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On-Location Filming in L.A. Sees Slow Start in 2019

Feature, Television and Commercial Production Levels Lag Last Year (For Now)

LOS ANGELES – April 17, 2019 – On-location filming in Greater Los Angeles declined 9.1 percent in the first quarter of 2019, due to a simultaneous slowdown in Feature, Television and Commercial production. In all, area filmmakers logged 8,843 Shoot Days (SD)* from January through the end of March. Despite the drop, FilmLA’s Research group expects local filming levels -- which last year attained near-record highs -- to ramp up as the year progresses.

“We’ve identified several factors contributing to the slowdown, and in our view, they are not a cause for alarm,” said Paul Audley. “Despite 2019’s slower start, we continue to expect that this will be among the most productive-ever years for on-location filming in Los Angeles.”

According to FilmLA data, Feature film production decreased 13.0 percent in the first quarter, to 708 SD. Timing appears to have played a role in the decline. In an unusual twist, only one project brought to Los Angeles by the California Film & Television Tax Credit Program has filmed on-location since January, after other incentivized projects wrapped by year’s end. According to the California Film Commission (CFC), there are many new feature films poised to begin production in the state, including 18 projects (10 studio projects and 8 independent projects) announced for the tax credit program in April. FilmLA predicts local Feature activity will increase once some of those films begin production.

Television production decreased 13.4 percent to 3,139 SD in the first quarter. Scripted series activity was brisk, bringing increases for TV Drama (up 4.6 percent to 1,197 SD) and TV Comedy production (up 36.8 percent to 544 SD). Losses stemmed from substantial drops in TV Pilot (down 60.3 percent to 108 SD), Web-Based TV (down 28.5

percent to 259 SD), and TV Reality production (down 25.2 percent to 690 SD).

On the positive side for TV, the California Film & Television Tax Credit continues to drive considerable activity in the region. According to FilmLA data, nearly one-third (31.6 percent, or 379 SD) of all production in the TV Drama category is incentive-driven. Some of the larger drama projects shooting in Los Angeles last quarter include *Animal Kingdom*, *Euphoria*, *Good Girls*, *Legion*, *Snowfall*, *Strange Angel*, *SWAT*, *The Affair*, *The Orville*, *The Rookie*, and *This is Us*.

Meanwhile, the once-reliable boost in production from the January-April pilot season continues to diminish. By FilmLA's count, 27 television pilots filmed on area streets last quarter, ten percent fewer projects than the previous year. Also, as FilmLA revealed in its 2018 Television Report – fewer new television projects are being made each year, industry-wide. Excluding straight-to-series orders, which do not involve producing pilots in the traditional sense, fewer TV pilots were made last year than at any time since 2008.

On-location Commercial production declined 15.1 percent in the first quarter, to 1,387 SD. Historically, Commercials has been a very strong category in Los Angeles, and the first quarter of 2018 was its most productive quarter on record. Contract talks between SAG-AFTRA and commercial producers may have played a role in the Q1 slowdown. Commercial producers are also vulnerable to economic pressures; higher-budget projects are often filmed where tax incentive support is available.

“As always, we caution against inferring too much from a single report,” observed Audley. “California and Los Angeles will continue to attract new film projects, because our creative workforce and support resources are unmatched in all the world.”

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.

* On-location production figures are based on days of permitted production within the jurisdictions served by FilmLA. One “Shoot Day” (or “SD”) is defined as one crew’s permission to film at one or more defined locations during all or part of any given 24-hour period. This measure determines how many days of work film crews perform during a given time period. FilmLA data does not include production that occurs on certified sound stages or on-location in jurisdictions not served by FilmLA.

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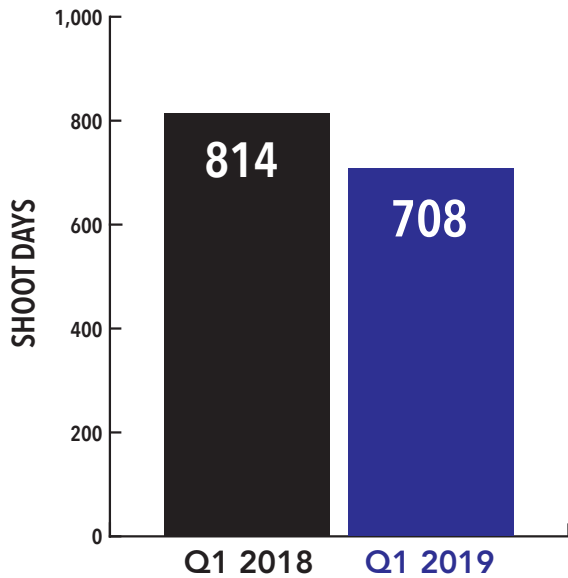
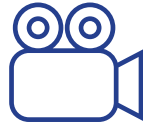


