONTENTS

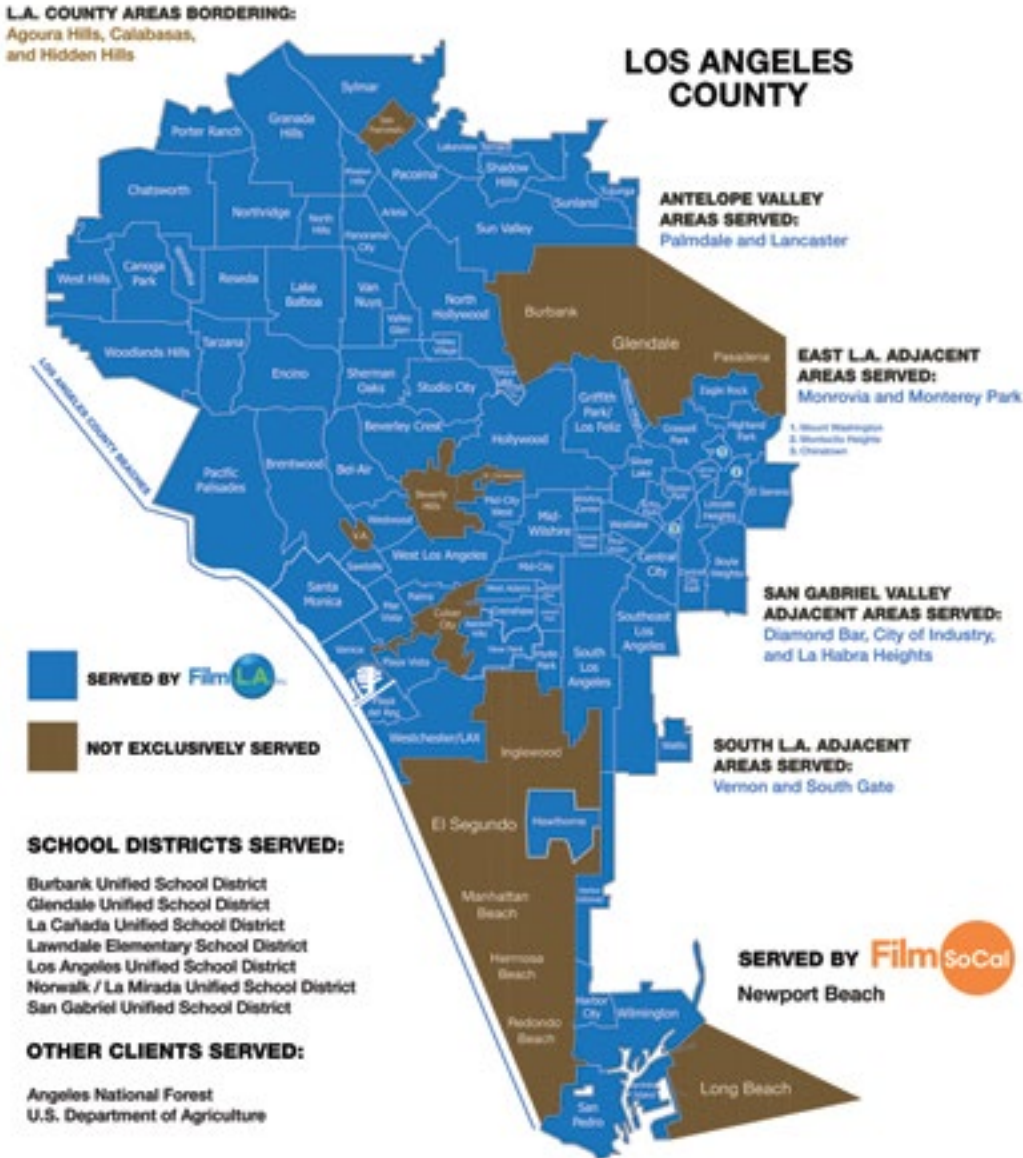
PRODUCTION TRACKING METHODOLOGY .....	2
FEATURE FILMS .....	3
TELEVISION .....	5
COMMERCIALS .....	6
OTHER / MISC. ....	7
TV DRAMAS .....	8
TV COMEDIES .....	10
TV REALITY .....	11
TV PILOTS .....	12
WEB-BASED TV .....	13
<b>OVERALL L.A. PRODUCTION TRENDS .....</b>	<b>14</b>
ANNUAL SHOOT DAYS (TABLES) .....	15
ANNUAL SHOOT DAYS: TV SUBCATEGORIES (TABLES) .....	16
<b>ANNUAL SHOOT DAYS: 5 YEAR TOTALS (TABLE) .....</b>	<b>17</b>

