



SOUND STAGE PRODUCTION REPORT



“This report reveals a portion of the Los Angeles production picture that has until now gone unviewed. We hope that the availability of this data, and our plans to expand it through new studio partnerships, will be an asset to business leaders and policymakers, and further public understanding of L.A.’s signature industry and the wide employment and economic benefits it brings.”

- **Paul Audley**, *President of FilmL.A.*





PHOTO: Sunset Gower Studios®



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TABLE OF CONTENTS

INTRODUCTION 2

CERTIFIED SOUND STAGES IN GREATER LOS ANGELES 3

OTHER NON-CERTIFIED PRODUCTION SPACES 3

SHOOT DAYS ON STUDIO SOUND STAGES AND BACKLOTS 4

TRENDS IN SOUND STAGE FILMING 5

TRENDS IN BACKLOT FILMING 7

TRENDS IN SOUND STAGE OCCUPANCY 8

PROJECT COUNTS BY PRODUCTION CATEGORY 8

SOUND STAGES AND STUDIO INFRASTRUCTURE IN NORTH AMERICA ... 9

CONCLUSION 12

INTRODUCTION

For more than 20 years, FilmL.A. has conducted an ongoing study of on-location filming in the Greater Los Angeles area. Drawing on data from film permits it coordinates, FilmL.A. publishes detailed quarterly updates on local film production, covering categories like Feature Films, Television Dramas and Commercials, among others. The availability of this data helps inform the film industry, Los Angeles area residents and state and local public officials of the overall health of California’s signature industry. Few other film offices track local film production as thoroughly as FilmL.A. does. But as informative as FilmL.A.’s reports are, they have always told only one part of the story.

When not filming on-location, many productions also shoot on sound stages. Sound stages are purpose-built facilities constructed specifically for use in film, television and commercial production. Los Angeles is home to many certified sound stages – hundreds, in fact – and until the release of this report, none of the filming taking place on them could be tracked or reported on publicly.

To fill in this incomplete picture, FilmL.A. has engaged film and television studios from across the region in a limited data sharing partnership. Under the agreement, FilmL.A. will receive regular updates regarding sound stage and backlot occupancy and use from partner studios, and will aggregate this information to protect anonymity and client confidentiality.

At the time of this writing, a total of 12 studio partners are enrolled in the data sharing partnership. Recruitment of new partners is ongoing. Beginning in 2018, FilmL.A. will begin regular bi-annual reporting on the number of Shoot Days occurring on certified sound stages. In addition to capturing stage shoot days, FilmL.A. is also collecting project counts, stage utilization and occupancy information, all of which are discussed later in this report.

This report provides preliminary data and analysis from the 12 initial studio partners for calendar year 2016 and also provides an overview of the current sound stage infrastructure in Greater Los Angeles, as well as a brief look at the current state of competing production infrastructure in other North American locations.

PARTICIPATING STAGES:



