



2016
FEATURE FILM STUDY





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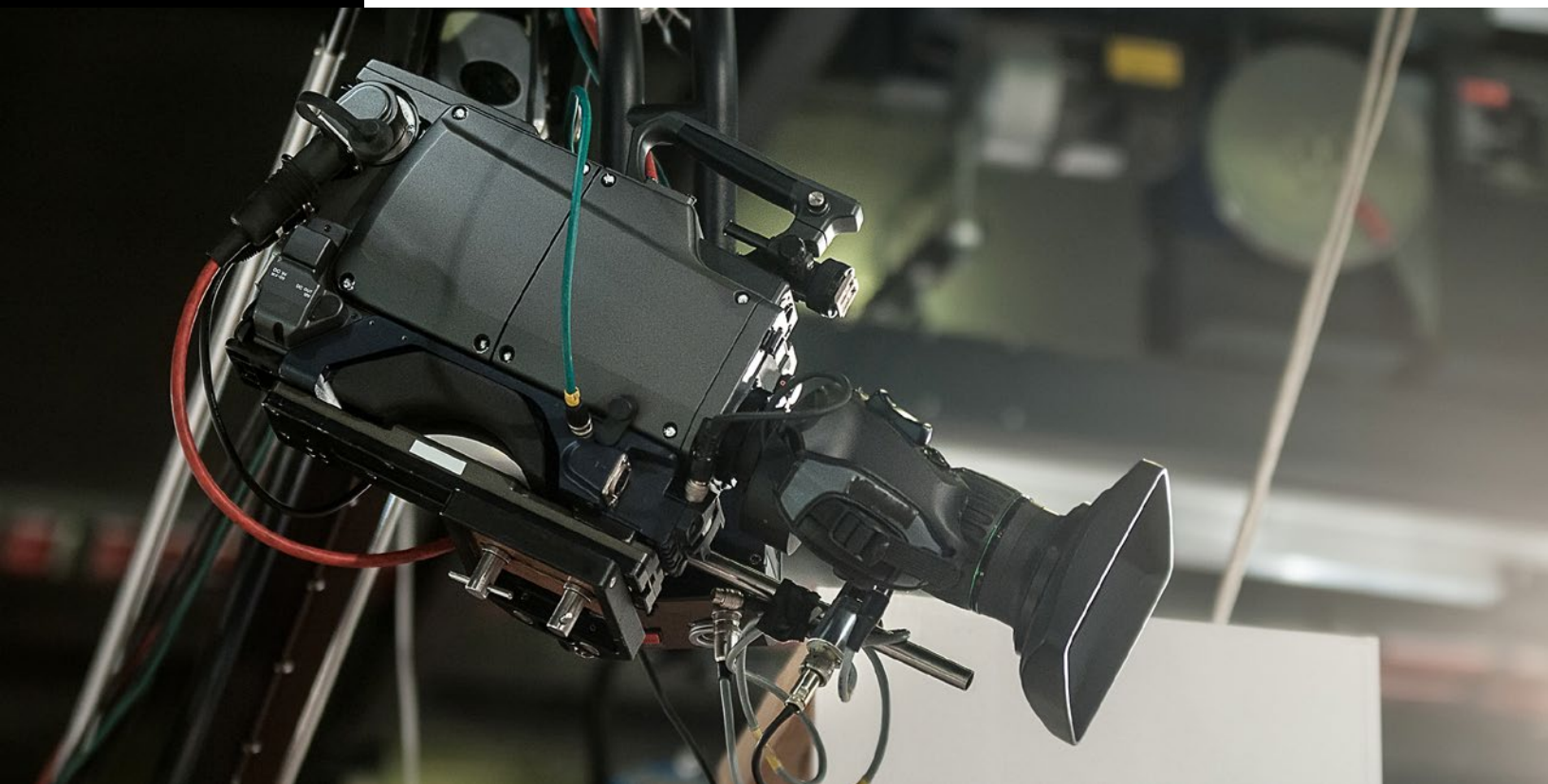
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ABOUT THIS REPORT

For the last four years, FilmL.A. Research has tracked the movies released theatrically in the U.S. to determine where they were filmed, why they filmed in the locations they did and how much was spent to produce them. We do this to help businesspeople and policymakers, particularly those with investments in California, better understand the state's place in the competitive business environment that is feature film production.

For reasons described later in this report's methodology section, FilmL.A. adopted a different film project sampling method for 2016. This year, our sample is based on the top 100 feature films at the domestic box office released theatrically within the U.S. during the 2016 calendar year.

Outside of this change in sampling, the 2016 Feature Film Study follows the same basic approach as prior reports and analyzes the following data for included films:

- Primary and secondary filming locations
- Primary and secondary locations for post-production/visual effects (VFX) work
- The number of films that scored music within California
- Production spending and filming jobs created

In determining the primary production location of a given film, the overriding factor was where the production spent most of its reported budget. This is sometimes a more complex activity than it may seem.

For example, Disney's "live-action" remake of *The Jungle Book*, with a budget over \$175 million that did all of its live-action filming on bluescreen stages at Los Angeles Center Studios. However, because most of the film's environments and animal characters were created digitally, the vast majority of the budget and production hours were spent at visual effects (VFX) vendors like MPC® (based in the UK & India) and Weta Digital™ (New Zealand). Of the 1,674 credited positions on the film, 1,174 (70 percent) of the jobs were in animation and VFX.

Since the determining factor on which location served as the primary production center is where the largest portion of the budget was spent, FilmL.A. did not count *The Jungle Book* as a California film, despite capturing all of the live-action filming.

The 100 films in this year's sample set included 12 animated and 88 live-action projects. Almost half of the films completed production in 2015, 19 in 2016 and nine completed production in 2014. The reported budgets of the 100 films (see **Appendix A** for complete list) ranged from \$3.5 million to \$300 million. The average production budget in the sample was \$75.4 million.

The films in this study also represent over \$7.5 billion in direct production spending and tens of thousands of high-wage jobs in a wide array of professions. This is notable, as it exceeds the total budgets in each of the last two feature film studies, which included nine more films in 2015 and six more films in 2014. It's also just \$100 million short of the \$7.6 billion spent by the 108 films in the 2013 Feature Film Study. There were 33 films with budgets of \$100 million or more in 2016, which is the highest number of \$100+ million films observed in the past four years.