LOS ANGELES SHOOT DAYS*, BY CATEGORY

Calendar years 2018 – 2019, First Quarter

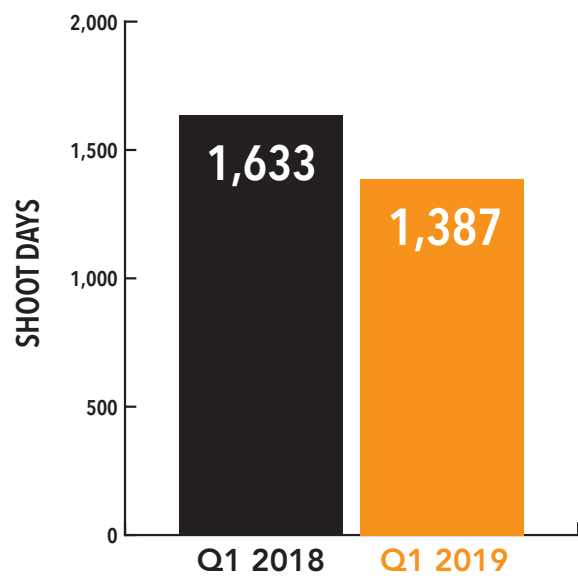
Feature Films

Versus Q1 2018: **-13.0%**
5 year average: **-18.0%**



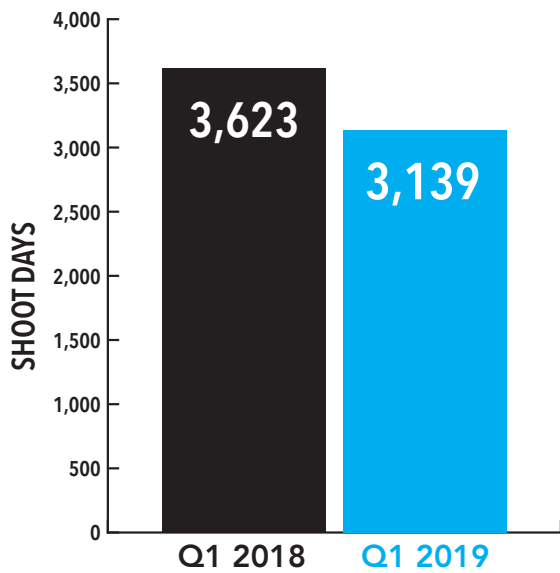
Commercials

Versus Q1 2018: **-15.1%**
5 year average: **-7.0%**



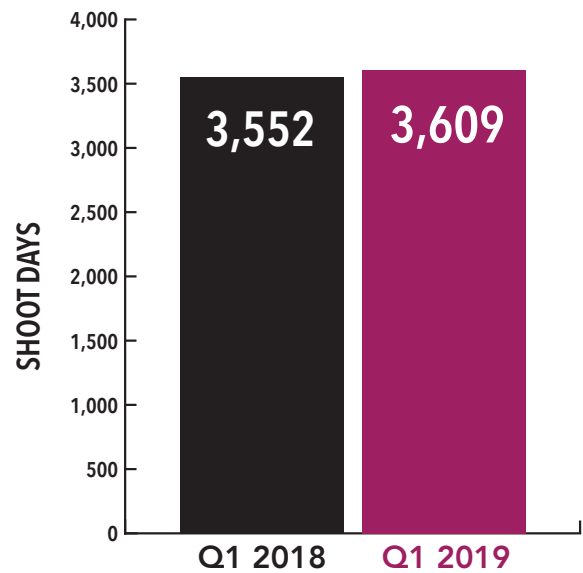
Television

Versus Q1 2018: **-13.4%**
5 year average: **-12.5%**



Other

Versus Q1 2018: **+1.6%**
5 year average: **+8.6%**



387 incentivized Q1 shoot days
12.0% of **Television** category

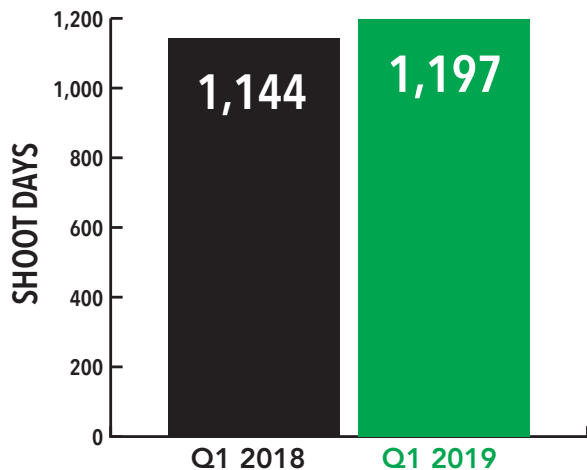
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LOS ANGELES SHOOT DAYS*, BY TELEVISION SUB-CATEGORY