CERTIFIED SOUND STAGES IN GREATER LOS ANGELES

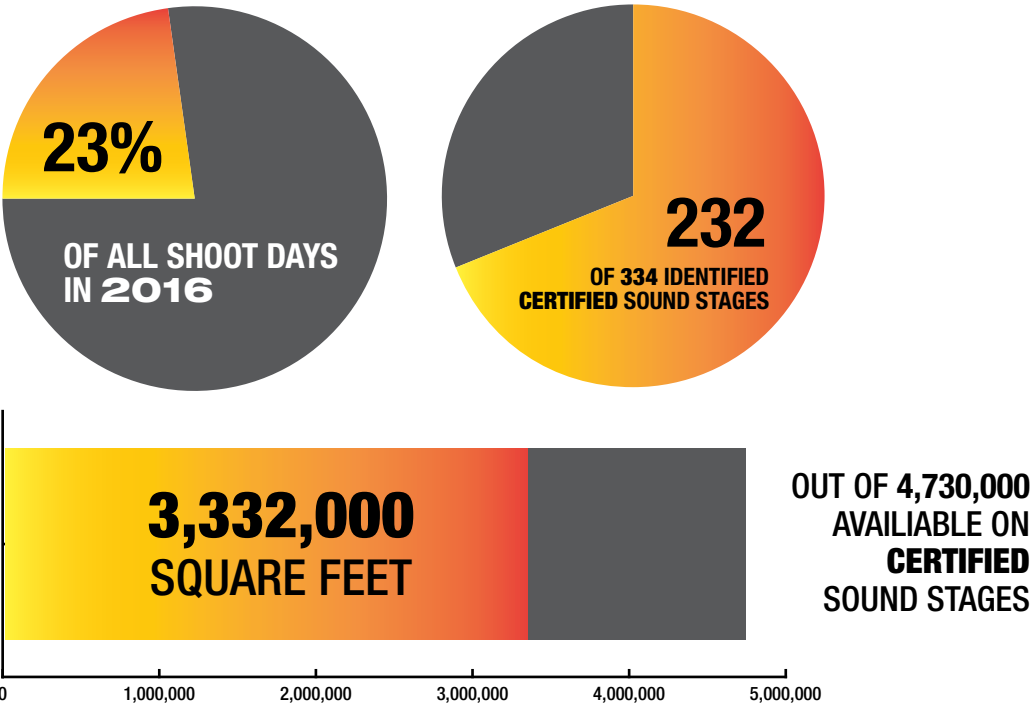
This report concerns itself with film production on certified sound stages only. Generally speaking, a sound stage is a purpose-built facility designed for indoor filming. In Los Angeles, sound stages are certified by government authorities to meet certain specifications for fire detection, fire suppression, electrical installation, and equipment use, among other requirements.

Working from a variety of sources, including the Los Angeles Fire Department, Los Angeles County Fire Department, The Creative Handbook, Variety 411 and other publications, FilmL.A. has identified at least 334 certified sound stages operating in the Greater Los Angeles Region. This count is based on best-available public information and is subject to change as tracking continues.

It is worth mentioning that making an accurate count of certified sound stages is difficult. Certification standards and public recordkeeping vary by local government jurisdiction. Complicating the count, today there are several studios in the middle of modernization projects, which will see older stages torn down to make room for new stages or studio facilities.

The 334 certified sound stages identified by FilmL.A. represent a combined total of 4,730,000 square feet of production space. The studio partners who contributed data for this report control 232 certified sound stages, or 70 percent of the known certified sound stages in the region by property count.

These 232 sound stages also have a combined total of 3,332,000 square feet of production space. The average size of the 232 partner studio sound stages was 14,230 square feet, with the largest stage in the sample sized at 41,985 square feet and the smallest at just over 1,000 square feet.



OTHER, NON-CERTIFIED PRODUCTION SPACES

In addition to hundreds of certified sound stages, Greater Los Angeles is also home to hundreds of non-certified production facilities. These facilities range from empty warehouses to buildings that house floors of permanent standing sets for generic locations like hospitals, police stations and courtrooms.

While a permit may or may not be required in such facilities (they are required in FilmL.A.'s permit jurisdictions) these production spaces are often included in industry directories of area stage and studio facilities. FilmL.A. estimates that these non-certified facilities represent an additional 1 million square feet of dedicated production space.

SHOOT DAYS ON STUDIO SOUND STAGES AND BACKLOTS

FilmL.A. defines a shoot day as one crew's permission to film at one or more defined locations during all or part of a given 24 hour period. This measure determines how many days of work film crews perform during a given time period. Similarly, FilmL.A. defines a Stage Shoot Day as the number of days a stage(s) is used for actual filming by a production.

Note that a Stage Shoot Day is distinct from a booked stage day, which is when a stage is being rented by a production or other tenant regardless of whether filming or other activity is taking place. For example, a feature film that books a stage for five days and only films on it for one would create one stage shoot day and five booked stage days. A booked stage day is used to determine the occupancy rate, which is discussed later in this report.

In 2016, FilmL.A.'s studio partners reported a total of 9,610 stage shoot days on their stages. In addition to these, studios with backlots registered an additional 2,241 backlot shoot days, for a combined total of 11,851 shoot days.