TABLE 1:
COMPARISON OF PROJECT COUNTS & BUDGET INFO IN FILML.A. FEATURE FILM STUDIES

| | 2016 | 2015 | 2014 | 2013 |
|---------------------------|----------------------|--------------------|----------------------|----------------------|
| No. of Surveyed Movies | 100 | 109 | 106 | 108 |
| No. of \$100M + Movies | 33 | 26 | 20 | 31 |
| Total Budget Value | \$7.5 billion | \$7 billion | \$6.3 billion | \$7.6 billion |

Total box-office revenues reached a record high in 2016, with global box office ticket sales hitting \$38.6 billion.¹ Despite more than 700 movies released in 2016, a relative handful accounted for most of the global revenue. The top 50 films of 2016 pulled in \$22.1 billion worldwide; the top 25 films raked in almost \$16.4 billion and just the top five films took in \$5.2 billion.² In 2016, only one of the top 25 films at the worldwide box-office had a budget below \$50 million.

¹ 2016 Theatrical Market Statistics, Motion Picture Association of America: http://www.mpa.org/wp-content/uploads/2017/03/MPAA-Theatrical-Market-Statistics-2016_Final.pdf

² 2016 Worldwide Grosses, Box Office Mojo: <http://www.boxofficemojo.com/yearly/chart/?view2=worldwide&yr=2016&p=.htm>

FILMING LOCATIONS

While Southern California and Hollywood are considered by many as the traditional home of moviemaking, today's film industry is a worldwide enterprise. Today, feature films produced by U.S. companies are filmed across 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 13 different U.S. states and nine foreign countries were used as primary production locations among this study's 100 films.

Several years ago, under the methodology used in prior FilmL.A. reports, Louisiana made national news when it hosted more of the major feature films released in 2013 than any other location worldwide.

Fast forward to 2016, and it is another Southern U.S. state that finds itself in the top spot. Under the new approach, the State of Georgia hosted primary production for 17 of the top 100 domestic films released in 2016.

TABLE 2:
NUMBER OF TOP 100 DOMESTIC FILMS PRODUCED BY LOCATION

| PRODUCTION CENTER | 2016 | 2015 | 2014 | 2013 |
|-------------------|------|------|------|------|
| Georgia | 17 | 13 | 8 | 9 |
| UK | 16 | 15 | 12 | 9 |
| Canada | 13 | 11 | 7 | 16 |
| California | 12 | 14 | 21 | 16 |
| Louisiana | 6 | 9 | 6 | 15 |
| New York | 6 | 7 | 12 | 4 |
| Massachusetts | 5 | 3 | 2 | 4 |
| Australia | 4 | 1 | 2 | 2 |
| New Mexico | 3 | 2 | 1 | 2 |
| France | 2 | 1 | 3 | 2 |
| Florida | 2 | 0 | 1 | 1 |
| New Zealand | 1 | 1 | 1 | 2 |
| Malta | 2 | 0 | 0 | 1 |
| Michigan | 1 | 0 | 2 | 1 |
| Italy | 2 | 0 | 0 | 0 |
| Oregon | 1 | 0 | 0 | 0 |
| Pennsylvania | 1 | 6 | 1 | 1 |
| Rhode Island | 1 | 0 | 0 | 0 |
| Japan | 1 | 0 | 0 | 0 |
| Hungary | 2 | 2 | 0 | 0 |
| Hawaii | 1 | 1 | 0 | 0 |
| Connecticut | 1 | 1 | 0 | 0 |

Compared to the rankings using the new methodology in the chart above, there were some differences in the project count rankings under FilmL.A.'s prior methodology. Under the new method illustrated above, Canada and California were tied for the top location in 2013. However, under the old methodology, Louisiana was the top location in 2013. Similarly, the United Kingdom (UK) was the top location in 2015 under the new methodology whereas California held that spot under the old methodology.

FILMING LOCATIONS (CONTINUED)

TABLE 3:

RANKING OF TOP PRODUCTION CENTERS, UNDER PREVIOUS FILML.A. METHODOLOGY

| RANK | 2015 | 2014 | 2013 |
|-----------------|------------------------------|----------------------|------------------------------|
| 1 st | California (19 films) | California (22) | Louisiana (18) |
| 2 nd | UK (15) | New York (13) | Canada (15), California (15) |
| 3 rd | Georgia (12), Louisiana (12) | Canada (12), UK (12) | UK (12) |
| 4 th | Canada (11) | Georgia (10) | Georgia (9) |
| 5 th | New York (7) | Louisiana (5) | New York (4) |

The UK hosted 16 movies in 2016, their best showing in the last four years. More importantly, the UK ranked first in total budget value and budget spend within its borders for the second year in a row.

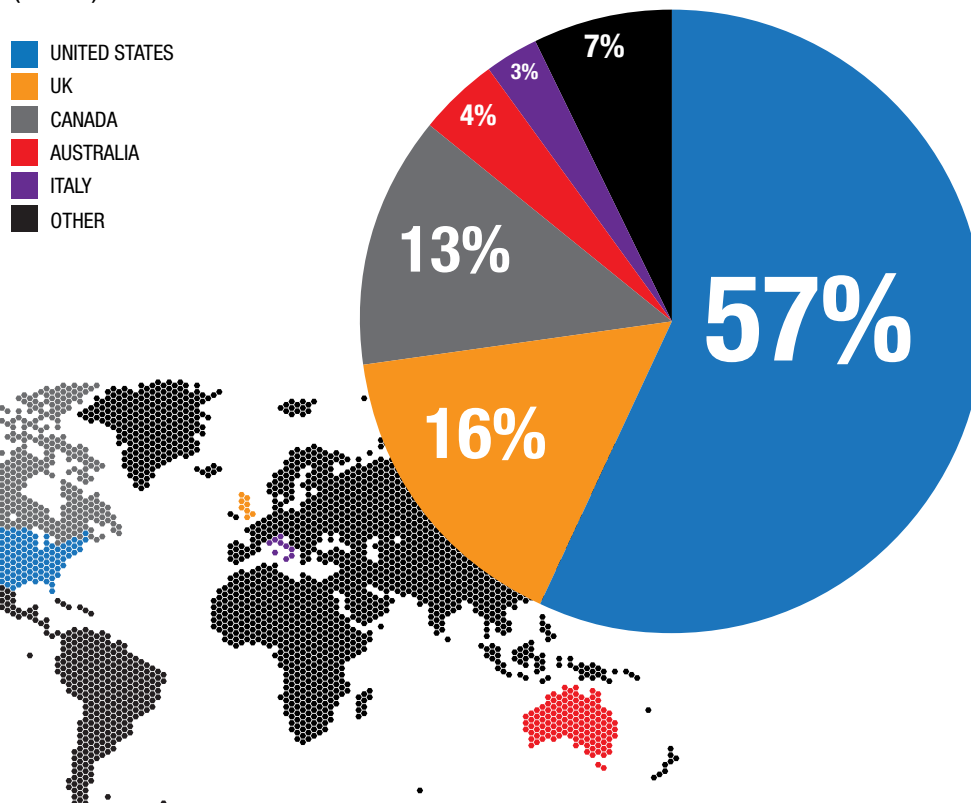
Canada had its strongest showing in the past three years, with 13 movies produced primarily in the country. Within Canada, the leading province was British Columbia (8 movies), followed by Ontario (3 movies) and Quebec (2 movies).