# PRODUCTION TRACKING METHODOLOGY

## Measurement Method: Shoot Days (SD)

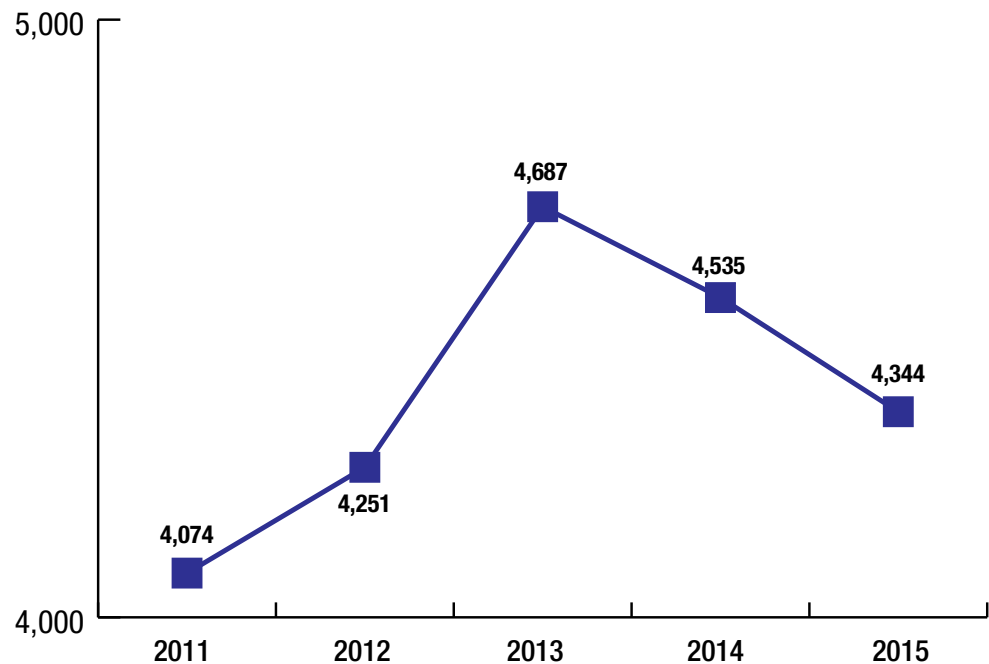
A Shoot Day (SD) is defined as one crew’s permission to film at **one or more defined locations within our service jurisdictions** (see map below), during all or part of any given 24-hour period. This measure is used to quantify how many days of work film crews perform during a given time period. Determining SD involves looking at all calendar days during which filming occurs, and summing the number of **unique permits** simultaneously active for filming on each day.

## AREAS SERVED



## PRODUCTION TRENDS BY GENRE: FEATURE FILMS

This production category includes all feature film projects, regardless of project budget or project duration, that filmed on-location using a FilmL.A. coordinated permit. The category contains both studio and independent projects. It does not include student films.



### CATEGORY ANALYSIS

- In 2015, L.A. area on-location Feature production **decreased 4.2 percent** compared to the previous year (4,344 vs. 4,535), as measured in total Shoot Days (SD).
- For 2015, on-location Feature production was **down .8 percent** compared to the category's five-year rolling average.



# PRODUCTION TRENDS BY GENRE:

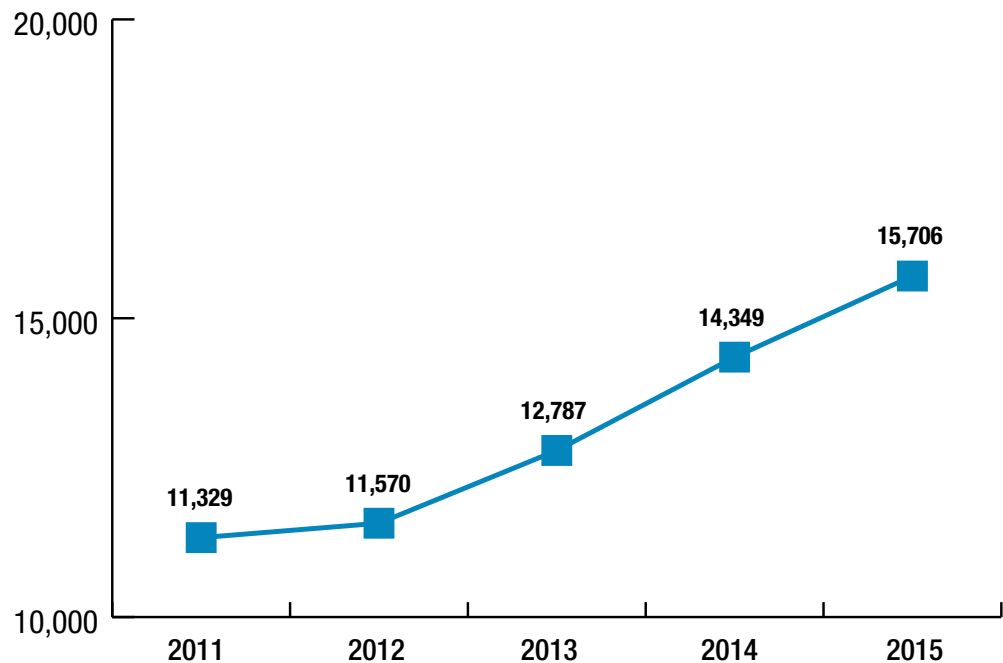
## FEATURE FILMS (CONT.)

- Local on-location Feature production peaked in 1996, just as the first film incentive programs were pioneered in Canada. L.A.'s steep decline in Feature production is primarily due to the loss of film projects to out of state competition. A total of 36 U.S. states and two dozen countries now have programs in place to lure Feature projects away from California.
- The 2009 introduction of the California Film & Television Tax Credit has also helped bolster local Feature production levels. Were it not for the program's existence, 2010 would have surpassed 2009 as the category's worst year on record. However, the original California film incentive was hampered by a \$100 million annual cap. By the end of the original incentive program in 2014/15, roughly 90 percent of film tax credits were dedicated to ongoing television series under the program.
- Under the new California Film & Television Tax Credit 2.0 Program, which took effect in 2015, the annual cap of available film tax credits was increased from \$100 million to \$330 million. In addition, the new program allocates credits for different types of production. Under the new program, a total of \$115.5 million is dedicated to feature film projects each year, thus guaranteeing a consistent supply of available credits to new film projects each year.
- The first allocation of tax credits to feature film projects under the California Film & Television Tax Credit 2.0 Program took place in July of 2015, when 11 feature films were approved for the incentive. At the close of 2015, only two of the 11 features selected for the incentive had begun production.
- Despite an overall decline for features, especially big-budget studio features, the two projects selected over the summer for tax credits under the new program (*CHiPs* and *The Conjuring 2*), in addition to feature films selected for tax credits in the final year of the original incentive program (*Rebirth*, *The Sentence*, and *The Disaster Artist*), registered 101 SDs in the fourth quarter of 2015. The incentivized feature films shooting in the fourth quarter of 2015 accounted for 9.4 percent of total SDs in the category.