SHOOT DAYS: STAGE VS. BACKLOT

PRODUCTION TYPE	ALL STAGE + BACKLOT	STAGE ONLY	BACKLOT ONLY
Feature Films	436	266	170
One Hour Series	4,983	4,371	612
Half Hour Series	3,340	2,830	510
Commercials	458	307	151
Pilot	131	98	33
Internet / Digital	8	2	6
Still Photography	70	25	45
Talk Show	1,560	1,254	306
Music Video	7	5	2
Other	858	452	406
TOTAL SHOOT DAYS	11,851	9,610	2,241

Adding these shoot days to the 39,605 on-location shoot days reported by FilmL.A., the region hosted at least 51,456 total shoot days in 2016. The previously untracked filming activity occurring on the partner studio lots accounts for 23 percent of last year's total.

PHOTO: Raleigh Studios®

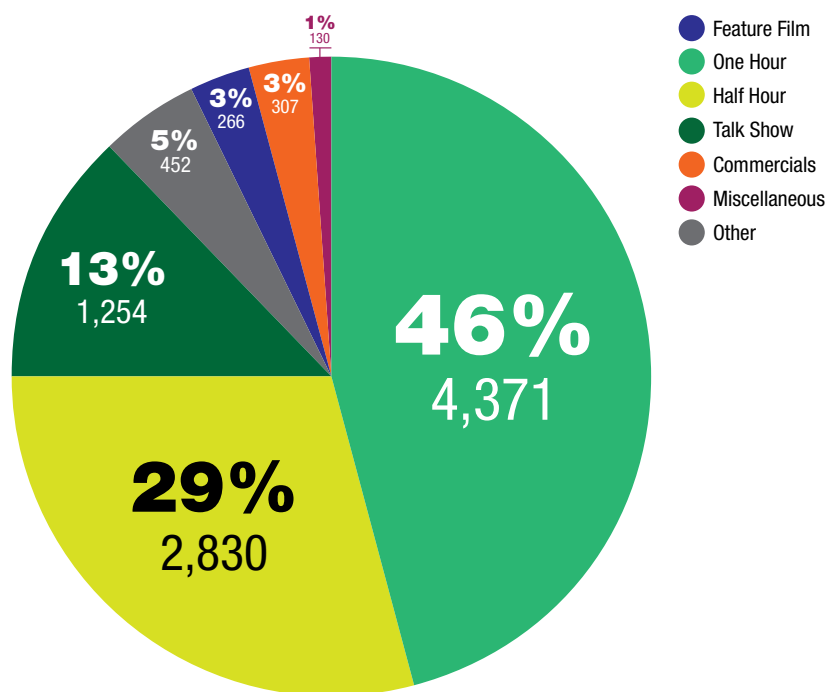


TRENDS IN SOUND STAGE FILMING

For filming that took place on certified sound stages in 2016, the overwhelming number of shoot days were for scripted television (including both one-hour and half-hour series), which accounted for 75 percent of all stage shoot days in 2016.

One-hour TV Dramas, with 4,371 shoot days, account for almost half of the stage activity. Half-hour TV Comedy series, with 2,830 shoot days, came in second behind Dramas, with almost a third of total stage shoot days in 2016.

TOP L.A. SOUND STAGE SHOOT DAY PRODUCTION TYPES IN 2016



Although few in number compared to the dozens of scripted series that are based in greater Los Angeles, TV Talk Shows were the third leading production category shooting on certified stages in 2016, with 1,254 shoot days. The relatively high number of shoot days for a comparatively small number of projects (in relation to the number of L.A. based scripted series) is a result of the format. Many talk shows air on a daily basis. A talk show will tape more than 160 episodes each year, filming on the show's main stage for every episode, almost without exception.

A half-hour series on the other hand, may shoot for as few as 60 days in a season, with many shoot days occurring entirely on-location. Depending on the number of episodes, a one-hour drama will film anywhere from 60 days to over 150 days each season. Depending on the script and the nature of the show, a series may spend 7 days filming on-location and only one day on stage or vice-versa.

The "Other" category accounted for 452 stage shoot days in 2016. This category is made up of various activities like camera tests and promotional spots, but most of these utilized days were for special events.