New York's strong showing in 2014—when the state ranked second—did not recur. While the Empire State is still the nation's second largest film & television production center, it has been unable to capture a significant share of major theatrical films.

With the annual cap and other restraints placed on its film incentive program in 2015, Louisiana has been unable to reclaim the leading position it held in 2013. Despite these challenges, Louisiana tied with New York to round out our list of top production centers.

From a national perspective, the United States served as the primary production location for 57 percent of the top 100 films at the domestic box office in 2016. This is the lowest share for the U.S. since FilmL.A. began tracking in 2013. In the prior three years, the U.S. share ranged from 64-67 percent.

INTERNATIONAL SHARE OF TOP 100 SURVEYED FILMS (2016)



GEORGIA IN FOCUS

Earlier this year, Georgia Governor Nathan Deal declared 2017 “the year of Georgia film.” The truth is, the state actually claimed this title the year prior, in 2016. The rapid growth of the film and television industry in Georgia and the state’s steadfast commitment to its support is remarkable. With 17 projects in 2016, the first-ranked Peach State hosted nearly three times as many feature films as fifth-place New York and Louisiana.

This is almost certainly due to the state’s record investment in film attraction. As the most recent Georgia Governor’s Office of Planning and Budget Report shows, Georgia set another record for spending on its incentive program last year. According to the report,³ the cost of Georgia’s film tax credit in terms of credits issued was \$606 million in FY2016, which is the largest amount spent by any jurisdiction in North America or Europe on a film tax credit program in a single year. This breaks the previous record of \$504 million, which is what Georgia spent on its program in FY2015.

By way of comparison, it took Louisiana more than ten years to spend \$1 billion on its film incentive program; Georgia spent \$1.11 billion in only two. In fact, since FY2013, Georgia has spent just over \$1.77 billion in issued credits.

Viewed from a national perspective, Georgia helped the United States’ film industry maintain its dominance over many international competitors who could otherwise have been the beneficiary of the jobs and production spending generated by these feature projects.

³ Georgia Governor’s Office of Planning and Budget, “Performance Measures Report”, Fiscal Year 2018, page 33. https://opb.georgia.gov/sites/opb.georgia.gov/files/related_files/site_page/FY%202018%20Performance%20Measure%20Report.pdf

CALIFORNIA IN FOCUS

California ranked fourth among all locations for feature films included in this survey. California hosted primary production of 12 (5 animated & 7 live-action) of the surveyed films. The lingering effect of California’s original film incentive program and the first impacts of the state’s new and improved incentive program were observed in 2016. Three of the surveyed films released in 2016 received California film tax credits. One film (*Ouija: Origin of Evil*) received tax credits under the original program and two of the films (*The Conjuring 2* and *Why Him?*) received credits under the expanded California Film & Television Tax Credit 2.0 Program. By comparison, seven surveyed films received the California incentive in 2015, eight in 2014 and five in 2013.

While the impact of the expanded California incentive may not register in this report (which is limited to films in the top 100 at the box office), the incentive’s impact was felt in California in 2016. On-location feature film production in Greater Los Angeles registered 4,865 Shoot Days (SDs) in 2016, an increase of 12 percent over the prior year and the best showing for the category in seven years. Since 2010, which was the first year California’s original film incentive took effect, on-location feature film production in the Los Angeles region increased 33 percent.

Generally speaking, California remains at a disadvantage in attracting the most expensive feature film projects. Most of the movies that rank in the top 25 at the domestic box office (a quarter of the surveyed films) have budgets over \$150 million; just six of the top 25 films in 2016 had budgets below \$100 million. According to the California Film Commission, the California Film & Television Tax Credit 2.0 Program is optimized for use by productions with budgets in the \$40 million to \$100 million range.

TABLE 4:
CALIFORNIA FILM & TELEVISION TAX CREDIT RECIPIENTS

| CA TAX CREDIT PROJECT | CA Spend (million) | Extras | Crew | Cast |
|------------------------------|---------------------|--------------|------------|-----------|
| <i>Ouija: Origin of Evil</i> | \$11,714,566 | 2,642 | 99 | 19 |
| <i>The Conjuring 2</i> | \$35,607,115 | 685 | 125 | 36 |
| <i>Why Him?</i> | \$52,249,828 | 1,823 | 175 | 28 |
| TOTAL | \$99,571,509 | 5,150 | 399 | 83 |

CALIFORNIA IN FOCUS (CONTINUED)

The four live-action films produced primarily in California that did not receive the incentive include three projects with budgets over \$20 million (*La La Land*, \$30 million; *Hail, Caesar!*, \$22 million; *Sully*, \$60 million). Two of the films had strong creative reasons for shooting in California, with the Coen Brothers' *Hail, Caesar!* paying homage to 1950s Hollywood and *La La Land* to Hollywood dreams in 2016. The obvious creative concerns, not to mention an insistence on shooting in Los Angeles by the filmmakers, helped keep both productions in California.

For *Sully*, California's infrastructure advantage gave it the edge over New York (which is the primary setting of the film and where some filming took place) and Georgia (where many interior scenes were shot). Since a large—and costly—part of the film involved a simulated plane crash and water evacuation scenes, the large stages at Warner Bros. Studios and, more importantly, the Falls Lake set at Universal Studios were indispensable for filming.

