



Film **L.A.** Inc.

2014

FEATURE FILM STUDY



Last year, FilmL.A. Research released the 2013 Feature Film Production Report. In that first-of-its-kind study, FilmL.A. Research endeavored to track the movies released in 2013 to determine where they were filmed, why they filmed in the locations they did and how much was spent to produce them. Upon its release last March, the 2013 Feature Film Production Report made national news, much of which focused on one key finding: Louisiana hosted more of the major feature films released in 2013 than any other location on the planet.

The 2014 Feature Film Production Report follows the same methodology and tracks the feature films released theatrically within the United States during the 2014 calendar year. What a difference a year can make.

While total domestic box-office revenues in 2014 declined slightly from the record highs reached in 2013, global revenues still managed to reach a record high of \$36.4 billion. Despite over 700 movies released in 2014, a relative handful accounted for most of the global revenue. The top 50 films of 2014 pulled in almost \$20 billion worldwide; the top 25 films alone raked in roughly \$14.3 billion. In 2014, only five of the top 25 films at the worldwide box-office had budgets below \$70 million; none had budgets below \$30 million.

FilmL.A. Research focused on films that were produced by the six major studios in Southern California (“Majors”, including Disney, Warner Bros., NBCUniversal, Paramount, Sony and 20th Century Fox) and five of the best-known independent studios (“Mini Majors”, including Dreamworks, Lionsgate, Weinstein Co., Summit Entertainment and Relativity). This yielded a study sample of 106 feature films (7 animated and 99 live-action). Most of the films were produced in between 2012 and 2014, with just two wrapping production in 2011. From an economic perspective, the films produced by these studios cost the most money to make and employ the greatest number of people.

Of the 106 movies (see Appendix A for complete list) released by the Majors and Mini-Majors, reported production budgets ranged from \$2 million to \$250 million. The average production budget in the sample was \$62 million.

The 106 films in this year’s study represent over \$6.3 billion in direct production spending and tens of thousands of high-wage jobs in a wide array of professions. By comparison, the 108 movies included in the 2013 Feature Film Production Report had a combined production spend of \$7.6 billion.



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FILMING LOCATIONS

While Southern California and Hollywood are considered by many as the traditional home of moviemaking, the film industry is without a doubt a worldwide enterprise. Today, feature films produced by US companies are filmed throughout the globe. For many films, principal photography can--and often does--span more than one location. Accordingly, FilmL.A. worked to identify both *primary production locations* and *secondary production locations* for studied films.

In the end, our research determined that nearly 30 different US states and foreign countries were used as primary production locations among this study's 106 films.

From a national perspective, the US served as the primary production location for 64 percent (69 count) of the 106 films.

From a California perspective, the year saw a healthy reversal of the paltry 14 percent share from the prior, with 21 percent (22 count) of the films produced primarily within the state. In 2014, the home of Hollywood decisively dethroned Louisiana's "Hollywood South."

New York's rise to second place in the 2014 rankings is extremely impressive. The four films that primarily shot there among the 2013 releases didn't even rank the Empire State in the top five locations in last year's report, when the state tied with North Carolina for seventh place. Canada (as a whole) hosted three fewer films, tying it with the UK for third place with each location hosting 12 movies (within Canada, British Columbia hosted 8 films, Ontario 2, Quebec 1, Manitoba 1). Rounding out the top five locations was the State of Georgia, which hosted 10 films compared to 9 the year before.

Louisiana's plunge from number one in total project count (18 films in 2013, 5 films in 2014) to sixth place cedes ground to southern rival Georgia (9 films in 2013, 10 films in 2014). Louisiana state officials are contemplating capping their film incentive, but the \$200 million cap under consideration is unlikely to hamper the state's attraction of big-budget films.

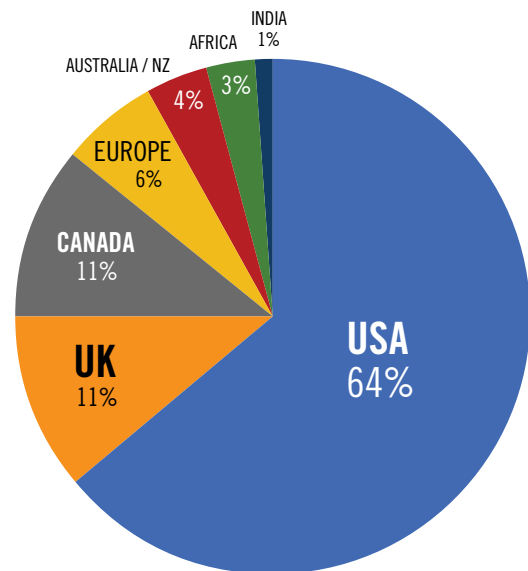
Many high-profile films of 2015 were filmed in Louisiana, including *Jurassic World*, *Fantastic Four* and *Terminator Genisys*. These will show up in future FilmL.A. feature studies.

What seems clear is that while the individual rank of the top five or six production centers may fluctuate, the list of those centers is unlikely to change from year to year.



Production Center	2014 Movies	2013 Movies
California	22	15
New York	13	4
UK	12	12
Canada	12	15
Georgia	10	9
Other US / Puerto Rico	9	9
Louisiana	5	18
Massachusetts	3	5
Australia	3	2
North Carolina	2	4
Michigan	2	1
New Mexico	2	3
Bulgaria	2	1
France	2	1
South Africa	2	0
Morocco	1	0
India	1	1
New Zealand	1	2
Romania	1	0
Germany	1	1

INTERNATIONAL SHARE OF 106 SURVEYED FILMS (2014)



MADE IN CALIFORNIA

Four of the 22 films produced in California were animated movies. Of the 18 live-action movies filmed primarily in the state, eight were among the fortunate productions to qualify for the California Film & Television Tax Credit Program (which was then operating under a \$100 million annual cap). There were four additional films released in 2014 (*Cake*, *Nightcrawler*, *Low Down*, *Walk of Shame*) that received the California film incentive; these projects were not included in this report, as they were not produced by the surveyed studios.

Three live-action films with budgets of \$7 million or less also filmed in California, as incentives in other locations are often not lucrative enough for smaller projects that would have to incur additional travel, lodging and shipping costs if they left the state.

The Kevin Hart film, *About Last Night*, was set in Los Angeles, and the creative desire to shoot the film where it's set (a novelty for most films) was aided by careful production planning that had all of the filming sites located within a tight 10-block radius to lower transportation costs.

The location manager on *About Last Night* helped reduce production costs by negotiating with merchants to reduce filming location fees in exchange for using their real business names in the film, which offered a marketing benefit from audience exposure to the movie.

California also got lucky with several films shot in the state that were helmed by some of the very few prominent directors able to dictate where films will be made.

The \$20 million film, *Inherent Vice*, which is set in L.A., was directed by Paul Thomas Anderson who insisted the film be shot in his home state of California.

Director David Fincher kept most of the \$50 million budget for *Gone Girl* in California by shooting most of the film in Los Angeles. Fincher did take *Gone Girl* to Missouri (the primary setting) for five weeks, where it spent \$7.8 million of its budget and received an incentive from the state.

Finally, Christopher Nolan, who has made many of his films entirely or substantially in California, was able to steer much of the massive \$165 million budget for *Interstellar* into the state's economy. More than half the film was shot at various locations around Los Angeles, including stage work done at Sony Pictures Studios in Culver City. Much of the visual effects work, which won the Academy Award® for the category, was done by California-based New Deal Studios (which was mentioned in the acceptance speech during the Oscars®).

CA Tax Credit Project	CA Spend (million)	Extras	Cast	Crew
<i>The Gambler</i>	\$31	2,704	42	185
<i>Ouija</i>	\$7.9	113	6	75
<i>Horrible Bosses 2</i>	\$57.3	1,650	40	125
<i>The Purge: Anarchy</i>	\$10.6	567	20	160
<i>Earth to Echo</i>	\$12.3	666	52	160
<i>American Sniper</i>	\$54	3,725	73	327
<i>Paranormal Activity: The Marked Ones</i>	\$9	560	76	81
<i>Jersey Boys</i>	\$58.6	4,878	101	200
TOTAL	\$241	14,863	410	1,313



PRODUCTION SPENDING

From an economic stand-point, a much more important number than project count is total production spending. For a given location, hosting just one movie that spends \$100 million has a bigger economic impact in direct spending than hosting 10 films with \$5 million budgets.