Commercials accounted for 307 stage shoot days in 2016. While commercials are generally extremely short in duration (sometimes filmed within just a single day) and have much lower budgets than the larger categories, they still accounted for more activity than Feature Films in 2016, which had 266 stage shoot days.

The remaining filming categories reflected in the data included TV Pilots (98 shoot days), Still Photos (25 shoot days), Music Videos (5 shoot days) and Internet / Digital (2 shoot days). Collectively, these are represented in the "Miscellaneous" section of the chart above.



TRENDS IN BACKLOT FILMING

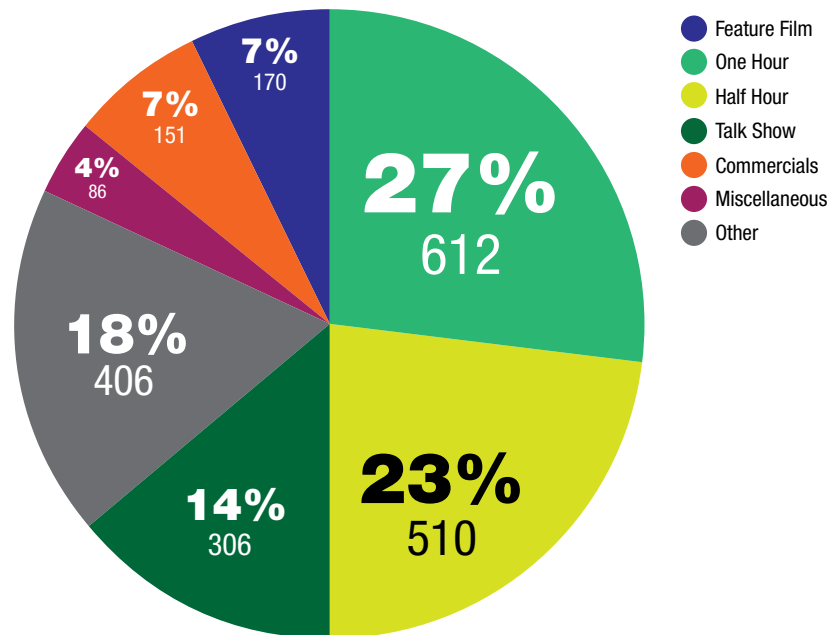
A backlot is an area or areas adjoining the main buildings and stages on a studio lot that contain permanent exterior buildings for outdoor scenes or space for temporary set construction. When wholly contained on land owned by studio partners, filming on backlots does not usually require a permit. For this study, FilmL.A. tracks filming on studio backlots separately from production taking place on certified sound stages. Since most of FilmL.A.'s partner studios have extremely limited or no backlot space, the level of analysis for backlots is not as deep as for stage activity.

While scripted one-hour and half-hour series were the top two categories utilizing backlots for filming in 2016, they accounted for just 50 percent of the backlot shoot days compared to 75 percent of stage shoot days.

The Other category, which was dominated by private or promotional events, represents almost a fifth of all activity that took place on backlots in 2016, followed by talk shows, feature films and commercials.

Lastly, the Miscellaneous category in the chart below represents music videos, still photos, internet / digital and pilots.

TOP L.A. STUDIO BACKLOT SHOOT DAY PRODUCTION TYPES IN 2016



TRENDS IN SOUND STAGE OCCUPANCY

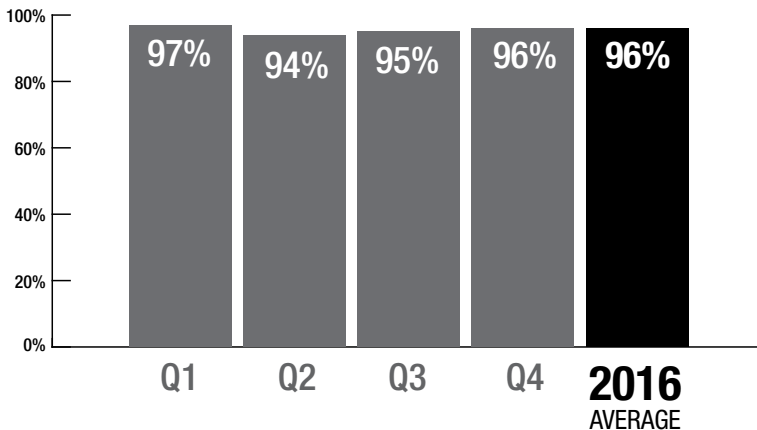
As mentioned earlier in this report, sound stage occupancy is determined by dividing the number of available stage days in a given quarter by the number of days the stages are actually booked. Since the prevailing practice at area studios is to use only weekdays in this calculation, the occupancy rate in a given quarter can exceed 100 percent if a production or an event is using a studio on the weekends.