The other live-action film produced primarily in California without an incentive was *Lights Out*, which had one of the smallest budgets (\$5 million) of the 100 surveyed films in this study. As noted in previous FilmL.A. studies, incentives in other locations are often not lucrative enough to attract smaller projects with budgets of \$10 million or less, which would have to incur additional travel, lodging and shipping costs if they left the state. The remaining five films produced primarily in California were animated movies. The importance of these projects shouldn't be overlooked. While the five animated films represent less than half of California's project count, they account for 78 percent (\$770 million) of the total budget value (\$991 million) for all 12 California movies in this survey.

In each of the past two years, California captured half or more of the animated films released theatrically. In 2016, however, California's five animated films represent just 42 percent of animated projects in this study. Competing locations, specifically British Columbia (3 animated films) and France (2 animated films), hosted major animated projects in 2016 (including *The Secret Life of Pets* and *Sing*) with a combined budget value of more than \$300 million. Some competing locations, like British Columbia, have production incentives specifically targeted at animated projects.

Moving forward, policymakers in California should keep a wary eye on the health of California's animation industry, as its future in the state is far from guaranteed.

For the second year in a row, California did not benefit from a single major live-action film with a budget of \$100 million or more. In fact, the largest live-action movie budget spent in California was *Why Him?*, which spent \$52 million in the state.

California's Film & Television Tax Credit was significantly enhanced towards the end of 2014. Beginning in 2015, the annual cap was increased to \$330 million, with 35 percent of total funding allocated solely for feature films. More importantly, features with budgets over \$75 million are eligible to apply for the new incentive, which will only apply to the first \$100 million of the film's budget.

Thus far, just three of the feature film recipients of the new film tax credit in California have reported a budget over \$100 million and only one, *A Wrinkle in Time* (set for a 2018 release), has completed production. Since the new program only began to take effect in late summer of 2015, film projects selected under the improved incentive could not have begun production until after July 2015. Moving forward, California should see an increase of feature films filming in the state because of the enhanced incentive. If these films perform well at the box office, they'll show up in future editions of this report.

Photo: MrPhotoMania / Shutterstock.com





FILM PRODUCTION: ECONOMIC IMPACT

TABLE 5:
KEY PRODUCTION SPENDING CATEGORIES
FOR \$55 MILLION FEATURE FILM

From an economic standpoint, a much more important number than project count is total production spending, which represents the direct spend by the productions on wages, services and goods. Total production spending also creates a ripple effect in the economy. This generates indirect and induced economic impacts that can positively affect people and businesses not personally employed in the film industry.

In California, these impacts have a greater effect than in other locations with less developed film industries. According to the Los Angeles Economic Development Corporation (LAEDC), after more than 100 years in California, the state's film industry has "deep and broad supplier networks with vast linkages" in the local economy. Moreover, given the large and diversified California economy, the state can supply most of the goods and services that households and businesses in other industries purchase, meaning "there is less leakage of indirect and induced buying dollars out of the state."

To illustrate the impact of direct production spending, FilmL.A. obtained access to detailed budget breakdowns for several feature films released within the last five years. We present two of these breakdowns in the following pages. For confidentiality, the name of the films and the producing studios have been withheld. The first production budget (see **Table 5**) is for a \$55 million film.

| PRODUCTION BUDGET CATEGORY | COST |
|-----------------------------------|---------------------|
| Story - Rights & Continuity | \$4,072,488 |
| Producers | \$4,648,202 |
| Direction | \$578,866 |
| Cast | \$5,237,877 |
| Travel & Living | \$875,360 |
| Above-The-Line Fringe Benefits | \$889,166 |
| TOTAL ABOVE-THE-LINE COSTS | \$16,301,959 |
| Production Staff | \$1,656,442 |
| Extra Talent | \$485,248 |
| Set Design | \$708,083 |
| Set Construction | \$2,144,591 |
| Set Striking | \$111,035 |
| Set Operations | \$1,379,295 |
| Special Effects | \$576,700 |
| Set Dressing | \$1,150,553 |
| Property | \$479,841 |
| Pictures Vehicles & Animals | \$870,373 |
| Wardrobe | \$849,823 |
| Makeup & Hairdressing | \$519,592 |
| Lighting | \$971,214 |
| Camera | \$1,190,525 |
| Production Sound | \$274,738 |
| Transportation | \$2,027,474 |
| Location Expenses | \$3,078,619 |
| Production Film & Lab | \$277,841 |
| Second Unit | \$500,000 |
| Tests | \$50,000 |
| Stage / Facilities | \$210,000 |
| Production Fringe Benefits | \$4,003,219 |
| TOTAL PRODUCTION | \$23,515,206 |
| Special Photo Effects | \$6,730,000 |
| Film Editing | \$1,914,171 |
| Music | \$2,219,260 |
| Post Production Sound | \$1,646,100 |
| Post Production Film & Lab | \$683,760 |
| Main & End Titles | \$100,000 |
| Post Production Fringes | \$565,827 |
| TOTAL POST PRODUCTION | \$13,859,118 |
| Publicity – Screenings | \$120,000 |
| Insurance | \$556,046 |
| General Expenses | \$182,309 |
| TOTAL OTHER | \$858,355 |
| TOTAL BELOW-THE-LINE | \$38,232,679 |
| TOTAL DIRECT COST | \$55,000,000 |

| PRODUCTION BUDGET CATEGORY | COST |
|-----------------------------------|----------------------|
| Story - Rights & Continuity | \$10,000,000 |
| Producers | \$4,000,000 |
| Direction | \$7,200,000 |
| Cast | \$39,500,000 |
| Travel & Living | \$3,000,000 |
| Above-The-Line Fringe Benefits | \$2,700,000 |
| TOTAL ABOVE-THE-LINE COSTS | \$64,400,000 |
| Production Staff | \$5,400,000 |
| Extra Talent | \$3,000,000 |
| Set Design | \$3,700,000 |
| Set Construction | \$19,000,000 |
| Set Operations | \$7,400,000 |
| Special Effects | \$6,900,000 |
| Set Dressing | \$8,500,000 |
| Property | \$1,500,000 |
| Pictures Vehicles & Animals | \$2,600,000 |
| Wardrobe | \$8,700,000 |
| Makeup & Hairdressing | \$2,200,000 |
| Lighting | \$7,100,000 |
| Camera | \$4,200,000 |
| Production Sound | \$769,000 |
| Transportation | \$10,600,000 |
| Location Expenses | \$13,800,000 |
| Production Film & Lab | \$1,400,000 |
| Second Unit | \$10,400,000 |
| Tests | \$150,000 |
| Stage / Facilities | \$3,800,000 |
| Production Fringe Ben. | \$19,800,000 |
| TOTAL PRODUCTION | \$141,000,000 |
| VFX | \$60,000,000 |
| Film Editing | \$6,100,000 |
| Music | \$4,500,000 |
| Post Production Sound | \$2,500,000 |
| Post Production Film & Lab | \$10,000,000 |
| Main & End Titles | \$350,000 |
| Post Production Fringes | \$2,000,000 |
| TOTAL POST PRODUCTION | \$85,450,000 |
| Insurance | \$1,600,000 |
| General Expenses | \$400,000 |
| TOTAL OTHER | \$2,000,000 |
| TOTAL BELOW-THE-LINE | \$228,450,000 |
| TOTAL DIRECT COST | \$295,500,000 |