## PRODUCTION TRENDS BY GENRE: TELEVISION (AGGREGATE)

This production category includes all television projects, whether intended for distribution via network, cable or internet channels that filmed on-location using a FilmL.A. coordinated permit. The Television category aggregates the main TV subcategories of TV Drama, TV Comedy, TV Reality, TV Pilot, and Web-Based TV, as well as lesser-studied television types.



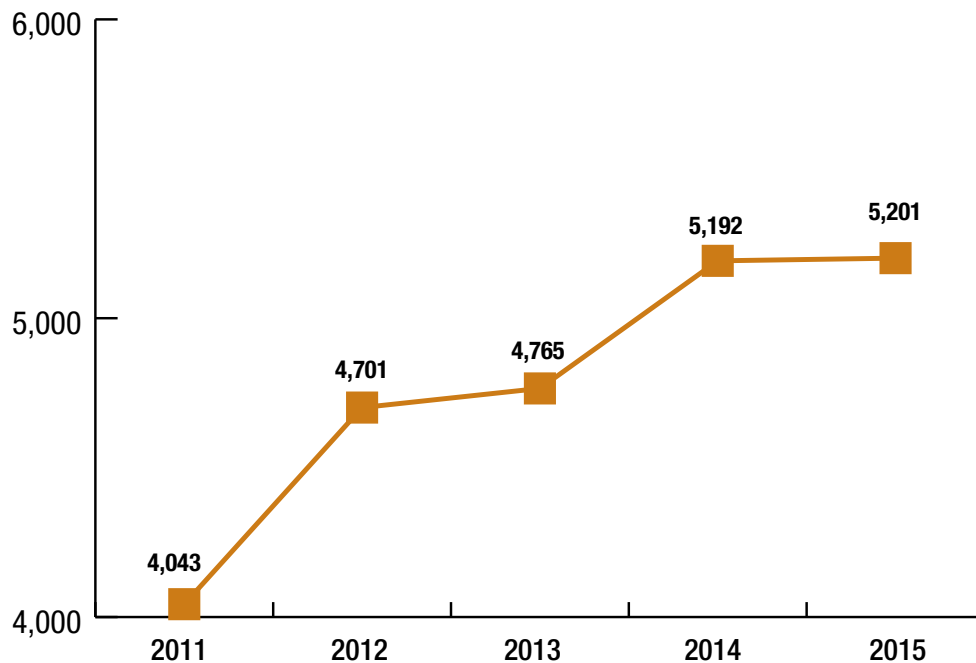
### CATEGORY ANALYSIS

- In 2015, L.A. area on-location Television production **increased 9.5 percent** compared to the previous year (15,706 vs. 14,349), as measured in total Shoot Days (SD).
- For 2015, on-location Television production was **up 19.4 percent** compared to the category's five-year rolling average.
- Television production continues to be a growth industry in Los Angeles. Even as Feature films were being lured away by film incentive programs, growth in the local Television market continued to provide jobs for Los Angeles talent and crews.
- From 1993-2007, growth in local Television production followed an increase in the number of new cable channels and service providers. In recent years, the emergence of digital players like Netflix & Amazon® and the introduction of original content on premium and basic cable channels, created demand for new product that benefited the Los Angeles Television production economy.
- In 2015, the main drivers of growth in the Television category were scripted Dramas and Comedies. The explosive growth of this scripted content more than made up for an 8 percent decline in Reality TV production.

# PRODUCTION TRENDS BY GENRE:

## COMMERCIALS

This production category includes all projects created for the promotion of a product, service or cause, that filmed on-location using a FilmL.A. coordinated permit. The category contains standard commercials produced under contract with an advertising agency, as well as “spec” commercials, public service announcements (PSAs) and commercials for web display.