Further, since a stage can be fully booked for a month by a production that chooses not film on it during that time, it's not uncommon for a studio to report 100 percent occupancy and zero shoot days for the same period.

Viewed strictly from a sales perspective, high occupancy is a good thing for studios as it means there are more paying tenants than not, regardless of how they are utilizing the space. And from this perspective, 2016 was a very good year. For the entire year, the occupancy rate at the 12 initial studio partners averaged 96 percent in 2016.

On a quarterly basis, the first quarter of 2016 had the highest occupancy at 97 percent, followed by the fourth (96 percent) and third (95 percent) quarters. The second quarter, at 94 percent, saw the lowest occupancy rate in 2016. This is unsurprising, as this time of year is typically when network television shows take a short summer break (or "hiatus") in production.

L.A. OCCUPANCY RATES OF CERTIFIED SOUND STAGES IN 2016



PROJECT COUNTS BY PRODUCTION CATEGORY

NUMBER OF L.A. PROJECTS THAT FILMED AT STUDIOS IN 2016, BY TYPE

PRODUCTION TYPE	COUNT
Feature Films	81
One Hour Series	185
Half Hour Series	169
Commercials	236
Pilot	37
Internet / Digital	14
Still Photography	38
Talk Show	61
Music Video	4
Other	264
TOTAL	1,089

FilmL.A. also asked studio partners to quantify and categorize the number of projects (or paying studio clients) they hosted during the study period.

In terms of total projects hosted, the Other category led with 264 projects (composed primarily of events, live broadcasts and promos). Commercials were a close second, with 236 projects followed by one-hour and half-hour series, with 185 projects and 169 projects respectively.

No other category had more than 100 total projects in 2016.

SOUND STAGES AND STUDIO INFRASTRUCTURE IN NORTH AMERICA

Compared to its closest competitors in North America, the Greater Los Angeles region and California as a whole are in a very strong position when it comes to studio infrastructure and sound stage inventory.

At the more than 440 production facilities in Greater L.A. (including the 334 certified sound stages FilmL.A. has identified), the region offers roughly 5.7 million square feet of production space.

From a square footage perspective, this is nearly as much as California's top five North American competitors (New York, British Columbia, Georgia, Ontario, Louisiana) combined.

Working from a variety of sources, including the Creative Handbook, Variety 411 and studio/stage lists maintained by film commissions in British Columbia, Ontario, New York, Georgia and Louisiana, FilmL.A. created a working inventory of stages and studio space in these jurisdictions.

LOCATION	SOUND STAGES / PRODUCTION FACILITIES	COMBINED SQUARE FEET
British Columbia	86 (47 sound stages)	1,754,000
Ontario	120 (89 sound stages)	1,400,000
New York	178 (105 sound stages)	1,223,000
Georgia	78 (60 sound stages)	1,221,000
Louisiana	32	436,000

LOS ANGELES:

Over the past decade, the number of new, purpose-built certified sound stages opened in Southern California can be counted on two hands. Nonetheless, studio operators continue to expand their investments in California. Foremost among these developments are long-term expansions at two of the largest studios in Southern California: NBCUniversal and Paramount.

In late 2016, NBCUniversal completed work on a new facility dubbed Area 51 with two 18,000 square foot sound stages. The new stages, which are the first new sound stages built on the NBCUniversal lot in almost 50 years, also have an attached three-story production building, which contains makeup areas, dressing rooms, production office space, a full broadcast operations center, editing suites and graphics rooms. To get extra bang for its buck, one of the edifices on the new stage facility at NBCUniversal resembles a New York City street façade for on-site exterior filming.