In addition to film crew wages, expenditures offer insight into how local production vendors and suppliers benefit from a production's presence. Money spent on film production circulates within a local economy, eventually providing benefits to individuals and businesses that are unaffiliated with the film production directly.

Of course, serving as a primary shooting location for a \$100 million film project does not mean a given jurisdiction will see the film's entire budget spent within their borders. Even for California-based films, this would today be a rare occurrence.

Determining where filmmakers spend their budgets is very difficult, given that full production budgets are rarely disclosed, except to hired auditors. Complicating matters further, most feature films produced today use multiple jurisdictions throughout every stage of development.

The proliferation of government programs designed to attract film production has led to one very useful development for film industry researchers. Today, it is possible--although still rather difficult--to compare production spending across different jurisdictions.¹

In Canada and the UK, the respective government agencies and film commissions that report on production activity and/or administer incentive programs, do not disclose spending information for individual projects. However, aggregate spending totals for different production categories and country of origin are disclosed, and jurisdiction spend percentages versus total budget are reported.

Production Center		Movies	Budget Value (millions)	Amount Spent in Location
California		22	\$1,321	\$1,116 (84%)
UK		12	\$1,154	\$762 (66%)
New York		13	\$743	\$520 (70%)
Canada		12	\$679	\$475 (70%)
Georgia		10	\$366	\$216.5 (60%)
Louisiana		5	\$302	\$192 (63%)

Precise in-state spend amounts for the eight films that received the California Film & Television Tax Credit were provided by the California Film Commission. In some instances, FilmL.A. was able to obtain the exact California spend for specific films from filmmakers and/or respective studios (these amounts are aggregated for confidentiality reasons). For the remaining live-action films, a different approach was required.

Because of the state's massive infrastructure and deep vendor supply base, very few goods or people need to be imported into California to sustain local feature film production. According to the Los Angeles Economic Development Corporation (LAEDC), 92 percent of all production spending on live-action production in California is wholly sourced from within the state. For the live-action California films that did not receive the state's film incentive, we applied the LAEDC's approach and assumed 92 percent of their budget was spent in the state.



¹ Percentage sources: 2012 British Columbia Film Commission Production Statistics; CMPA Profile 2014 Report; 2014 British Film Institute Statistical Yearbook. Georgia's spending estimate stems from a 2010 economic impact report commissioned by the MPAA and prepared by Meyer's Norris Penny (MNP), MPAA spend information for *Million Dollar Arm*; Georgia spending estimates were lowered to a 50% share of total budget on two films (*Need for Speed* and *Hunger Games: Mockingjay Part 1*) as both projects spent substantial time shooting in other locations and had substantial spending on VFX at companies wholly outside the state.

PRODUCTION SPENDING (CONT.)

For bigger-budget animated movies, production occurs mostly in California. Since three of the four animated films produced in California for 2014 were produced exclusively in the state and an estimated half of the fourth split between California and India, an estimated 88% (\$522.5 million) of their combined budgets remained in the state.

In terms of total production value and the respective share of production spending, California outperformed its top competitors last year, ranking first on both. By comparison, in 2013 California ranked third in budget value, but first in total amount spent in the state. California's strong showing in 2014 was made possible by two factors.

First, the state was fortunate to host the production of four major animated films released in 2014 (*Big Hero Six*, *How to Train Your Dragon 2*, *Penguins of Madagascar*, *Mr. Peabody & Sherman*). The combined budget value of the four animated films was \$590 million, which is almost half (46 percent) of total budget value. As FilmL.A. reported in last year's study, most competing locations enacted film incentives to lure live-action film production. Incentives targeted specifically at animated production are a more recent development and offered by relatively few competing locations. Two of the top animated films of 2014 produced outside California (*The Lego Movie* and *Rio 2*) were made in Australia and Connecticut respectively; both offer incentives specifically for digital and animated production.

Second, California also benefitted from hosting two big-budget live-action movies released in 2014: *Captain America: The Winter Soldier* (\$177 million) and *Interstellar* (\$165 million). Unlike the two big-budget live-action movies from 2013 (*Star Trek: Into Darkness* and *The Hangover Part III*), which shot almost exclusively in California, both of the 2014 movies spent large amounts of time (and money) in other locations which offer generous financial incentives.

For example, *Interstellar* spent just over a month filming sequences in Alberta, Canada and 10 days of shooting in Iceland. For *Captain America: The Winter Soldier*, substantial location shooting (including one of the film's major action sequences) occurred in Cleveland, Ohio for roughly six weeks. While filming in Ohio, the film spent over \$31 million, including wages for an estimated 900 locals and goods and services from roughly 750 vendors.

In sum, the six movies discussed above (4 animated and 2 live-action) represent 71 percent of the budget value for all 22 California movies in 2014. If the budget value for animated films produced in California is excluded, California would be knocked from first to third place in live-action budget ranking behind the UK and New York, respectively.



VFX AND MUSIC SCORING







FilmL.A. is aware of a widely held belief that while California may lose out on principal photography due to runaway production, the state is still the beneficiary of the bulk of post-production and visual effects work. Mounting evidence demonstrates that this is not true. The UK and Canada have both usurped California (and the US) as global centers for VFX work. This is a concern for California because the biggest-budget features spend much of their production budgets on post and VFX. An analysis of the 24 live-action movies with budgets of \$75 million or more reveals that almost half of the total jobs on many films go to VFX.



Movie	Budget (millions)	Primary VFX Location
<i>The Hobbit: The Battle of the Five Armies</i>	\$250	New Zealand
<i>Transformers: Age of Extinction</i>	\$210	Industrial Light & Magic California
<i>X-Men: Days of Future Past</i>	\$205	Canada
<i>Exodus: Gods And Kings</i>	\$200	London/Singapore
<i>The Amazing Spider-Man 2</i>	\$200	Canada
<i>Maleficent</i>	\$180	UK; Canada
<i>Edge of Tomorrow</i>	\$178	Canada
<i>Captain America: The Winter Soldier</i>	\$177	ILM - Canada/US
<i>Dawn of the Planet of the Apes</i>	\$170	New Zealand
<i>Guardians of the Galaxy</i>	\$170	London, UK
<i>Interstellar</i>	\$165	London; Los Angeles
<i>Godzilla</i>	\$160	Vancouver
<i>The Hunger Games: Mockingjay, Part 1</i>	\$140	London
<i>Night at the Museum: Secret of the Tomb</i>	\$127	UK; Canada
<i>Noah</i>	\$125	ILM California
<i>Teenage Mutant Ninja Turtles</i>	\$125	ILM San Francisco; Canada
<i>300: Rise of an Empire</i>	\$110	Canada
<i>Dracula Untold</i>	\$100	UK
<i>Hercules</i>	\$100	London
<i>RoboCop</i>	\$100	London; Los Angeles
<i>Transcendence</i>	\$100	London
<i>Divergent</i>	\$85	Canada
<i>The Monuments Men</i>	\$75	London
<i>Winter's Tale</i>	\$75	Los Angeles

Based on a review of the top 25 live-action movies released in 2013 (which had budgets of \$100 million or more) and the 24 films surveyed in this report, the situation for the California VFX industry is even worse than it was just one year ago.



Production Center	Primary VFX Locations 2013 Movies	Primary VFX Locations 2014 Movies
California 	10	7
Canada 	7	10
UK 	7	11
New Zealand 	5	2

As for music scoring, Los Angeles "scored" musical work for roughly 43 of the 106 films in this year's study.

FILM PRODUCTION JOBS

In the US, most jurisdictions seeking to attract film projects make some kind of effort to track the jobs they create in the process. Unfortunately, the number of different counting methods in use makes comparing job growth across jurisdictions near impossible.

While various jurisdictions report employment counts for specific projects (or report total job counts in the aggregate), they differ in their job count methodologies.