TABLE 6:
KEY PRODUCTION SPENDING CATEGORIES
FOR \$295 MILLION FEATURE FILM

Comparing the \$55 million mid-level budget movie to that of a major tent pole movie with a budget of \$295 million (Table 6) reveals some stark contrasts. For example, the \$60 million budget just for the VFX on the tent pole project is greater than the cost of the entire mid-level film.

The other notable takeaway is that the tent pole film spent more (29 percent) of its budget on VFX & post production than it did on above-the-line costs (22 percent). By comparison, the mid-level film spent slightly more on above-the-line costs (28 percent) than it did on VFX & post production (26 percent).

FILM PRODUCTION: BUDGETS AND SPENDING

Determining where filmmakers spend their budgets is very difficult, given that full production budgets are rarely disclosed. Complicating matters further, most feature films produced today use multiple jurisdictions throughout every stage of development. One of the challenges when determining the total budget for a given movie (especially when shot in a location that does not provide project level detail in its incentive program) is that some budget estimates that are reported in the press reflect the net cost to the studio, and not necessarily the full amount spent to make the project.

A good example of this is the 2015 film *Daddy's Home*⁴, which was reported in industry trade publications as having a \$50 million budget. For the studio, this amount is fairly precise, as the out of pocket cost for the studio itself was \$53 million. However, the gross (i.e. actual) cost of the film was \$69 million. The other \$16 million of the actual cost was financed by Louisiana's film incentive.

For the dozens of films FilmL.A. has surveyed over the last four years where final confirmed budgets were available, the vast majority of reported budget estimates in industry trades and other news publications for these same films underestimated the actual cost of the film. The proliferation of film incentives across the world has given researchers some valuable tools to address budget data gaps. The quality and detail level of publicly available information among the top production locations varies.

The California Film Commission (CFC) maintains a database that lists each individual project receiving the California Film & Television Tax Credit. The CFC discloses information about the number of shoot days, the number of crew, cast and background jobs created and the total amount of qualified spending for each production, as well as the amount of tax credits each production received.

For this report, precise in-state spend amounts for the three films that received the California Film & Television Tax Credit were provided by the CFC. For other films, FilmL.A. either obtained the exact California spend from filmmakers and/or studio representatives, or made an independent calculation from in-state spending benchmarks sourced from the Los Angeles County Economic Development Corporation (LAEDC).

According to LAEDC, 90 percent of all production spending on live-action production in California is wholly sourced from within the state. For projects that were produced in California without an incentive or where the actual spend was not confirmed by the studio or filmmakers, FilmL.A. applied the LAEDC ratio to determine the California spend.

California was fortunate to have five of the major animated films released in 2016 (*Zootopia*, *Moana*, *Trolls*, *Finding Dory* and *Kung Fu Panda 3*). The combined budget value of the five animated films was \$770 million, which is a majority (78 percent) of the total budget value for films shot in the state. Since only a significant portion of work on one of the animated films was reportedly done outside of the state, California was the beneficiary of virtually all money spent producing the five animated films.






Louisiana's Department of Economic Development (LDED) maintains an online database with detailed project-level information on total budget, amount spent in Louisiana, amount spent on payroll and total tax credits awarded. The state is generous in providing access to this information upon request. While Louisiana lists the total number of jobs supported by each production, it does not break the jobs out by categories like cast or crew like California does. Unlike California, Louisiana does list the total budget for each project, which allows for the exact share of Louisiana's budget spend to be calculated.

In **Canada** and the **UK**, government agencies and film commissions that report on production activity do not typically 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. Spend information for many films produced in the UK are available from their company filings. Specific spend amounts for major films produced in Canada (*Suicide Squad*, *Star Trek Beyond*, *Deadpool*, *X-Men: Apocalypse*) were made available in press releases about economic impact from the Motion Picture Association in Canada.

⁴ Final audited production budget information was provided by the Louisiana Economic Development Department

The only data released by the **Georgia Department of Economic Development (GDED)** is the total aggregate spending via their annual reports. On rare occasion, project-specific spending information for Georgia projects is released to news outlets. Unlike the aggregated data in Canada or the UK, the total direct spend for Georgia is not broken out by specific production categories (i.e. feature films, commercials, television series etc.), nor on a project-by-project basis. This required FilmL.A. to consult other sources to determine Georgia's share of spending for this report.

TABLE 7:
TOTAL MOVIE BUDGET VALUES VS. ACTUAL SPEND IN TOP LOCATIONS⁵ IN 2016

| PRODUCTION CENTER | Movies | Budget Value (millions) | Amount/Percent Spent in Location |
|--|--------|-------------------------|----------------------------------|
| Georgia  | 17 | \$950.2 | \$476.4 (50%) |
| UK  | 16 | \$1,885 | \$1,112 (59.5%) |
| Canada  | 13 | \$1,136.5 | \$651 (57%) |
| California  | 12 | \$991 | \$851.2 (86%) |
| Louisiana  | 6 | \$406 | \$318 (78%) |

So where was the most money spent on feature production among sampled films in 2016?

In terms of total production value⁶, Canada and the UK outperformed California.

On the more important metric of actual production spend in each location, California was second only to the UK, with \$851.2 million spent in the state.

Finally, in terms of the share of total budget value spent in the location, California ranked first with 86 percent.