Currently under construction at NBCUniversal is an additional sound stage complex called Area 71. When complete, the new complex will house four additional sound stages (18,000 square feet each) and two four-story production office buildings (40,000 square feet each), which will house amenities similar to the Area 51 complex.

Paramount Studios first announced an overhaul plan for its studio lot in Hollywood in 2011. In late 2016, the Los Angeles City Council approved Paramount's plan, which will add almost 1.4 million square feet of floor space to the studio. Among other changes, the plan calls for the demolition of some current stages (including four 5,000 square foot sound stages) and the construction of five new sound stages of 20,000-plus square feet. While the project will result in a net loss of sound stages (from 30 to 27), the larger size of the newer stages means a net increase in the amount of square feet for production space.¹

Most recently, Warner Bros. broke ground on a new sound stage on their Burbank lot in 2017. The new 18,040 square foot stage is due to be operational by June 2018 and will be the 36th stage on the Warner Bros. lot.

Outside of the major studios, Line 204 Studios has plans for a large 10 acre studio complex in Sun Valley in 2018. Once complete Line 204 Studios in Sun Valley will boast 240,000 square feet of office and stage space. The new studio in Sun Valley will complement Line 204's four existing stages (including two stages opened in 2017) in Hollywood, which offer a combined total of almost 40,000 square feet of production space and 10,000 square feet of production office space.

Earlier this year, Amazon Studios announced it was moving from Santa Monica on the storied Culver City Studios lot, which is also undergoing a modernization project. The Culver Studios project will see a net reduction in the number of major sound stages on the lot, but a net gain in production space with the addition of over 400,000 net square feet of new construction for production offices, media stages and studio space that caters to internet and new media. Nine of Culver Studio's older stages will be replaced with eight state of the art digital media stages.

Close to Culver Studios, Apple is continuing its foray into content creation with the potential creation a new studio home in an 85,000 square foot facility that was once home to Modern Props, which has since moved to the San Fernando Valley.² Apple is moving into the original content space to compete with traditional studios and streaming services like Netflix and Amazon. In August, Apple announced plans to spend "around \$1 billion" creating its own content in 2018.³

¹ <https://la.curbed.com/2016/7/21/12193556/paramount-expansion-tower-planning-commission>

² <https://therealdeal.com/la/2017/10/10/apple-in-talks-to-lease-hackmans-la-cienega-expo-project-sources/>

³ <https://techcrunch.com/2017/08/16/apple-said-to-be-spending-1-billion-on-original-content-in-2018/>

SOUND STAGES AND STUDIO INFRASTRUCTURE IN NORTH AMERICA (CONTINUED)

NEW YORK:

With a storied film industry older even than California's, New York has for decades served as the second largest production center in the United States after Los Angeles. When large film tax incentive programs were popularized in the early 2000s, New York, like California, was hit hard by runaway production. However, unlike California, New York was quick to enact an incentive of its own in 2004.

As New York's Empire State Film Production Tax Credit Program evolved over the years, the state made using local film industry infrastructure a key requirement for access to the program. In order to receive New York's film incentive, a production must shoot at least some portion at a "qualified production facility" in New York, which includes all of the purpose-built sound stages in the state.⁴

In New York City, there are four major studios: Silvercup Studios, Steiner Studios, Kaufman Astoria Studios and Broadway Stages. The production boom in New York has spurred these studios, and others, to expand their footprint in the state to keep up with demand. For example:

In 2013, Kaufman Astoria Studios opened a 35,000 square foot backlot, making it the only studio in New York City with such facilities.

In 2016, Silvercup Studios opened a new studio in the South Bronx, which boasts four stages and just over 54,000 square feet of production space.

Steiner Studios at the Brooklyn Navy Yard, which currently houses 10 sound stages, is currently building six new stages and has future plans for at least 11 more.⁵

GEORGIA:

No jurisdiction in North America has seen faster growth of new film industry studio infrastructure than Georgia. Since launching a competitive film incentive program in 2008, the growth of the film industry in the Peach State has been significant. While many of the facilities in Georgia are warehouses converted to service film productions, the state is now home to roughly 60 purpose-built stages.