For example, North Carolina officials report the total number of people who work on film projects in their state, regardless of how long those jobs last. A background actor who worked a single day on a film like *Iron Man 3* would be counted as holding one job, the same as the director, who worked on the film every day and was paid substantially more. Nevertheless, from a total job count perspective, many would count this as two jobs.

Officials in some states, like Pennsylvania, attempt to do one better by calculating the number of Full Time Equivalent (FTE) jobs created by local filming. Using this method, although a total of 4,057 people worked on 2009's *Law Abiding Citizen* in Pennsylvania, the number of FTE jobs created was 544.

New Mexico uses a different approach altogether and reports the number of film “worker days.” While this is similar to the FTE approach in terms of obtaining a more accurate employment picture, the state only reports the number in the aggregate, making it impossible to know how many worker days a movie like *Transcendence* racked up while shooting in the state.

Given the varying methodologies to track film production employment across the globe, FilmL.A. elected to use credited job count estimates to calculate the number of jobs California likely lost to other jurisdictions that hosted primary production for one or more of the 2014 releases in this report. While not a perfect methodology, the estimated job counts based on credited positions tends to be more conservative than many headcount estimates employed in different states. That said, for the films in this study, California lost out on approximately 57,000 credited jobs for the movies that filmed primarily outside the state.

THE LURE OF INCENTIVES

With the exception of New York, all of California's top five competitors offer substantial uncapped film incentive programs:

Location	Film Incentive
New York	30% on qualifying local spend for Below-the-Line (BTL) costs. Above-the-Line costs are excluded from the incentive. Annual cap of \$420 million.
Louisiana	30% of qualifying local spend including the payroll for residents and nonresidents, and 5% additional for resident payroll
Georgia	20% of the base investment in the state, plus 10% if the qualified production activities include a Georgia promotional logo in credits.
UK	20-25% of all qualifying local UK spend
British Columbia (Canada)	33% of qualifying British Columbia (BC) labor expenditures; Digital Animation or Visual Effects (DAVE) Credit bonus: 17.5% additional credit on qualifying DAVE labor
Ontario (Canada)	25% of qualifying Ontario expenditures (not limited to ON labor); Bonuses: Computer Animation and Special Effects- 20% of qualifying labor related to digital animation and special effects work
Quebec (Canada)	25% of qualifying Quebec (QC) expenditures (not limited to QC labor); Bonuses: QC Computer Animation and Special Effects Tax Credit = 20% additional credit on qualifying animation and special effects QC labor
California	20% of qualifying local spend for Below-the-Line costs for non-independent projects, 25% for independents and relocating television series. Annual cap of \$100 million under original program (2009-2014), \$330 million annual cap under new program (2015-2020)

The top filming locations outside California are recognized production centers with modest to robust film industry infrastructure and talent. That said, the concentration of industry infrastructure and industry talent still places California far ahead of its rivals. This world-class infrastructure and home-field advantage is one of the reasons California was the only location in this study to attract non-incentivized projects. Indeed, while California hosted 15 such productions (4 animated & 11 live-action), none of the top five competing locations outside the state hosted even a single surveyed film without offering a generous subsidy.

THE LURE OF INCENTIVES (CONT.)

California has its own Film & Television Tax Credit Program, enacted in 2009. Before changes that were enacted last year that will begin to take effect in 2015, the California Film & Television Tax Credit Program was subject to several significant limitations that hampered the state's ability to attract large-budget films.

California's program had an annual cap of \$100 million in available tax credits, a relatively modest amount compared to other locations, especially those with uncapped programs.

The \$100 million in tax credits California offered each year were also largely consumed by returning television series, which were guaranteed credits every year after qualifying for the program. By 2014, over 75 percent of credits were reserved for returning TV series, which left only a small fraction available for new projects like feature films.

Finally, feature film projects with budgets in excess of \$75 million were completely ineligible under the older program.

Excluding animated movies, 25 of the 106 films had budgets over \$75 million. Just two of these filmed primarily in California: *Captain America: The Winter Soldier* (\$177 million) and *Interstellar* (\$165 million). Both of these filmed large portions outside of the state, where they did receive incentives from other locations.

Looking ahead to 2015 releases, there isn't a single live-action movie with a budget estimate over \$100 million that shot primarily in California.

California's Film & Television Tax Credit was significantly enhanced towards the end of 2014. Beginning in July 2015, the annual cap for all tax credits will be increased to \$330 million, with 35 percent dedicated solely for feature films. More importantly, features with budgets over \$75 million will be eligible to apply for the new incentive.



THE LURE OF LOCATIONS & FILM TOURISM

Are exotic locations still a lure for filmmakers? It seems unlikely. In today's feature film business, creative concerns and realism in film setting are trumped by economic realities. Films that are set in California (or any other location) can often be filmed in alternate locations worldwide.







Projects Set in California	Budget (millions)	Primary Filming Location	Incentive (millions)
<i>Dawn of the Planet of the Apes</i>	\$170 (\$85 spent in La.)	Louisiana	\$26.4
<i>Godzilla</i>	\$160	Vancouver, Canada	N/A
<i>Let's Be Cops</i>	\$17	Georgia	\$5.1 (est.)
<i>Sex Tape</i>	\$40	Massachusetts	\$10 (est.)
<i>Big Eyes</i>	\$10	Vancouver, Canada	N/A
<i>Million Dollar Arm</i>	\$25 (\$13 spent in GA)	Georgia	\$3.9 (est.)
<i>Transcendence</i>	\$100	New Mexico	N/A
TOTAL	\$522 million		

While competing jurisdictions have been successful at luring big-budget projects away from California, it does beg the question of whether projects set in California deliver one of the key promised benefits from generous incentive programs. Proponents in other states and nations frequently tout the benefit of Film Induced Tourism (FIT) to lawmakers, an argument that is increasingly relied upon to persuade policymakers to justify costly film incentive programs.

In order for a film to have a chance at creating FIT for a location, several key factors are necessary². First, most examples of film tourism are for films that enjoyed critical and/or commercial success. Second, to generate FIT for a specific place, the film must be set—though not necessarily filmed—in that location. Third, most of the notable examples of FIT feature “iconic” locations like the baseball field from *Field of Dreams* or the park bench in Savannah, Georgia from *Forrest Gump*. Fourth, filming the project wholly or partially where the story is set will increase the odds of generating FIT.

Continuing an analysis FilmL.A. began in last year's report, we examined the validity of making the FIT argument for the top filming locations.

Made Here... But Set Elsewhere

Location	Movies	Primarily Set	Partially Set	Set Elsewhere
California 	22	12	1	9
New York 	13	11	1	1
Canada 	12	0	0	12
U.K. 	12	3	2	7
Georgia 	10	4	0	5
Louisiana 	5	1	1	3



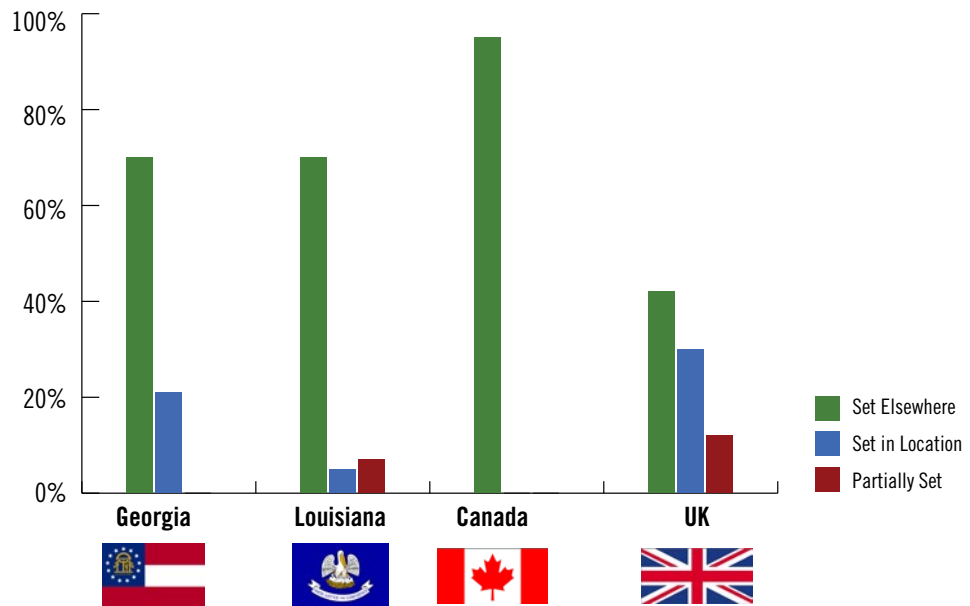
² Roger Riley, Dwayne Baker, and Carlton S. Van Doren, “Movie Induced Tourism”, *Annals of Tourism Research*, Vol. 25, No.4, pp. 919-935, 1998

THE LURE OF LOCATIONS (CONT.)