⁵ Percentage sources: 2016 British Film Institute Statistical Yearbook; CMPA Profile 2016 Report; UK Companies House filings for *The Jungle Book*, *Alice Through the Looking Glass*, *Allied*, *Assassins Creed*, *Doctor Strange*, *Jason Bourne*, *London Has Fallen*, *Now You See Me 2*, *Star Wars: Rogue One*, and *The Huntsman Winter's War*. Georgia's spending estimate stems from a 2010 economic impact report commissioned by the MPAA and prepared by Meyer's Norris Penny (MNP) and exact spend information for *Almost Christmas*, *Miracles From Heaven*, *Neighbor's 2*, *The 5th Wave*, *The Accountant*, *Divergent: Allegiant* and *Captain America: Civil War*, obtained from press sources.

⁶ Total budget value is the value of the combined budgets for projects that shoot in a particular location. It is not the amount actually spent by those productions in that location.



FILM PRODUCTION: JOBS

In the U.S., 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 makes comparing job growth across jurisdictions a heavy challenge.

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 jurisdictions would count this as two jobs.

Officials in some states prefer to calculate the number of Full Time Equivalent (FTE) jobs created by local filming. A head count of 1,000 workers may result in 300 FTE jobs, for example.

New Mexico and Georgia use a different approach altogether and report the number of film “work days.” Both states report this number in the aggregate, making it impossible to know how many worker days a given movie generates. Providing the total number of worker days also allows for an estimate of the number of FTE jobs.

For example, the Georgia Governor’s Office of Planning and Budget report shows the number of work days for Georgians generated by the film incentive program each year. In FY2016, there were a total of 1,202,256 work days⁷. Translating that to full-time equivalent (FTE) jobs (working 261 days in a year), the program created 4,606 FTE jobs in FY2016.

FilmL.A. uses “credited job count” estimates to standardize its jobs analysis. While not a perfect method, the estimated job counts based on credited positions tends to be more conservative than many headcount estimates employed in different states.

As for the types of jobs a feature film supports, a breakdown of employment by key departments on films of different budget level is instructive. For *La La Land*, which had a \$30 million budget, there were 616 credited positions. The categories with the most credited positions on the film were for cast (which included dozens of dancers), set operations (composed of a wide variety of positions from production assistants to set medics and location managers) and the music department.

⁷ Georgia Governor’s Office of Planning and Budget, “Performance Measures Report”, Fiscal Year 2018, page 33. https://opb.georgia.gov/sites/opb.georgia.gov/files/related_files/site_page/FY%202018%20Performance%20Measure%20Report.pdf

SHARE OF JOBS IN KEY DEPARTMENTS

LA LA LAND

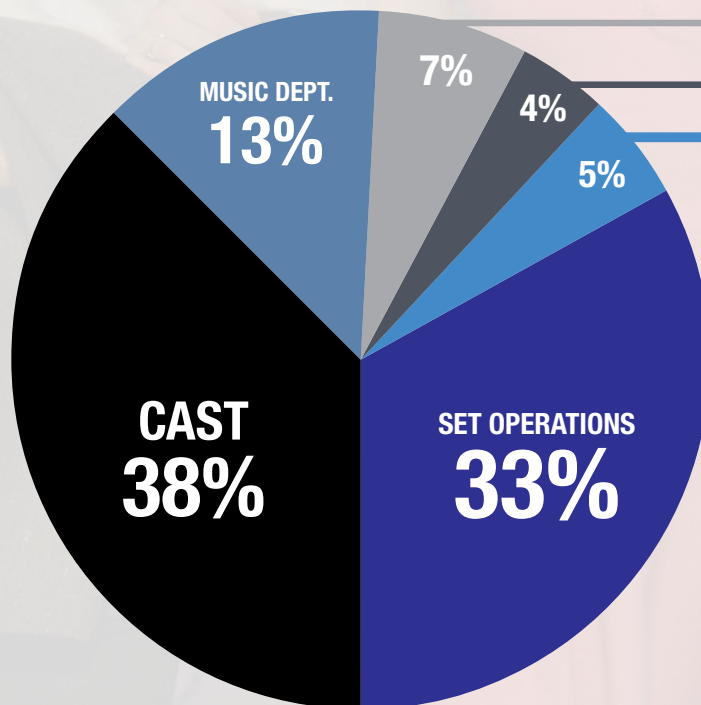


Photo: Dale Robinette / Lionsgate

For *Captain America: Civil War*, which had a \$250 million budget, there were 2,525 credited positions. Almost half of the credited positions the film were in VFX. The next largest categories were set operations and cast (which included dozens of stunt performers).

One of the key characteristics of movies produced in recent years with large budgets, typically over \$175 million, is that half or more of the credited positions are for jobs in VFX. More people were employed in VFX jobs on *Captain America: Civil War* than on the entirety of *La La Land* across all departments.