In 2014, Pinewood Studios Atlanta opened the largest movie studio complex outside of California, with 700 acres of land just outside Atlanta. As of 2017, the studio boasts 18 sound stages, with 361,000 square feet of production space. In October 2016, the Atlanta Business Journal called Pinewood Studios the "unofficial home in Georgia" for Marvel Studios, which films many of its films there.⁶

In 2015, Eagle Rock Studios opened a four stage facility in Atlanta with over 120,000 square feet of production space.

In 2017, Blackhall Studios opened a studio in Atlanta with nine sound stages offering over 200,000 square feet of production space.

Tyler Perry Studios also has plans for up to 16 sound stages on 330 acres of land once home to Fort McPherson.

BRITISH COLUMBIA:

One of the first jurisdictions in the world to offer large film incentives in the form of refundable tax credits, British Columbia has spent decades cultivating a film industry workforce that presently numbers almost 30,000.⁷

With a content boom for scripted television series in recent years, combined with a 25 percent drop in the value of the Canadian dollar (on top of the competitive film incentives), film and television production spending in the Province grew from \$1.3 billion in 2012 (\$CN) to \$2.6 billion in 2017.⁸

4 <https://esd.ny.gov/new-york-state-film-tax-credit-program-production>

5 <http://www.crainsnewyork.com/article/20161016/ENTERTAINMENT/161019904/soundstage-owners-like-steiner-studios-chairman-doug-steiner-are-building-facilities-to-keep-up-with-the-explosion-of-tv-shows-produced-in-new-york>

6 <https://www.bizjournals.com/atlanta/news/2016/10/14/pinewood-atlanta-studios-to-become-largest-studio.html>

7 CMPA 2016 Profile Report, pg. 26: <http://cmpa.ca/sites/default/files/documents/industry-information/profile/Profile%202016%20-%20EN.pdf>

8 CreativeBC, 2016/17 Tax Credit Certification Activity: https://www.creativebc.com/database/files/library/Tax_Credit_Certifications_2014_2017___Final.pdf

Much of the demand for space in the Vancouver metro area has been met with “conversion studio space.” According to a recent Colliers International report⁹, almost half of the studio space in metro Vancouver is converted industrial space, which typically lacks available amenities and services found on studio lots.

Faced with rising land values, new studio developments have moved outside the Vancouver hub. For example:

In 2017, Martini Film Studios opened in Langley, British Columbia, which is about an hour outside Vancouver. The studio houses eight stages with 150,000 square feet of production space.

In 2016, Skydance Studios opened in Surrey, which is 45 minutes south of Vancouver. The studio has five sound stages, with 75,000 square feet of space.

In 2018, Vancouver Island Film Studios is set to open the first film studio on Vancouver Island, with a 32,000 square foot facility.

ONTARIO:

Like its neighbor to the west, the Province of Ontario saw a production boom in recent years. In 2011, production spending in Ontario, which is largely clustered in Toronto, totaled \$1.13 billion (\$CN), according to the Toronto Film Office. Five years later, film and television production spending in the Province surpassed \$2 billion for the first time.¹⁰

Greater Toronto is home to Canada’s premiere studio facility in Pinewood Toronto Studios, which has 11 sound stages (250,000 square feet of production space) and is home to the 45,900 square foot mega stage, which is the largest purpose-built sound stage in North America. In June 2017, Pinewood broke ground on a 30,000 square foot expansion to the studio that will feature a “technologically advanced special effects stage.”¹¹

The other major studios in Ontario are Revival 629 studios and Cinespace Film Studios. Revival 629 studios has 13 sound stages, with a total of 121,000 square feet of production space. Cinespace Film Studios main studio lot houses 12 stage areas, with 320,000 square feet of production space. In September 2017, Cinespace broke ground on two new studios near Toronto, which will offer 50,000 square feet of total space when complete.

LOUISIANA:

As one of the first two states to enact a competitive film tax credit program modeled on Canada’s film incentives in 2003, Louisiana maintained a first-mover advantage in attracting film projects for almost a decade, and ranked by FilmL.A. Research as the third largest production center in the nation at its peak.