For movies released in 2014, New York is the most likely to benefit from FIT. Just one New York project (the biblical epic, *Noah*) was set completely in another place. By comparison, all four 2013 movies shot in New York were set primarily in the state. Only California, long known for its ability to mimic other locations, comes close to New York for films produced here that are also set in the Golden State.

The case for FIT is extremely weak in the other locations: Canada, UK, Georgia, and Louisiana. Looking at all theatrical releases we studied in 2013 and 2014, the UK has the highest chance to generate FIT, with 50 percent of films produced set or partially set there. The case for FIT is weakest in Canada, where none of the 27 films produced there are even partially set in the Provinces.

**Setting of Movies in Top Filming Locations:
The Case for Film Tourism**



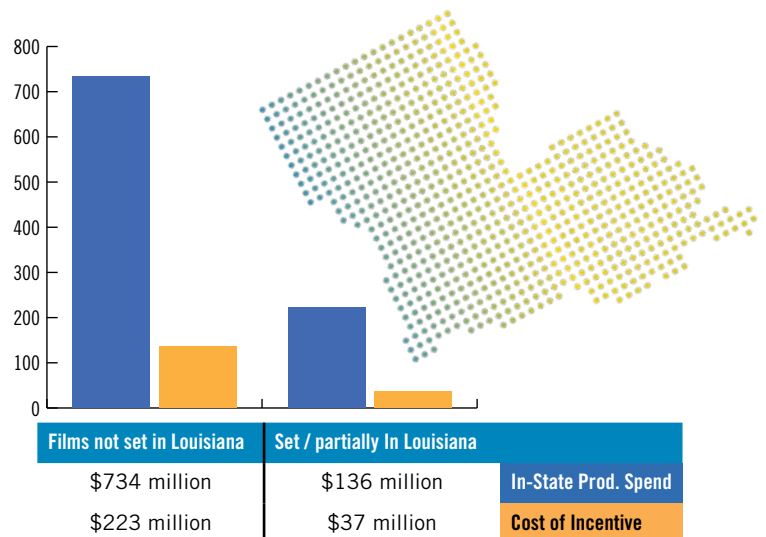
Proponents of Louisiana’s film incentive place heavy emphasis on FIT and its claimed impact on the program’s return on investment. Films and television shows shot in Louisiana are believed to induce visits to the Pelican State.

With regard to the films studied by FilmL.A. over the last two years, however, the case for Louisiana FIT seems weak. The vast majority of Louisiana-made projects from 2013 and 2014 do not meet established FIT requirements. Indeed, 86 percent of the incentive money Louisiana spent on these movies went to projects set wholly outside the state.

In fact, over the last two years the state spent nearly twice as much (\$67 million) on films set in California than it did on films set within the Pelican State.

Movie	Setting	Louisiana Incentive Cost
<i>Terminator Genysis</i>	Los Angeles, San Francisco	\$31.2 million (est.)
<i>Dawn of the Planet of the Apes</i>	San Francisco Bay Area	\$26.4 million
<i>This Is the End</i>	Los Angeles	\$9.5 million

**Louisiana Spending and Incentive Cost for Movies
Set In State vs. Set Outside State in 2013 & 2014**



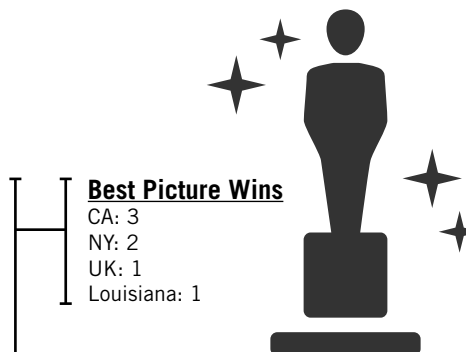
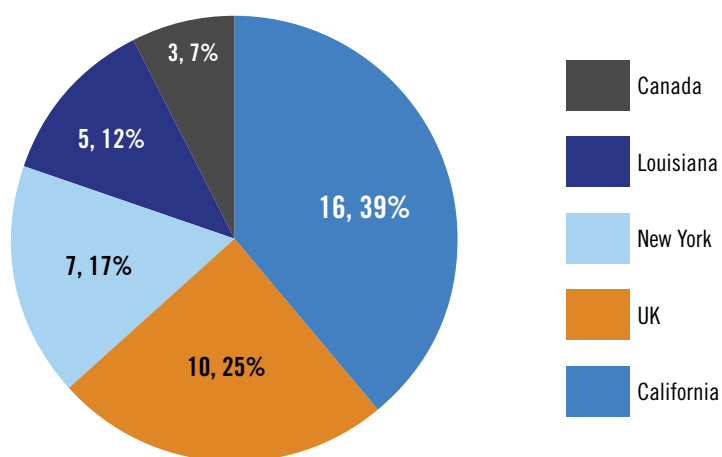
TOP LOCATIONS AT THE ACADEMY AWARDS®

Over the last ten years, just five of the top filming locations (California, New York, Louisiana, Canada and the UK) have been home to 41 movies nominated for Best Picture, including seven total wins in the category. California was home to the most, with almost 40 percent of the nominated films; the state also had the most Best Picture wins with three victories (*Argo* 2012, *The Artist* 2011, *Crash* 2005). New York ranked second with 10 nominated films and two Best Picture wins, followed by the UK and Louisiana. Canada was the only location without a win for Best Picture and ranked last with just three nominations.



Top Filming Locations: Academy Award® for Best Picture

Nominations / Wins 2005 - 2014




For a location like Louisiana, it's also worth noting that three of the four films (*Curious Case of Benjamin Button*, *Django Unchained*, *Beasts of the Southern Wild*) nominated for Best Picture that filmed in the state were wholly or partially set there as well.

Conversely, for a location like Canada, none of the three nominated films were wholly or partially set in the Provinces they filmed in (*Brokeback Mountain*, Alberta; *Juno*, British Columbia; *Life of Pi*, Quebec).

In all but one year, the winner for Best Picture were for movies that filmed in the locations where they were wholly or partially set. The sole exception was *The Departed* (2006), which was set in Boston but filmed over 90 percent its shoot in New York, which doubled for the Massachusetts city.

Year	Best Picture Winner	Filming Location
2014	<i>Birdman</i>	New York
2013	<i>12 Years a Slave</i>	Louisiana
2012	<i>Argo</i>	California
2011	<i>The Artist</i>	California
2010	<i>The King's Speech</i>	UK
2009	<i>The Hurt Locker</i>	Middle East
2008	<i>Slumdog Millionaire</i>	India
2007	<i>No Country for Old Men</i>	New Mexico / Texas
2006	<i>The Departed</i>	New York
2005	<i>Crash</i>	California

Year	CA Best Picture Nominee / Winner
2014	<i>American Sniper</i>
2013	<i>Her</i>
2012	<i>Argo</i> (winner)
2011	<i>Moneyball</i>
2010	<i>The Social Network</i>
2010	<i>The Kids Are All Right</i>



Finally, when it comes to the California Film & Television Tax Credit, incentivized projects have had remarkable success at the Academy Awards®, fielding a nominee and/or win for Best Picture every year since the program took effect in 2009/10.

California's success at the 2014 Academy Awards® for all films, including those that did not receive the state's incentive, is further evidence of the state's home field advantage when it comes to the best crews and best infrastructure. Last year the state was home to more Academy Award® nominations and more Academy Award® wins than any other location on the planet.

TOP FILMING LOCATIONS AT THE BOX OFFICE

In 2014, 21 of the top 25 movies at the worldwide box office had budgets over \$100 million – the same as in 2013.