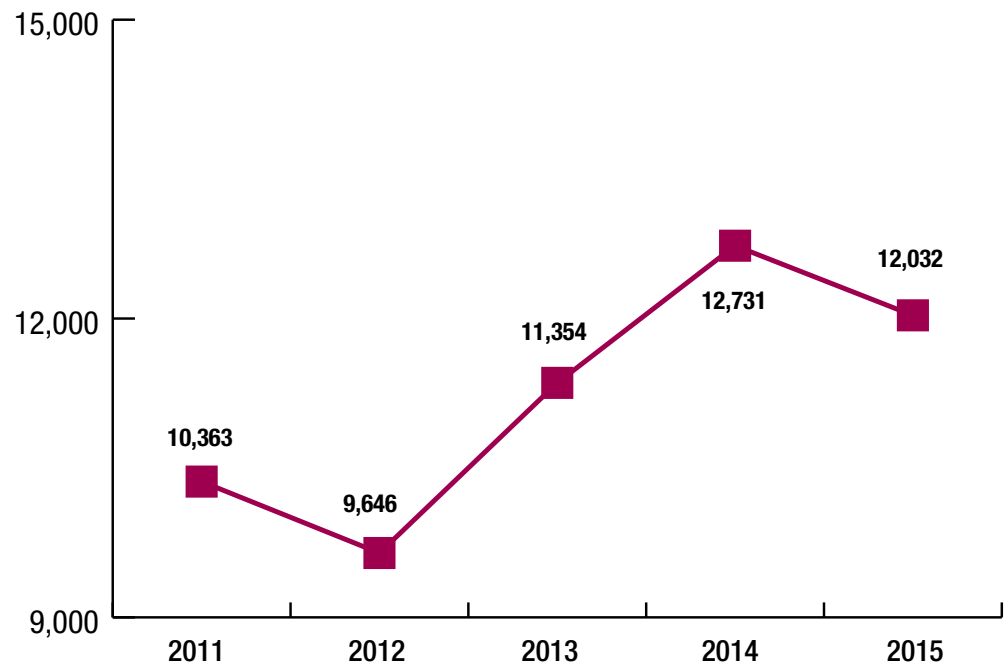


### CATEGORY ANALYSIS

- In 2015, L.A. area on-location Commercial production **increased .2 percent** compared to the previous year (5,201 vs. 5,192), as measured in total Shoot Days (SD).
- For 2015, on-location Commercial production was **up 8.8 percent** compared to the category’s five-year rolling average.
- In 2014, according to the Association of Independent Commercial Producers (AICP), commercial production spending in California reached a record high of \$2.06 billion.
- With 5,201 SDs in 2015, Commercials are now the second largest local production category behind Television production.
- Over the past few years, FilmL.A. has observed substantial growth in the production of commercials for web-based distribution. From 2011 to 2015, local production of internet-based commercials increased 159 percent, rising from 321 annual Shoot Days (2011) to 832 (2015). This reflects a profound change in the commercial production market. Increased broadband connectivity, coupled with the proliferation of smart phones, tablets and other media consumption devices, has created promising new opportunities for online advertising.

## PRODUCTION TRENDS BY GENRE: OTHER / MISCELLANEOUS

This is a catch-all category for all of the lesser-studied forms of on-location production in Los Angeles. Production in this category includes, but is not limited to: still photography, student films, music videos, adult films and industrial videos. This category also includes projects described to FilmL.A. as “miscellaneous” by their creators.



### CATEGORY ANALYSIS

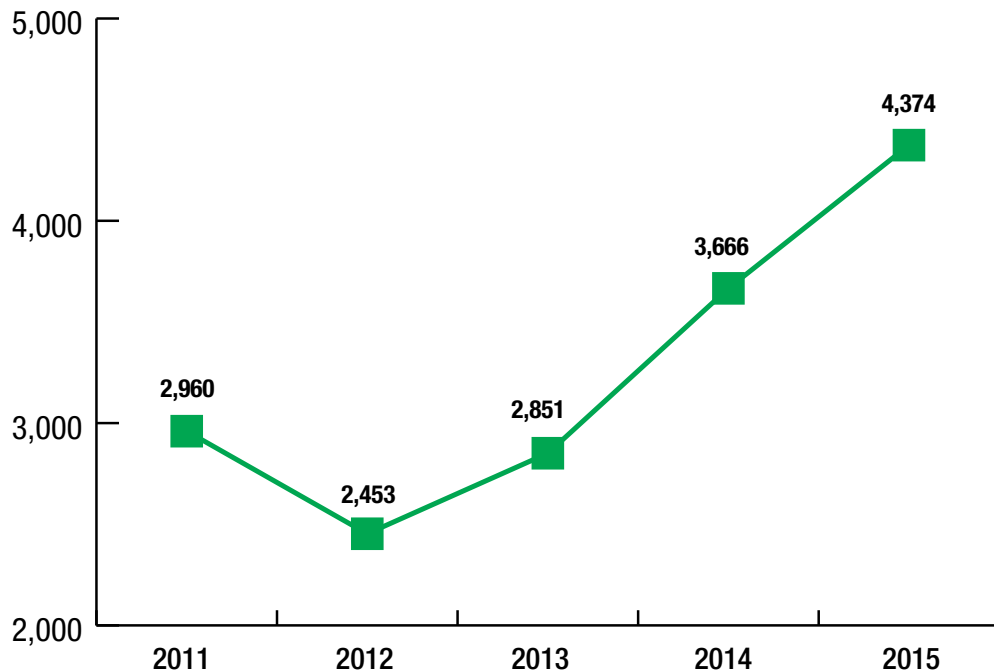
- In 2015, L.A. area on-location production in the “Other” category **decreased 5.5 percent** compared to the previous year (12,032 vs. 12,731), as measured in total Shoot Days (SD).
- For 2015, on-location Other production was **up 5.8 percent** compared to the category’s five-year rolling average.
- Permits for still photography and student filmmaking are the biggest contributors to Shoot Day counts in the Other production category.
- Much of the production falling into this category can be considered “low-value” from an economic impact standpoint.



# PRODUCTION TRENDS BY SUB-GENRE:

## TV DRAMAS

This is a subcategory of the Television production category. This subcategory includes all scripted television projects of one hour in duration, intended for distribution via broadcast and cable networks and filmed on-location using a FilmL.A. coordinated permit. The category does not include TV Pilot projects, TV Sitcom nor Web-Based TV projects, which are tracked separately.



### CATEGORY ANALYSIS

- In 2015, L.A. area on-location Television Drama production **increased 19.3 percent** compared to the previous year (4,374 vs. 3,666), as measured in total Shoot Days (SD).
- For 2015, on-location Television Drama production was **up 34.1 percent** compared to the category's five-year rolling average.
- TV Drama production is considered the most economically lucrative form of television production, with many series spending \$50 million per-season or higher. For example, one of the new Drama series shooting in California under the state's enhanced film incentive is HBO's upcoming *Westworld*, which has a first season budget of \$88 million. Dramas offer long-term employment prospects, providing financial stability for locally-employed crews and support vendors.
- 2012 was the worst year on record for local TV Drama production in Los Angeles (see "Pilot Production Report," from FilmL.A. Research). This was caused by the cancellation of several long-running L.A. based series, in addition new series bypassing California to film in other locations offering lucrative incentives.