Calendar years 2018 – 2019, First Quarter

TV Drama

Versus Q1 2018: +4.6%
5 year average: +9.0%

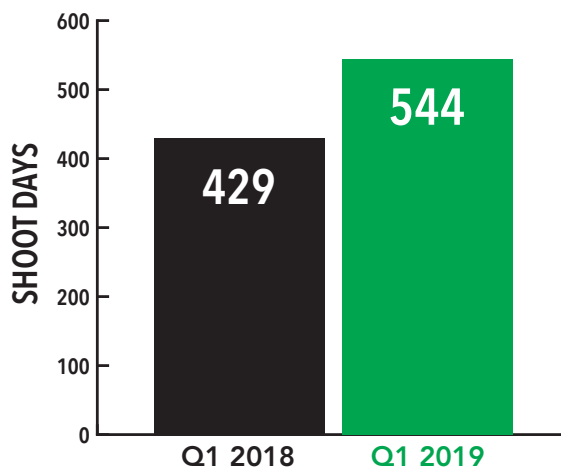


379 incentivized Q1 shoot days
31.6% of TV Drama category

Shows: *Animal Kingdom, Euphoria, Legion, Snowfall, Strange Angel, SWAT, The Affair, This Is Us*

TV Comedy

Versus Q1 2018: +26.8%
5 year average: +11.5%

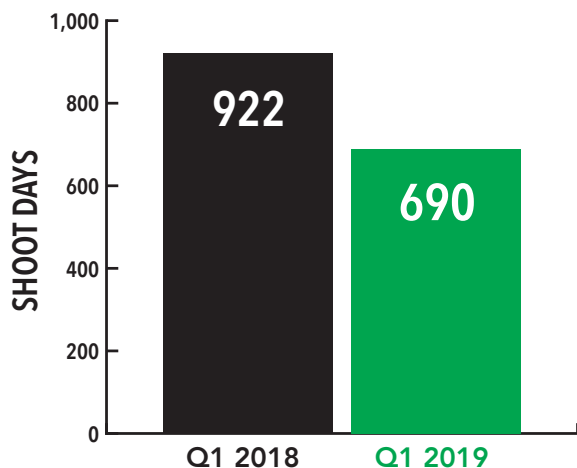


8 incentivized Q1 shoot days
1.4% of TV Comedy category

Shows: *Crazy Ex-Girlfriend, Veep*

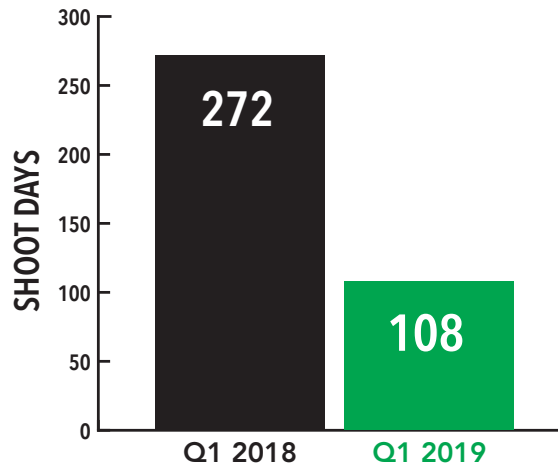
TV Reality

Versus Q1 2018: -25.2%
5 year average: -33.3%



TV Pilot

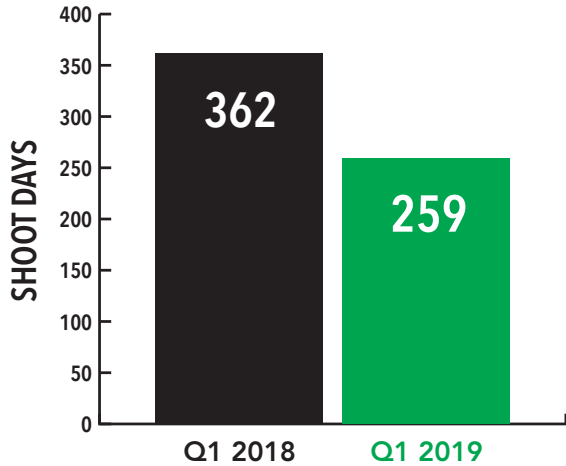
Versus Q1 2018: -60.3%
5 year average: -52.0%





Web-based TV

Versus Q1 2018: **-28.5%**
5 year average: **-24.3%**



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TOTAL

Versus Q1 2018: **-9.1%**
5 year average: **-4.8%**