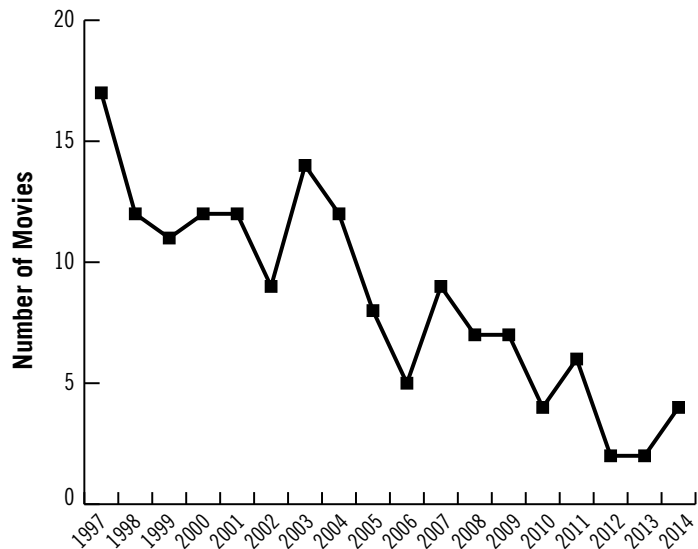
For competing filming centers across the world, hosting a share of principal production of these top 25 movies promises massive economic benefits. The combined budgets of the top 25 movies totaled more than \$3.5 billion in 2014 (almost identical to 2013).

Eighteen years ago, California's share of the top 25 movies (including both animated and live-action) at the worldwide box office was a commanding 68%; for live-action only, California's share was 64%. After bottoming out in 2013, California's market share of the top 25 animated and live-action movies improved slightly to 28 percent in 2014. Excluding animated films, California's share of the top 25 movies in 2014 was 16 percent compared to just 8 percent the prior year.

For the last eighteen years, just a handful of filming locations have dominated the top 25 films at the worldwide box office: California, Canada, New York, UK and Louisiana.³

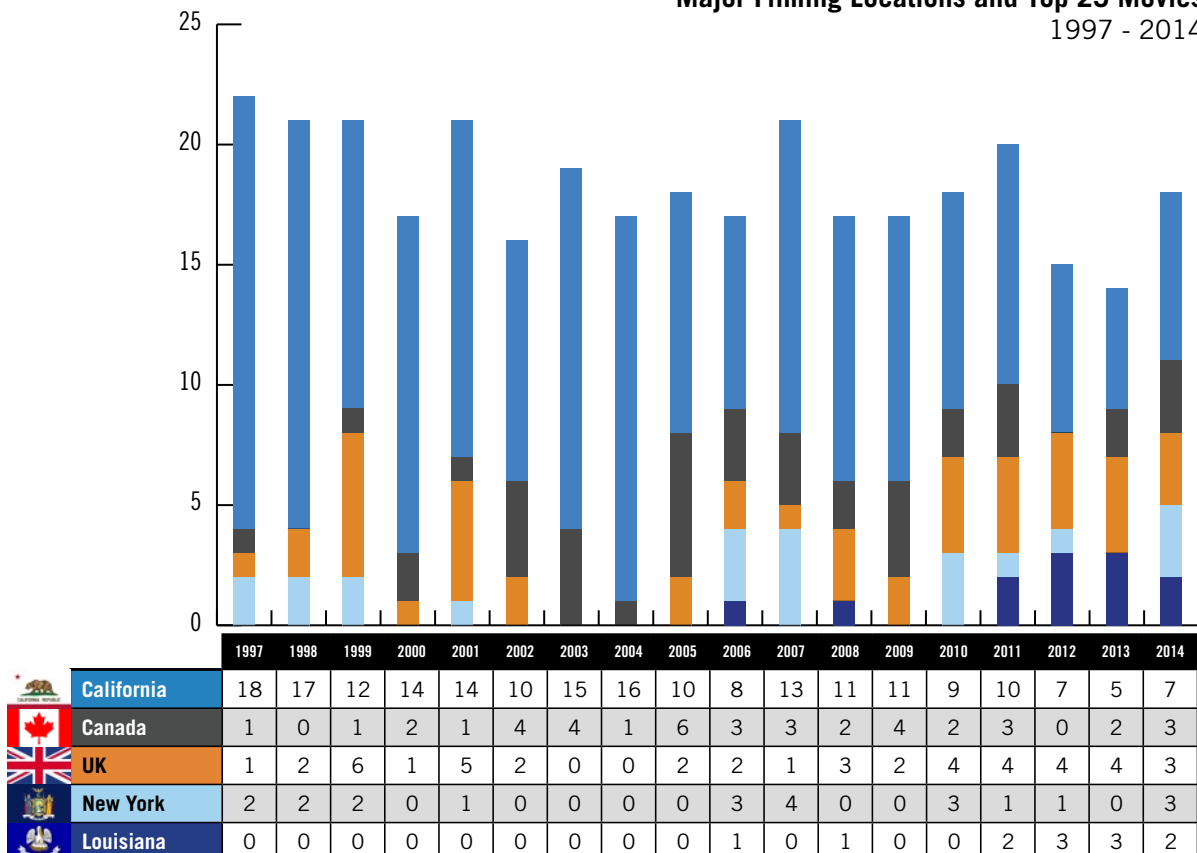
These five locations combined have contributed 15 or more movies in the top 25 made primarily in their respective jurisdictions every year from 1997-2014 with the exception of 2013, when their combined total was 14.

Number of Top 25 Live-Action Movies Filmed in California 1997 - 2014



³ Louisiana began contributing to the top 25 list in 2006 and 2008, with one film in each. For the last four years (2011-2014) the state has been more consistent with 2-3 films on an annual basis.

Major Filming Locations and Top 25 Movies 1997 - 2014



INDEPENDENT FILMS

In the Los Angeles region, one of the main measures of film production activity is FilmL.A. Research's Quarterly On-Location Production Report. The reports detail the number of Shooting Days (SDs) for on-location filming in areas served by FilmL.A. In 2014, the number of feature SDs decreased 3.2 percent compared to the previous year (4,535 vs. 4,687). The level of feature activity had been undergoing a very mild recovery from 2009 to 2013, but feature activity in L.A. remained well below the peak seen in 1996, the year before the first significant Canadian film tax credits took effect.

A closer look at the permit data reveals a decline in the economic value of the average L.A. based feature. In 2014, roughly 570 feature films shot in a FilmL.A. jurisdiction, down slightly from roughly 580 features the year before. The vast majority of these projects are low-budget independent films.

According to the Independent Film & Television Alliance (IFTA), roughly 400 independent films are produced each year with budgets of \$50 million or less, and for these projects the average crew size is 30 people. Although this may not look like much on a per-project basis compared with a large-budget feature, the cumulative job and spending impact of independent film production is significant, particularly for the Los Angeles economy.

Notable independent films that shot primarily in California in 2014 (and were not tracked in this study) include: *Cake*, *Chef*, *Nightcrawler* and *Whiplash*.

CONCLUSION

With the arrival of the new and improved California Film & Television Tax Credit, California will see an increase in the number of big-budget feature projects made in the state, but it will take at least two years before such films are released theatrically and begin to register in future FilmL.A. Feature Film Production Reports. In the meantime, most California-made feature films with budgets over \$100 million are likely to be animated projects.

As for California's competition, the strongest players are well known. Canada, New York, Georgia, Louisiana, and the UK are California's primary competitors for the foreseeable future. While these jurisdictions may trade yearly rank positions for total project count, budget value and production spending, there are no jurisdictions immediately poised to dethrone them.



STUDY METHODOLOGY:

The goal of this study was to determine where each of our 106 tracked films was produced, why they filmed in a particular location, how much they spent, where they spent it and the local economic impact they created, when known. That proved to be no easy task.

Tracking Overseas Feature Production

Given the tremendous economic importance of the 100+ big budget movies released by the Majors and Mini-Majors each year, there is little publicly-available information about where and how the billions of dollars it takes to produce these projects are spent. In places like Canada, the UK and others, regular reporting and tracking of film & television production (much of it from the US) is a government concern at the national level.