SHOOT DAYS

# PRODUCTION TRENDS BY SUB-GENRE:

## TV DRAMAS (CONT.)

- By 2015, however, the L.A. region witnessed a spectacular turnaround. In just three years, L.A. went from having the worst year on record for on-location Drama production to the best year in over 20 years of FilmL.A. tracking. From 2012 to 2015, on-location Drama production increased 78 percent. The driving force behind the recovery is a massive increase in orders for new content, the arrival of aggressive nontraditional media players like Netflix and Amazon® and the availability of the California Film & Television Tax Credit.
- In 2015, Drama series receiving the California Film & Television Tax Credit accounted for 887 SDs, which represents 20 percent of total activity in the category. As FilmL.A. Research noted in the 2015 Pilot Production Report, 22 of the 53 Drama series then-surveyed received tax credits.
- With the arrival of the enhanced Tax Credit 2.0 Program in 2015, California was able reverse runaway production by enticing several series shooting outside the state to relocate. Drama series that relocated to California due to the enhanced film incentive include *American Horror Story* (Louisiana), *Secrets & Lies* (North Carolina) and *Mistresses* (British Columbia).
- With over 50 Drama series calling California home in 2015, FilmL.A. Research estimated an economic impact of \$2.7 billion from direct production spending, which supports 18,000 full-time jobs in the state (see “2015 Pilot Production Report,” from FilmL.A. Research).

On the set of the FX drama, *American Horror Story: Hotel*, located in Los Angeles

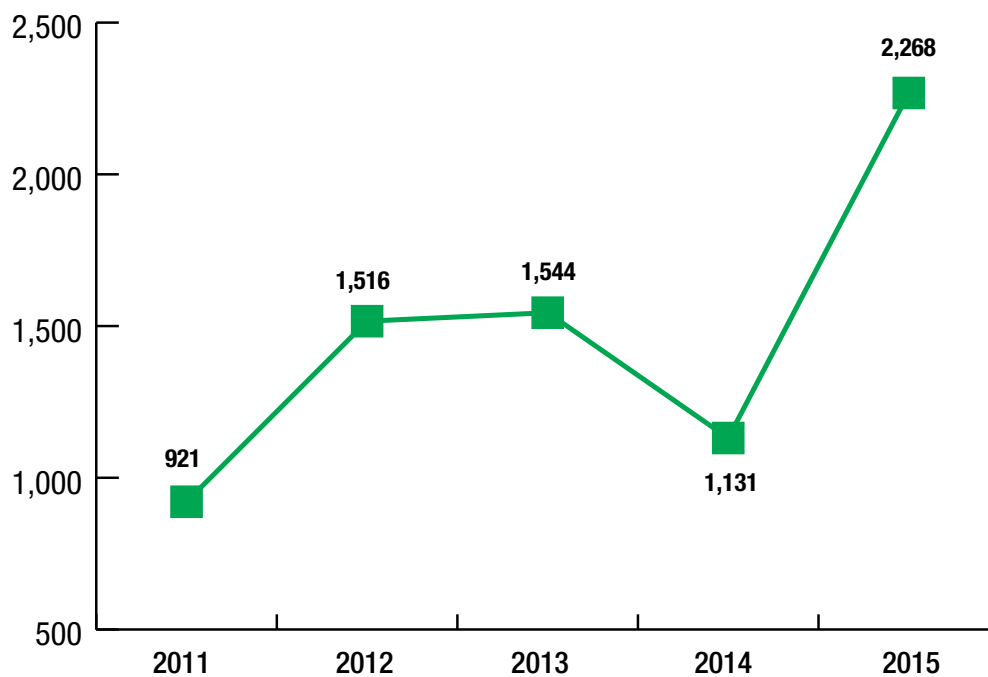


# PRODUCTION TRENDS BY SUB-GENRE:

## TV COMEDIES

This is a subcategory of the Television production category. This subcategory includes all scripted television projects of one half-hour in duration, intended for distribution via broadcast and cable networks and filmed on-location using a FilmL.A. coordinated permit. It does not include TV Pilot projects, nor Web-Based TV projects, which are tracked separately.

TV Comedies come in two forms – single-camera and multi-camera shows. Of these, only single camera shows spend any significant amount of time shooting on location whereas multi-camera shows may never leave the studio lot.