SHARE OF JOBS IN KEY DEPARTMENTS

CAPTAIN AMERICA: CIVIL WAR

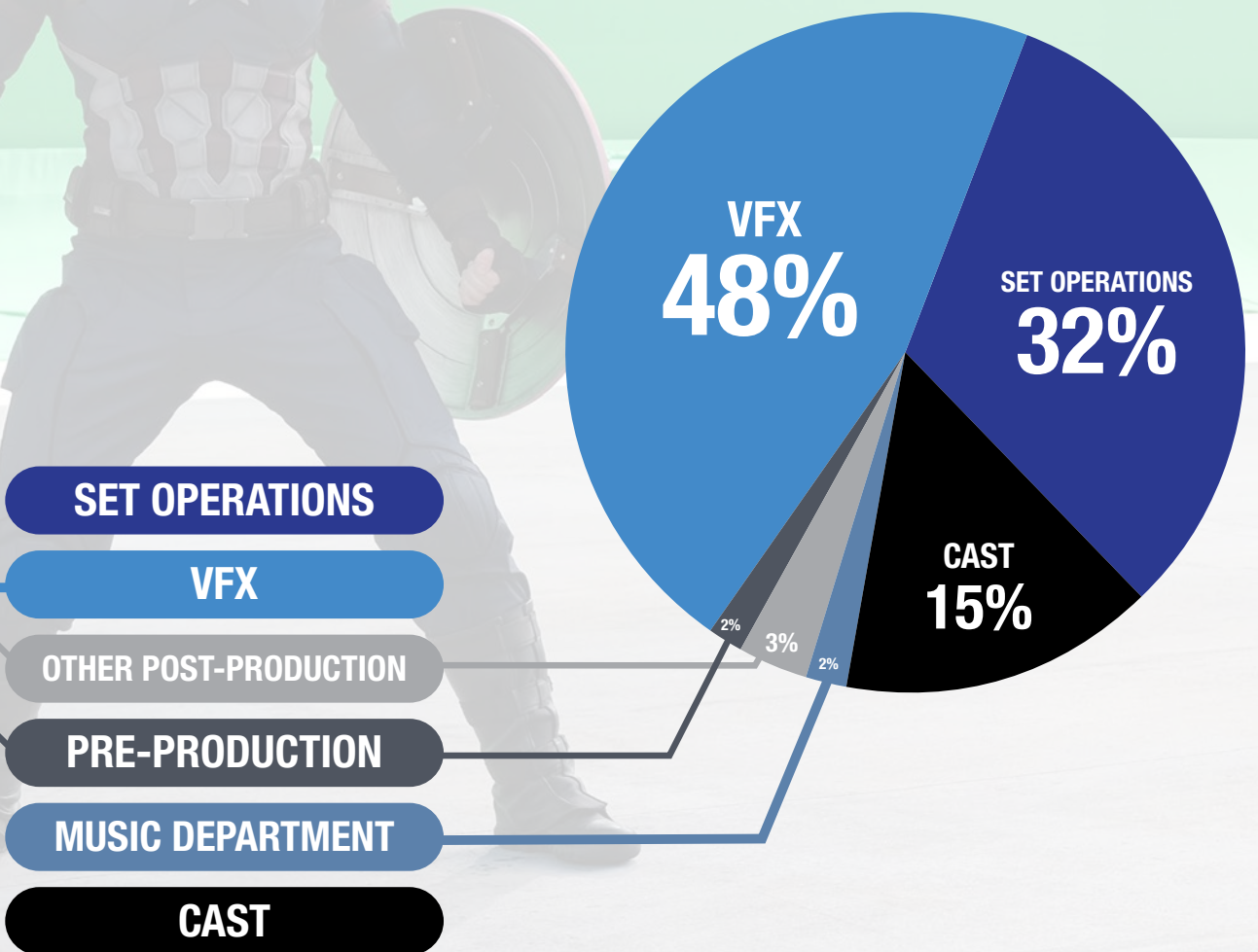


Photo: Zade Rosenthal / Marvel®

FILM PRODUCTION: VISUAL EFFECTS

The UK and Canada have both usurped California (and the United States) as global centers for VFX work. This is a concern for California because big budget features spend much of their production budgets on post and VFX. Of the 25 top live-action movies with budgets of \$75 million or more, almost half of the total jobs on many films go to VFX. On many films with budgets over \$150 million, over half of the jobs go to VFX.

In the leading Canadian provinces of British Columbia, Ontario and Quebec, separate incentives for VFX are offered to lure post-production work. These VFX incentives can be stacked with other provincial and federal film incentives, which makes them extremely lucrative.




For example, in British Columbia, once the stand-alone VFX credit is stacked with the regular provincial and federal film incentives, a total of 53 percent of the VFX spend can be subsidized. For a production spending \$1 million on VFX in British Columbia, the government will cover \$530,000 of the expenditure. Similarly, the UK altered its incentive in recent years to make it much easier for productions to send only VFX work there without the need to also do principal photography in the UK.

TABLE 8:
VFX LOCATIONS FOR TOP 25 \$100M+ LIVE ACTION FILMS IN 2016

| MOVIE | Budget (millions) | Primary VFX Location(s) | Secondary VFX Location(s) |
|---|-------------------|--|--|
| <i>Batman v Superman: Dawn of Justice</i> | \$300 | Vancouver (Scanline, MPC) | New Zealand (Weta), DNeg, Method |
| <i>Captain America: Civil War</i> | \$250 | California (ILM) | Germany (Rise FX) |
| <i>Rogue One: A Star Wars Story</i> | \$265 | ILM London/Vancouver/SF | California (Whiskeytree, Atomic Fiction) |
| <i>Star Trek Beyond</i> | \$185 | Vancouver (DNeg) | London, Mumbai |
| <i>Fantastic Beasts and Where To Find Them</i> | \$180 | Method Vancouver, MPC, Dneg, Framestore | image Engine (Vancouver) |
| <i>The Legend of Tarzan</i> | \$180 | UK (Framestore) | Australia (Rising Sun), |
| <i>X-Men: Apocalypse</i> | \$178 | Vancouver (Digital Domain) | Montreal (MPC), Australia (Rising Sun), |
| <i>Suicide Squad</i> | \$175 | Vancouver (Sony, MPC) | Montreal (MPC) |
| <i>The Jungle Book (2016)</i> | \$175 | UK (MPC) | London, Los Angeles (Previs & Postvis - MPC LA & London, Digital Domain); New Zealand (Weta) |
| <i>Alice Through the Looking Glass</i> | \$170 | Vancouver (Sony) UK, Vancouver (DNeg) | India (Airoli/Gener8) |
| <i>Independence Day: Resurgence</i> | \$165 | ILM London/Vancouver, Method Vancouver | Australia (Luma Pictures), Germany (Rise FX), UK (Framestore) |
| <i>Doctor Strange</i> | \$165 | Vancouver (Digital Domain, MPC, Scanline) | Germany (Trixter, Luxx, Mackevision) |
| <i>Warcraft</i> | \$160 | ILM SF/Singapore | Quebec (Hybride, Rodeo FX) China (BaseFX), India (Prime Focus) |
| <i>Deepwater Horizon</i> | \$157 | California (ILM) | Australia (Iloura) Quebec (Hybride) |
| <i>Ghostbusters (2016)</i> | \$144 | Sony , MPC Vancouver | Australia (Iloura), Los Angeles (Instinctual) |
| <i>The Divergent Series: Allegiant</i> | \$142 | Australia (Animal Logic), Quebec (RodeoFX) | Quebec (BUF), California (Luma) |
| <i>Gods of Egypt</i> | \$140 | Australia (Iloura) UK, Quebec (Cinesite) | Australia (Rising Sun), Quebec (Rodeo FX) |
| <i>The BFG</i> | \$140 | New Zealand (Weta) | |
| <i>Teenage Mutant Ninja Turtles: Out of the Shadows</i> | \$135 | ILM SF/London | China (Base FX), India (Prime Focus) |
| <i>Assassin's Creed</i> | \$125 | UK, Vancouver, India (DNeg) | Quebec (Cinesite) |
| <i>Jason Bourne</i> | \$120 | UK, Vancouver (DNeg) | |
| <i>The Huntsman: Winter's War</i> | \$115 | India (DNeg) | China (Pixomondo) |
| <i>Passengers (2016)</i> | \$110 | Vancouver (Scanline, MPC) | New Zealand (Weta), |
| <i>Ben-Hur (2016)</i> | \$110 | Vancouver (Scanline) Ontario (Mr X) | Ontario (Soho VFX) |
| <i>Miss Peregrine's Home for Peculiar Children</i> | \$110 | Vancouver/UK (DNeg) | Quebec (MPC, Rodeo FX) Vancouver / California (Scanline) |