Project level data for the 106 movies included in this study was not readily disclosed to FilmL.A. by the relevant government agencies in the various foreign nations that hosted them, specifically the UK and Canada. In the United Kingdom, the limited liability companies established by studios to manage the production of specific films are required to file tax reports under the UK film tax credit program. Where the names of these production companies was known, individual filings were obtained.

The sheer volume of spending data and detailed aggregate breakouts for different types of activity reported by Canada, the UK, Australia and New Zealand provided a wealth of information that was useful for this study.

Tracking Domestic Feature Production

The quality and transparency of film industry data varies from state to state. Fortunately, detailed information from key states (including California, Louisiana, Massachusetts, Pennsylvania, North Carolina, Connecticut and Michigan) that hosted many of the 106 movies in the study was available. Without this core information, it might have been impossible to produce this report.

Some states (Louisiana, North Carolina or Michigan are examples) require rigorous audits and openly report specifics including how much a film spent in the state, reliable budget numbers, how many resident or non-resident workers and/or businesses productions hired or paid, and even how much state money was paid under the incentive program to specific productions by name.

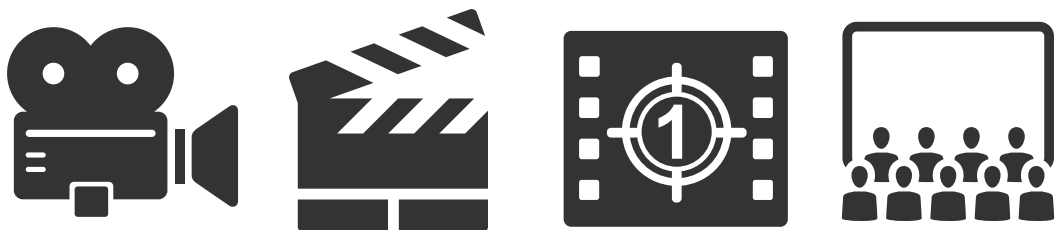
Louisiana's Department of Economic Development (DED) was extremely helpful in responding to multiple data requests. While the information obtained from Louisiana is not readily available online, it is provided to anyone who contacts DED directly.

At the other end of the spectrum are states like New Mexico, which unhelpfully only report on film production spending and employment in the aggregate. The State of Georgia, which recently surpassed Louisiana in annual production spending, has one of the least transparent film incentive programs. The only information Georgia releases are the titles of select projects that filmed in the state and the aggregate amount of all production spending from major movies down to TV commercials. Until recently, New York did not reveal the names of projects receiving the state's film incentive or the amounts awarded. As of late 2014, all projects certified for New York tax credits are required to be disclosed publicly.

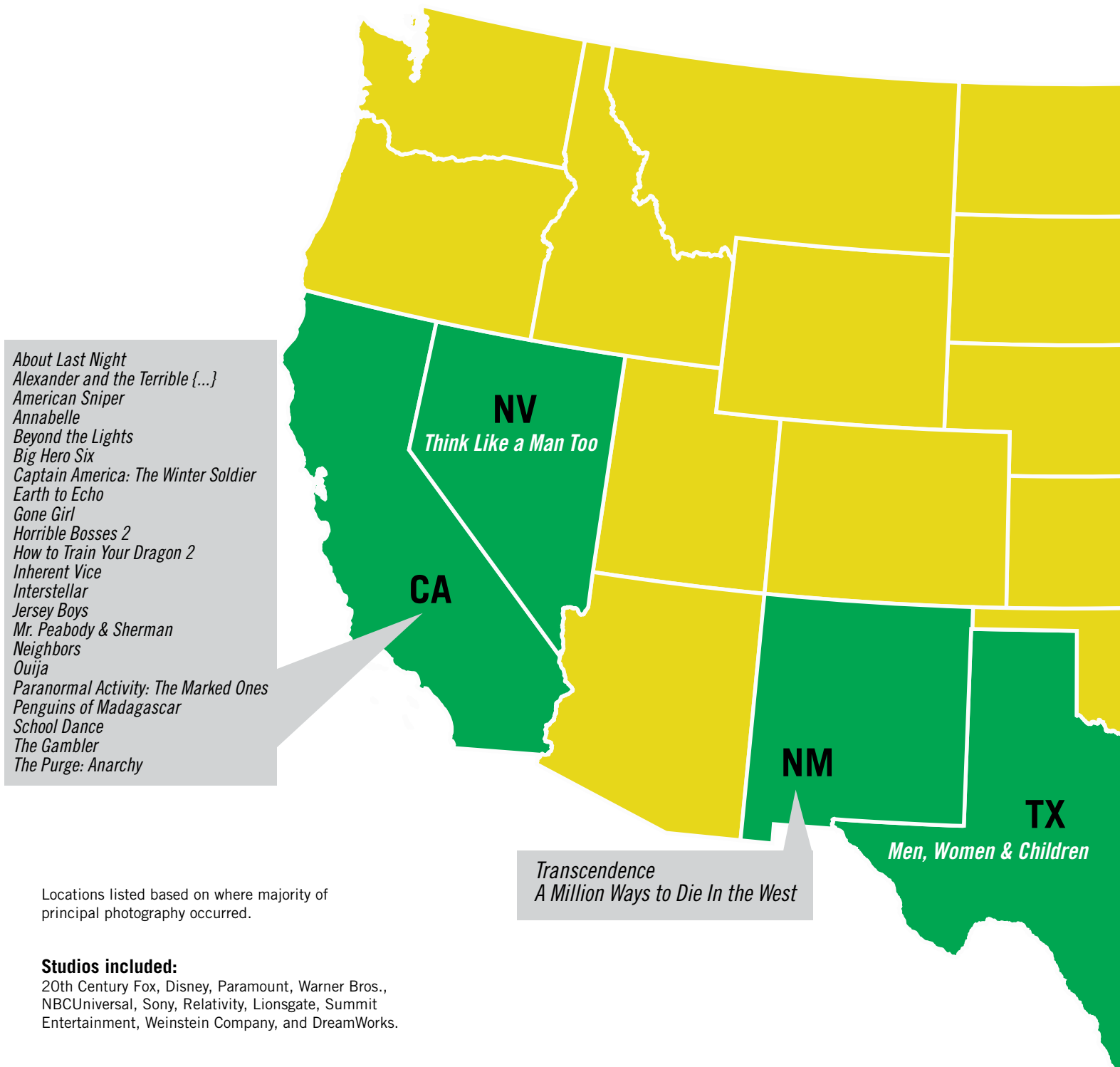
Tracking Using Online Databases & Media Outlets