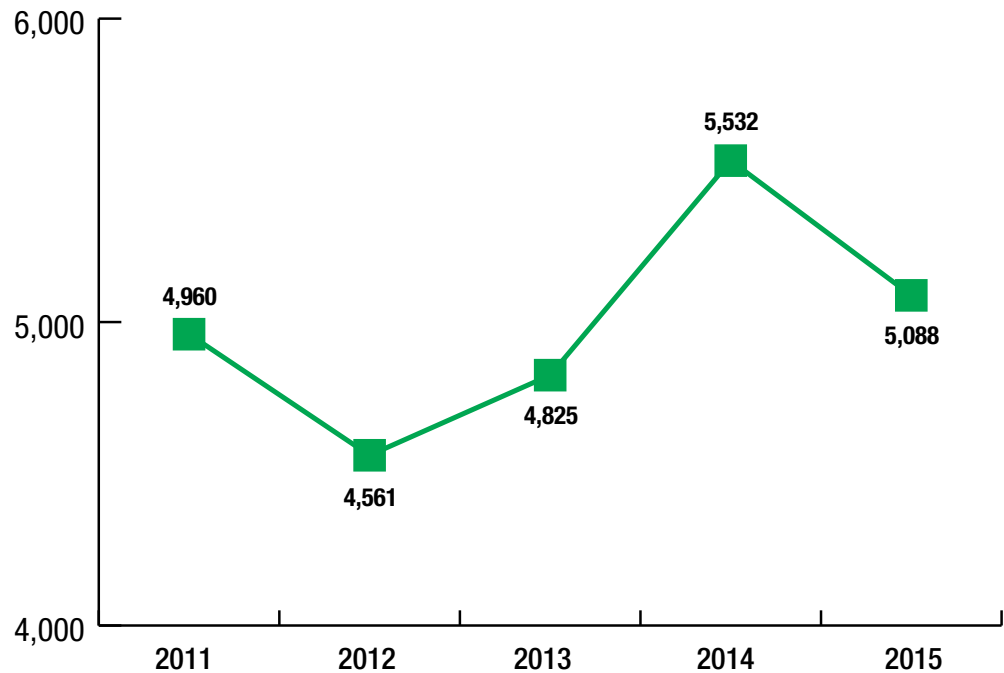
### CATEGORY ANALYSIS

- In 2015, L.A. area on-location Television Comedy production **increased 100.5 percent** compared to the previous year (2,268 vs. 1,131), as measured in total Shoot Days (SD).
- For 2015, on-location Television Comedy production was **up 53.6 percent** compared to the category's five-year rolling average.
- TV Comedy production is considered the second most economically lucrative form of television production. The majority of new half-hour series in L.A. are single-camera shows, which have a larger economic impact than stage-bound multi-camera sitcoms. For example, HBO's *Veep*, which relocated to California from Maryland due to the new California Film & Television Tax Credit 2.0 Program, will spend \$49 million in the state while producing its fifth season.
- Other examples of single-camera half-hour series include *Grandfathered*, *Love*, *Casual*, *Togetherness*, *Transparent* and *Life in Pieces*.
- In recent years, there has been an explosion of half-hour series shooting in the region. In 2010/11, there were approximately 52 half-hour scripted series shooting in the L.A. region; by the close of 2015 that number swelled to over 100 comedy series.

SHOOT DAYS

## PRODUCTION TRENDS BY SUB-GENRE: TV REALITY

This is a subcategory of the Television production category. This subcategory includes a diverse array of unscripted television projects filmed on-location using a FilmL.A. coordinated permit. This subcategory does not include TV Pilot projects, TV Sitcom, TV Drama nor Web-Based TV projects, which are tracked separately.

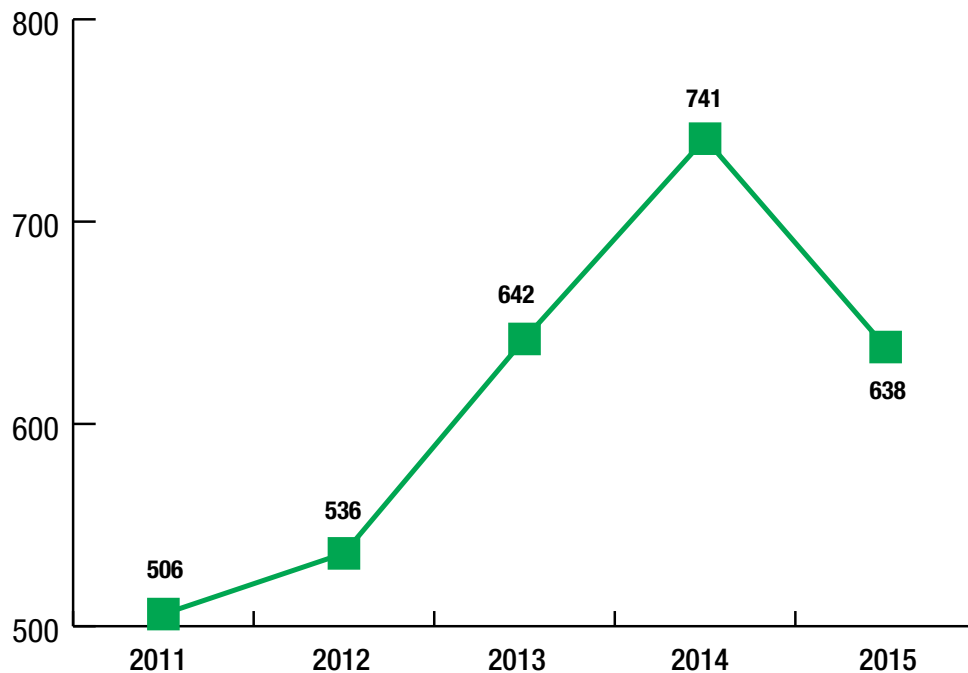


### CATEGORY ANALYSIS

- In 2015, L.A. area on-location Television Reality production **decreased 8 percent** compared to the previous year (5,088 vs. 5,532), as measured in total Shoot Days (SD).
- For 2015, on-location Television Sitcom production was **up 1.9 percent** compared to the category's five-year rolling average.
- TV Reality production surged in Los Angeles beginning in 2002. It is still the biggest contributor to local on-location Television production, but has been losing ground to scripted television series over the past year.
- Generally speaking, Reality Television projects typically have smaller economic footprints than Television Dramas or Television Sitcoms. Crews and cast are usually small and comparatively less time is spent setting up for and filming each Reality Television episode.

# PRODUCTION TRENDS BY SUB-GENRE: TV PILOTS

This is a subcategory of the Television production category. This subcategory includes all original scripted television pilots and shorter-length presentations, of any duration, intended to air on a broadcast network, cable network, or online and filmed on-location using a FilmL.A. coordinated permit.