By 2009, Louisiana was home to four significant purpose-built studios: Second Line Stages, Celtic Media Center (formerly Raleigh Studios Baton Rouge), Millennium Studios and Nims Center.

Celtic Media Center in Baton Rouge opened its first large sound stage in 2008 and, by 2010, was the largest full-service studio lot in Louisiana with seven stages and 148,000 square feet of production space.

Second Line Stages in New Orleans opened in 2010 and operates three purpose-built sound stages with a total of 37,700 square feet.

Nims Center Studios, which is owned by the University of New Orleans Foundation, is located just outside New Orleans and is home to five stages with 48,200 square feet of space.

Finally, in 2014, just before the Louisiana legislature modified and capped the state’s film incentive, a new movie studio in New Orleans called Deep South Studios was announced. If completed, the \$64 million project would become the largest purpose-built independent studio facility in the Southeast. Plans for the studio include five sound stages with a total of 103,800 square feet of production space.

9 Colliers International, The B.C. Film Industry and Industrial Real Estate (2017): http://www.collierscanada.com/en/commercial-property-research/2017/spark-report-bc-film-industry-industrial#_Wlx3TVWnGUK

10 Toronto Film Office 2016 Year in Review: <http://www.toronto.ca/legdocs/mmis/2017/ed/bgrd/backgroundfile-101544.pdf>

11 <https://www.thestar.com/entertainment/television/2017/06/02/how-torontos-film-and-tv-production-has-surged-past-2-billion.html>

CONCLUSION

With the release of this initial report and FilmL.A.'s launch of an ongoing sound stage tracking effort, film industry and public-sector decision makers will enjoy fresh insight into L.A. based film production that has been unavailable since California's first motion picture studio opened in 1908.

The vast availability of sound stage infrastructure within Greater Los Angeles makes it necessary to know this information, not only to fully appreciate filming's ongoing importance to the state and regional economy, but also to assess California's place among its competitors and appreciate pro-business job creation efforts like the California Film & Television Tax Credit Program.

While the 12 studio partners featured in this study represent a majority of the largest sound stage operators in the region, they do not control the full inventory of certified sound stages. Many of the remaining stages are operated by small, independent companies, with different ways of doing business. As FilmL.A. expands its list of participating study partners, it will become clearer whether large and small studio operators differ in the genres of film productions they attract.

Further, as new studios are built and/or the composition of existing studios changes over time, so too might the productions using them. Ongoing sound stage tracking will allow FilmL.A. to stay abreast of these developments, while offering a more complete picture of local production.

What additional possibilities this information creates is a question for others to answer.



PHOTO: trekandshoot / Shutterstock.com

NEW PARTNER ENROLLMENT

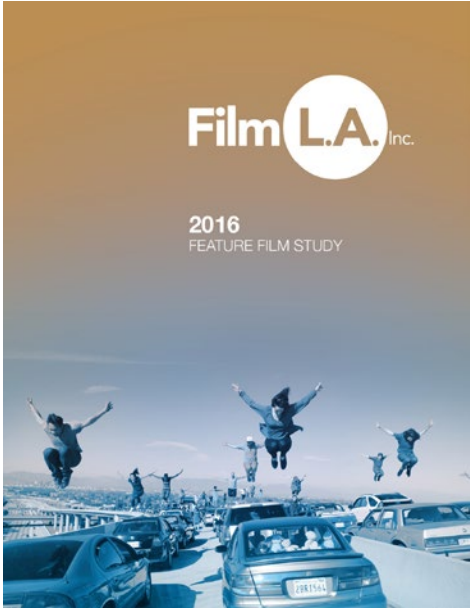
Are you the operator of a small, medium, or large certified film studio in Los Angeles? Would you like to see your facility represented in FilmL.A.'s next report? We'd love to include you in our efforts.

For an overview of the information FilmL.A. will require from you, as well as the confidentiality protections we offer you and your clients, please contact Adrian McDonald, FilmL.A.'s Supervising Research Analyst, at 213-977-8636.

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2016 FEATURE FILM STUDY



2017 PILOT PRODUCTION REPORT





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