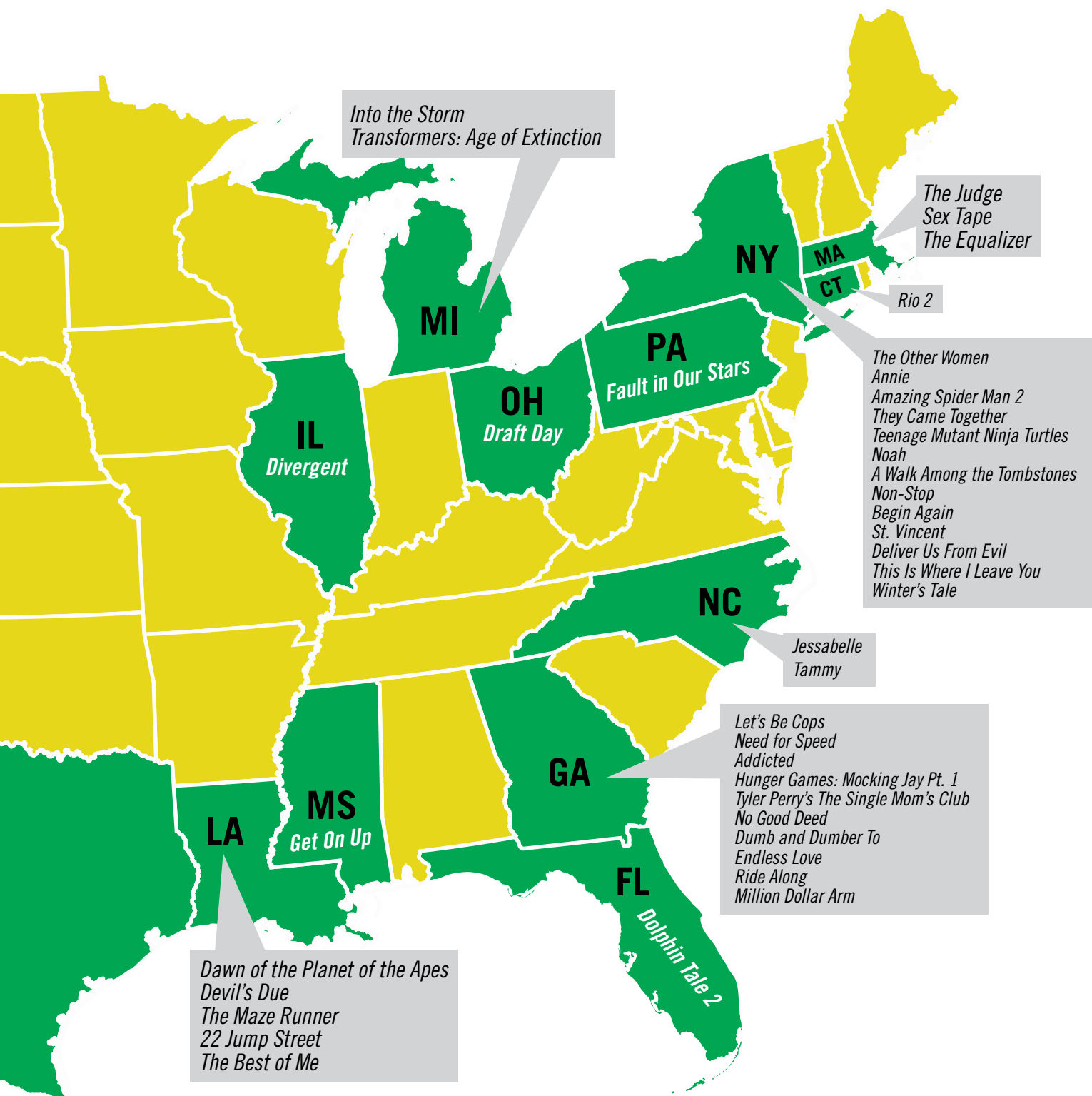
There are now several robust, credible and valuable online databases that offer employment information, budget estimates, shooting locations, studio involvement and box-office performance. Typically, these databases require paid subscriptions. All online databases (paid or unpaid) consulted for this study are listed in the sources section on page 20.

In addition, various spending amounts, budget information and film incentive award amounts for films in this study were reported by credible media outlets and/or disclosed by filmmakers themselves. This information was included to help supplement the study.



MOVIES OF 2014:
PRIMARY UNITED STATES FILMING LOCATIONS





MOVIES OF 2014 (APPENDIX A): LOCATION, SPENDING, AND INCENTIVE LIST

Movie	Budget Est. (millions)	Primary Location	Secondary Locations	Location Spending (where available from public sources)	Incentive Amount	Scoring Location	Primary VFX Location
<i>22 Jump Street</i>	\$66	Louisiana	Puerto Rico	La.: \$58.3 million	La.: \$17.5 million	Los Angeles	Canada
<i>3 Days to Kill</i>	\$28	France	Serbia				Belgium
<i>300: Rise of an Empire</i>	\$110	Bulgaria	California			Los Angeles	Canada
<i>A Million Ways to Die in the West</i>	\$40	New Mexico	Utah			Los Angeles	CA, USA
<i>A Walk Among the Tombstones</i>	\$23	NY					
<i>About Last Night</i>	\$13	California					India
<i>Addicted</i>	\$6	Georgia					CA, USA
<i>Alexander and the Terrible, Horrible, No Good, Very Bad Day</i>	\$28	California				Los Angeles	CA, USA
<i>American Sniper</i>	\$59	California	Morocco	\$54 million	\$6.8 million	AFM	Canada
<i>Annabelle</i>	\$6.5	California				Los Angeles	CA, USA
<i>Annie</i>	\$78	NY			\$11.4 million	Los Angeles	NY, USA
<i>Begin Again</i>	\$9	NY				AFM	NY, USA
<i>Beyond the Lights</i>	\$7	California	UK				CA, USA
<i>Big Eyes</i>	\$10	Canada	San Francisco, California; Hawaii				Canada
<i>Big Hero 6</i>	\$165	California				Los Angeles	Disney Animation
<i>Blended</i>	\$45	South Africa	Atlanta, Georgia			Los Angeles	Canada
<i>Captain America: The Winter Soldier</i>	\$177	California	Washington D.C., USA, Cleveland, Ohio				ILM - Canada/US
<i>Date and Switch</i>	\$6	Canada (Vancouver)					CA, USA
<i>Dawn of the Planet of the Apes</i>	\$235	Louisiana	Vancouver, British Columbia; San Francisco, California.	Louisiana: \$85.1 million (\$17 million on wages)	La.: \$26.4 million	Los Angeles	New Zealand
<i>Deliver Us From Evil</i>	\$30	NY	Abu Dhabi				NY, USA
<i>Devil's Due</i>	\$7	Louisiana	Dominican Republic; France	La.: \$5.7 million	La.: \$1.8 million		
<i>Divergent</i>	\$85	Illinois	California (re-shoots)				Canada
<i>Dolphin Tale 2</i>	\$36	Florida		\$18.3 million	\$5.5 million		Canada
<i>Dracula Untold</i>	\$100	UK				(LA - PREP ONLY)	
<i>Draft Day</i>	\$25	Ohio	New York		Ohio: \$4.29 million		Canada
<i>Dumb and Dumber To</i>	\$50	Georgia	California (Disney Golden Oaks Ranch); Rhode Island				CA, USA
<i>Earth to Echo</i>	\$13	California		\$12.3 million		AFM	California; China Base FX
<i>Edge of Tomorrow</i>	\$178	UK	France, Malta	\$154 million (94 million GBP)	UK: \$31.28 million (21 million GBP)		Canada
<i>Endless Love</i>	\$20	Georgia				Los Angeles	Canada
<i>Enemies Closer</i>	\$5	Bulgaria					
<i>Exodus: Gods And Kings</i>	\$200	UK	Spain, Morocco, Jordan	Spain: \$43 million			London/Singapore
<i>Fault in Our Stars</i>	\$12	Pennsylvania	Amsterdam; Indiana		PA: \$3.5 million	Los Angeles	NY, USA
<i>Fury</i>	\$80	UK		UK: \$73 million (46 million GBP)	UK: \$13.55 million (8.47 million GBP)		California

LOCATION, SPENDING, AND INCENTIVE LIST (CONT.)