SHOOT DAYS

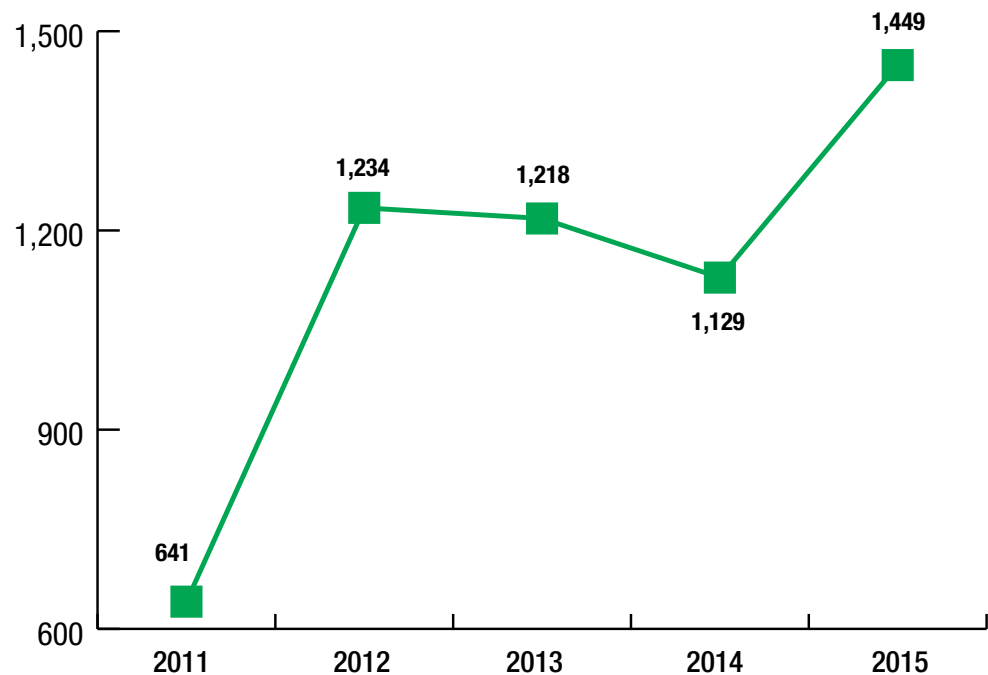
## CATEGORY ANALYSIS

- In 2015, L.A. area on-location Television Pilot production **decreased 13.9 percent** compared to the previous year (638 vs. 741), as measured in total Shoot Days (SD).
- For 2014, on-location Television Pilot production was **up 4.1 percent** compared to the category's five-year rolling average.
- For the past ten years, FilmL.A. Research has published comprehensive "Television Pilot Production Reports". These reports offer a robust look at local TV Pilot production in Los Angeles and competing jurisdictions, and are essential reading for anyone interested in this topic.
- The desire for original programming on many cable networks and online streaming services like Netflix and Amazon resulted 202 pilots to be produced in the 2014/2015 pilot development cycle, one less than the record 203 produced in L.A. the prior year.
- In 2015, under the California Film & Television Tax Credit 2.0 Program, TV Pilots were allowed to apply for California's film incentive for the first time. They were ineligible under the original program. In the last two quarters of 2015 (the first quarters where pilots could apply for the incentive), projects receiving tax credits accounted for 22.6 percent of SDs in the category.



## PRODUCTION TRENDS BY SUB-GENRE: WEB-BASED TV

This is a subcategory of the Television production category. This subcategory includes all scripted and non-scripted content of any duration intended for distribution via the internet and filmed on-location using a FilmL.A. coordinated permit. Episodic and non-episodic projects are included without differentiation.

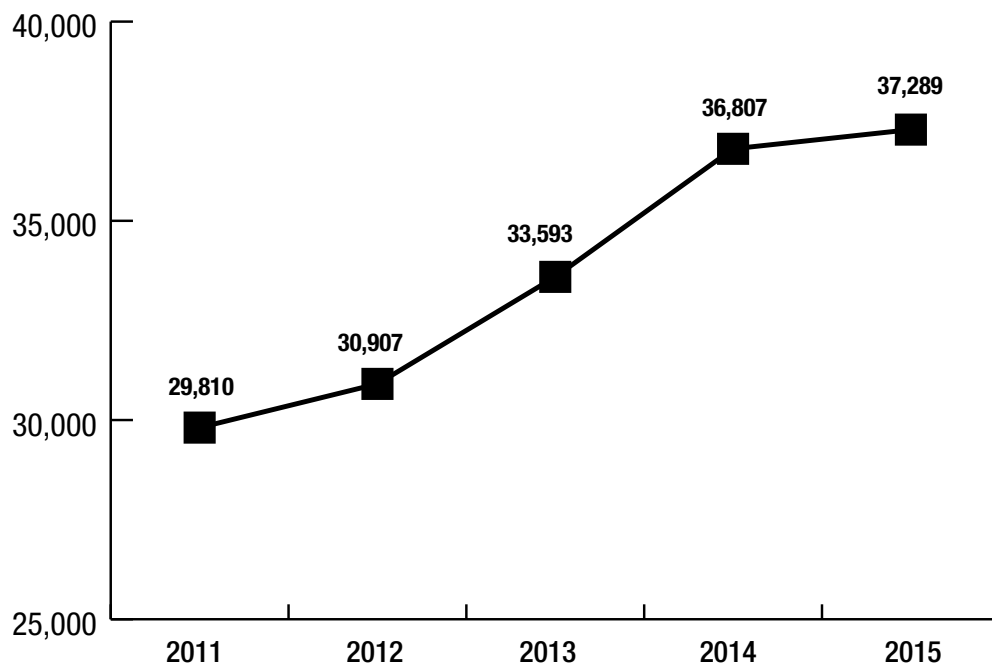


### CATEGORY ANALYSIS

- In 2015, L.A. area on-location Web-Based Television production **increased 28.3 percent** compared to the previous year (1,449 vs. 1,129), as measured in total Shoot Days (SD).
- For 2015, on-location Web-Based Television production was **up 27.7 percent** compared to the category's five-year rolling average.
- Web-Based TV is FilmL.A.'s newest tracking category. The category was created in anticipation of an increase in Web-Based TV production in Los Angeles. Since its introduction, the category has exploded. From 2011-2015, production in this category increased 126 percent.
- FilmL.A. officials believe local Web-Based TV totals are understated. Many new media entrepreneurs are unfamiliar with local rules regarding commercial filming and the need to secure film permits. As these projects are brought into compliance, tracked Web-Based TV production should increase.