Movie	Budget Est. (millions)	Primary Location	Secondary Locations	Location Spending (where available from public sources)	Incentive Amount	Scoring Location	Primary VFX Location
<i>Get On Up</i>	\$30	Mississippi				Los Angeles	Canada
<i>Godzilla</i>	\$160	Canada (Vancouver)	Hawaii, San Francisco & Los Angeles, California; Nevada	Hawaii: \$20.2 million	HI: \$4 million	Los Angeles	Vancouver
<i>Gone Girl</i>	\$50	California	Missouri; Illinois	MS: \$7.8 million	MS: \$2.3 million	Los Angeles	Mexico; Canada
<i>Guardians of the Galaxy</i>	\$170	UK		\$141 million (91M Pounds)	UK: \$22 million (14M GBP)		London, UK
<i>Heaven is for Real</i>	\$12	Canada (Manitoba)				Los Angeles	CA, USA
<i>Hercules</i>	\$100	Romania	Croatia; Hungary				London
<i>Horrible Bosses 2</i>	\$57	California		\$57.3 million		Los Angeles	CA, USA
<i>How to Train Your Dragon 2</i>	\$145	California					Dreamworks Animation
<i>I, Frankenstein</i>	\$65	Australia					Australia
<i>If I Stay</i>	\$11	Canada (Vancouver)				Los Angeles	CA, USA
<i>Inherent Vice</i>	\$20	California					CA, USA
<i>Interstellar</i>	\$165	California	Alberta, Canada; Iceland				London; Los Angeles
<i>Into the Storm</i>	\$50	Michigan		MI: \$31.6 million	MI: \$9.4 million	Los Angeles	CA, USA
<i>Into the Woods</i>	\$50	UK					
<i>Jack Ryan: Shadow Recruit</i>	\$60	UK	New York; Canada				London
<i>Jersey Boys</i>	\$58.6	California		\$58.6 million		Los Angeles	Canada
<i>Jessabelle</i>	\$4	North Carolina	New Orleans, Louisiana, USA	\$4.1 million (\$2.2 million on wages); 208 jobs	\$1.02 million		
<i>Leprechaun: Origins</i>	-	Canada (Vancouver)					
<i>Let's Be Cops</i>	\$17	Georgia	Los Angeles, CA			Los Angeles	Canada
<i>Maleficent</i>	\$263	UK		UK: \$156 million (99M GBP)	UK: \$37 million (\$25.3M GBP)		UK; Canada
<i>Men, Women & Children</i>	-	Texas					
<i>Million Dollar Arm</i>	\$25	Georgia	India; Los Angeles, CA	GA: \$13 million	GA: \$3.9 million est.	Los Angeles	CA, USA
<i>Mr. Peabody & Sherman</i>	\$145	California					Dreamworks Animation
<i>Muppets Most Wanted</i>	\$68	UK	Hollywood, California		\$10 million	Los Angeles	
<i>Need for Speed</i>	\$66	Georgia/Michigan	Mendocino County, California 3/26/13-4/15/14; Detroit, MI: June 2013; Utah: July 2013 (8 days)	MI: \$3.058 million CA: \$2.97 million	MI: \$1 million	Los Angeles	Los Angeles
<i>Neighbors</i>	\$18	California	Los Angeles, California, USA			(LA - PREP ONLY)	CA, USA
<i>Night at the Museum: Secret of the Tomb</i>	\$127	Canada (Vancouver)	United Kingdom; New York City			Los Angeles	
<i>No Good Deed</i>	\$13	Georgia					Canada; Los Angeles
<i>Noah</i>	\$125	NY	Iceland; California	NY: \$60.5 million		Los Angeles	CA, USA
<i>Non-Stop</i>	\$50	NY	Los Angeles, CA				Canada
<i>Nurse 3D</i>	\$10	Canada (Toronto)					Canada
<i>One Chance</i>	\$12	UK	Italy				

LOCATION, SPENDING, AND INCENTIVE LIST (CONT.)

Movie	Budget Est. (millions)	Primary Location	Secondary Locations	Location Spending (where available from public sources)	Incentive Amount	Scoring Location	Primary VFX Location
<i>Ouija</i>	\$8	California		\$7.9 million		(LA - PREP ONLY)	CA, USA & NC, USA
<i>Paddington</i>	\$55	UK					UK
<i>Paranormal Activity: The Marked Ones</i>	\$9.2	California					CA, USA
<i>Penguins of Madagascar</i>	\$135	California					Dreamworks Animation
<i>Planes: Fire and Rescue</i>	\$50	India				Los Angeles	Disney Animation
<i>Reclaim</i>	-	Puerto Rico					Canada
<i>Ride Along</i>	\$25	Georgia	Los Angeles, CA			Los Angeles	CA, USA
<i>Rio 2</i>	\$103	Connecticut				Los Angeles	Blue Sky Animation Connecticut
<i>RoboCop</i>	\$100	Canada (Toronto)	Detroit, Michigan				London; Los Angeles
<i>School Dance</i>	-	California					CA, USA
<i>Sex Tape</i>	\$40	Massachusetts	Los Angeles, California				Boston, USA
<i>Son of God</i>	\$22	Morocco				AFM	
<i>St. Vincent</i>	\$13	NY					
<i>Step Up All In</i>	\$7	Canada (Vancouver)	Las Vegas, Nevada, USA				
<i>Tammy</i>	\$20	North Carolina	Kentucky, New York	\$14.5 million (\$8 million on wages) and 382 jobs.	NC: \$3.6 million		Los Angeles
<i>Teenage Mutant Ninja Turtles</i>	\$125	NY	Los Angeles, California	NY: \$55 million		Los Angeles	ILM San Francisco; Canada
<i>The Amazing Spider-Man 2</i>	\$293	NY	California	NY: \$150 million; Vancouver, Canada (VFX) \$13.2 million CN	Canada: \$6.6 million	Los Angeles	Canada
<i>The Best of Me</i>	\$26	Louisiana	Wilmington, North Carolina	La.: \$19.5 million	La.: \$5.85 million	Los Angeles	Canada
<i>The Equalizer</i>	\$73	Massachusetts			\$14 million	Los Angeles	Boston, USA
<i>The Gambler</i>	\$31	California		\$30.9 million	\$3.8 million	Los Angeles	London
<i>The Giver</i>	\$25	South Africa				Los Angeles	London
<i>The Hobbit: The Battle of the Five Armies</i>	\$250	New Zealand	UK		NZ: \$41 million		New Zealand
<i>The Hundred-Foot Journey</i>	\$22	France	India				Canada
<i>The Hunger Games: Mockingjay, Part 1</i>	\$140	Georgia	France, Germany, California				London
<i>The Interview</i>	\$42	Canada (Vancouver)	New York				Canada
<i>The Judge</i>	\$45	Massachusetts	Pennsylvania			Los Angeles	NY, USA
<i>The Lego Movie</i>	\$60	Australia				Los Angeles	Australia
<i>The Maze Runner</i>	\$34	Louisiana		\$24.6 million	\$7.4 million		Vancouver
<i>The Monuments Men</i>	\$91	Germany	United Kingdom		\$16 million	Los Angeles	London
<i>The Other Woman</i>	\$40	NY					NY, USA
<i>The Purge: Anarchy</i>	\$11	California		\$10.6 million	\$2.2 million	Los Angeles	London
<i>They Came Together</i>	\$3	NY	California			(LA - PREP ONLY)	
<i>Think Like A Man Too</i>	\$24	Nevada					India
<i>This is Where I Leave You</i>	\$20	NY					NY, USA
<i>Transcendence</i>	\$100	New Mexico	Los Angeles, California			Los Angeles	London

LOCATION, SPENDING, AND INCENTIVE LIST (CONT.)

Movie	Budget Est. (millions)	Primary Location	Secondary Locations	Location Spending (where available from public sources)	Incentive Amount	Scoring Location	Primary VFX Location
<i>Transformers: Age of Extinction</i>	\$210	Michigan	Austin, Texas; Detroit, Michigan, Chicago, Illinois; Hong Kong; Washington; Arizona	MI: \$58.7 million	MI: \$16.78 million		CA, USA
<i>Tyler Perry's The Single Moms Club</i>	\$8	Georgia				Los Angeles	CA, USA
<i>Unbroken</i>	\$65	Australia				Los Angeles	Canada
<i>Vampire Academy</i>	\$30	UK					
<i>Winter's Tale</i>	\$75	NY		NY: \$41 million			CA, USA
<i>X-Men: Days of Future Past</i>	\$205	Canada	Montreal, Quebec, Canada			Los Angeles	Canada

SOURCES:

Annual Film Tax Credit/Transparency Reports:

British Columbia
 Connecticut
 Florida
 Hawaii
 Louisiana
 Massachusetts
 Michigan
 Missouri
 New York
 New Zealand
 North Carolina
 Ontario
 Pennsylvania
 Quebec
 Texas
 United Kingdom
 Utah

Online databases:

Baseline Studio System
 Box Office Mojo
 IMDbPro

Other:

Allen Maris, Visual Effects Producer
 The Animation Guild, I.A.T.S.E. Local 839
 American Federation of Musicians, Local 47
 British Columbia Film & Media
 British Film Institute
 California Film Commission
 Canadian Media Production Association
 Connecticut Department of Economic Development
 DreamWorks Animation
 Los Angeles Economic Development Corporation
 Louisiana Department of Economic Development
 Major news & media outlets
 Motion Picture Association of America
 Screen Australia
 Steve Kaplan, The Animation Guild
 Walt Disney Pictures
 Warner Bros.



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