# OVERALL L.A. PRODUCTION TRENDS

In one sense, aggregating film production data across all filming categories presents a distorted view of filming in Los Angeles. When analyzing FilmL.A. data, it is important to note that no two days of filming are alike! The economic and neighborhood impact between two Shoot Days (SD) can be profound, even within a single filming category. To aggregate data is to ignore these important differences. Nonetheless, it is interesting to know how many Shoot Days the Greater Los Angeles Region hosts on an annual basis. Below is the result over the last five years:



SHOOT DAYS

## OVERALL ANALYSIS

- In 2015, overall L.A. area on-location production **increased 1.3 percent** compared to the previous year (37,289 vs. 36,807), as measured in total Shoot Days (SD). That's an **increase of 10.7 percent** for the region over the 5-year rolling average.

# ANNUAL SHOOT DAYS:

## FEATURES:

PERIOD	2011	2012	2013	2014	2015
Q1	633	739	780	1,094	926
Q2	1,027	1,195	1,180	1,188	1,193
Q3	1,559	1,235	1,387	1,288	1,146
Q4	855	1,082	1,340	965	1,079
<b>TOTAL</b>	<b>4,074</b>	<b>4,251</b>	<b>4,687</b>	<b>4,535</b>	<b>4,344</b>

## TELEVISION (AGGREGATE):

PERIOD	2011	2012	2013	2014	2015
Q1	2,942	2,965	3,315	3,257	3,312
Q2	2,738	2,294	2,993	3,922	4,033
Q3	2,824	3,029	2,963	3,860	4,308
Q4	2,825	3,282	3,516	3,310	4,059
<b>TOTAL</b>	<b>11,329</b>	<b>11,570</b>	<b>12,787</b>	<b>14,349</b>	<b>15,712</b>

## COMMERCIALS:

PERIOD	2011	2012	2013	2014	2015
Q1	1,195	1,401	1,294	1,351	1,435
Q2	851	1,076	1,091	1,346	1,248
Q3	973	960	1,157	1,151	1,278
Q4	1,024	1,264	1,223	1,344	1,240
<b>TOTAL</b>	<b>4,043</b>	<b>4,701</b>	<b>4,765</b>	<b>5,192</b>	<b>5,201</b>

## OTHER:

PERIOD	2011	2012	2013	2014	2015
Q1	2,698	2,707	2,715	3,280	3,034
Q2	2,671	2,635	2,749	3,118	2,922
Q3	2,146	2,201	2,589	2,863	2,778
Q4	2,848	2,842	3,301	3,470	3,298
<b>TOTAL</b>	<b>10,363</b>	<b>10,385</b>	<b>11,354</b>	<b>12,731</b>	<b>12,032</b>

# ANNUAL SHOOT DAYS: TELEVISION SUB-CATEGORIES

## TV DRAMAS:

PERIOD	2011	2012	2013	2014	2015
Q1	813	707	832	816	1,058
Q2	656	397	537	894	1,004
Q3	797	630	721	958	1,187
Q4	694	719	761	998	1,125
<b>TOTAL</b>	<b>2,960</b>	<b>2,453</b>	<b>2,851</b>	<b>3,666</b>	<b>4,374</b>

## TV SITCOMS:

PERIOD	2011	2012	2013	2014	2015
Q1	235	355	391	357	304
Q2	120	207	242	260	505
Q3	284	477	377	278	745
Q4	282	477	534	236	714
<b>TOTAL</b>	<b>921</b>	<b>1,516</b>	<b>1,544</b>	<b>1,131</b>	<b>2,268</b>

## TV PILOTS:

PERIOD	2011	2012	2013	2014	2015
Q1	249	245	284	319	257
Q2	131	145	206	196	147
Q3	63	40	70	95	125
Q4	63	106	82	131	109
<b>TOTAL</b>	<b>506</b>	<b>536</b>	<b>642</b>	<b>741</b>	<b>638</b>

## TV REALITY:

PERIOD	2011	2012	2013	2014	2015
Q1	1,237	1,132	1,101	1,039	1,245
Q2	1,276	1,032	1,178	1,646	1,420
Q3	1,287	1,167	1,096	1,578	1,259
Q4	1,160	1,230	1,450	1,269	1,164
<b>TOTAL</b>	<b>4,960</b>	<b>4,561</b>	<b>4,825</b>	<b>5,532</b>	<b>5,088</b>

## WEB-BASED TV:

PERIOD	2011	2012	2013	2014	2015
Q1	117	255	328	230	202
Q2	179	220	383	326	437
Q3	103	348	247	301	378
Q4	242	411	260	272	432
<b>TOTAL</b>	<b>641</b>	<b>1,234</b>	<b>1,218</b>	<b>1,129</b>	<b>1,449</b>

# ANNUAL SHOOT DAYS: 5 YEAR TOTALS

## TOTAL:

PERIOD	2011	2012	2013	2014	2015
Q1	7,468	7,812	8,104	8,982	8,707
Q2	7,287	7,200	8,013	9,574	9,396
Q3	7,502	7,425	8,096	9,162	9,510
Q4	7,553	8,470	9,380	9,089	9,676
<b>TOTAL</b>	<b>29,810</b>	<b>30,907</b>	<b>33,593</b>	<b>36,807</b>	<b>37,289</b>





# MORE FROM **Film L.A.** RESEARCH

Visit [filmla.com](http://filmla.com) to see additional reports from FilmL.A. Research, including the “2014 Feature Film Study” and the “2015 Pilot Production Report”. Both studies are available as downloadable PDF files.

## 2014 FEATURE FILM STUDY



## 2015 PILOT PRODUCTION REPORT





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