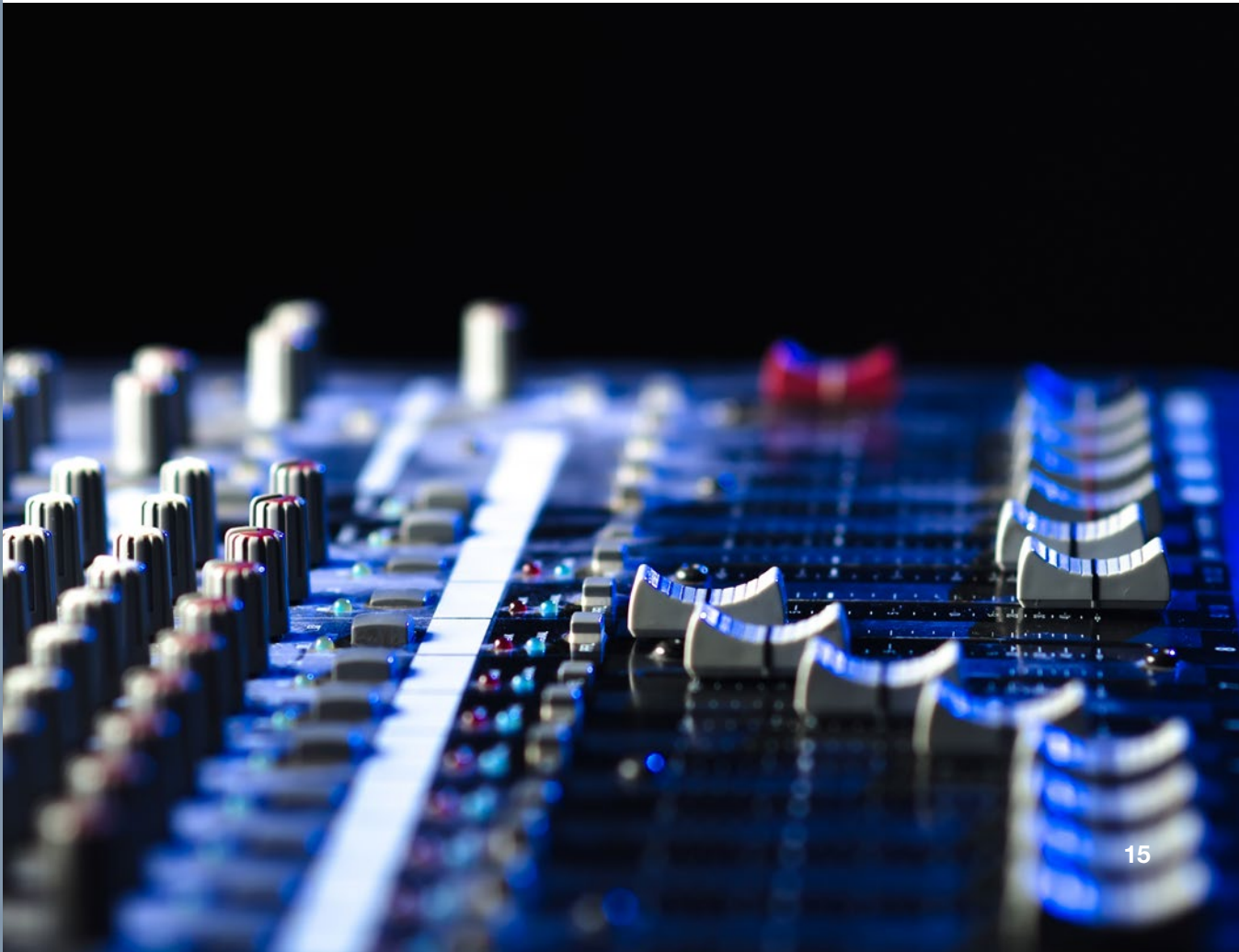
Based on a review of the 25 live-action films with the largest budgets over the last four years, the situation for the California VFX industry saw a temporary reprieve in 2015 followed by a substantial drop in 2016.

TABLE 9:
PROJECT COUNT FOR PRIMARY VFX WORK ON TOP 25 LIVE-ACTION FILMS, 2013-2016

| PRODUCTION CENTER | Primary VFX Location 2013 Movies | Primary VFX Location 2014 Movies | Primary VFX Location 2015 Movies | Primary VFX Location 2016 Movies |
|--|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| California  | 10 | 7 | 9 | 5 |
| Canada  | 7 | 10 | 14 | 17 |
| UK  | 7 | 11 | 15 | 9 |

FILM PRODUCTION: MUSIC SCORING

As for music scoring, California was the primary location for 35 of the 100 films in this year's study, a 35 percent share. This is the lowest showing for music scoring in California in the last four years. By comparison, California captured scoring work for 39 percent of the surveyed films in 2015, 41 percent in 2014 and 40 percent in 2013.



FILM INCENTIVE PROGRAMS

With the exception of New York and Louisiana⁸, all of California’s top five competitors offer substantial uncapped film incentive programs:

TABLE 10:
COMPARISON OF FILM INCENTIVE PROGRAMS IN TOP LOCATIONS

| LOCATION | FILM INCENTIVE |
|---------------------------|---|
| California | 20-25% on qualifying Below-the-Line costs on first \$100 million of qualified spend. Additional 5% uplift for music, visual effects and filming outside of the Los Angeles zone. Above-the-line costs are excluded. Annual cap of \$330 million. |
| Canada (Federal) | 16% of Canadian labor expenditures. Can be combined with Provincial incentives. |
| Canada (British Columbia) | 28% of qualifying British Columbia (BC) labor expenditures; Standalone incentive with Digital Animation or Visual Effects (DAVE) credit: 16% additional credit on qualifying DAVE labor. No annual cap. |
| Canada (Ontario) | 21.5% of qualifying Ontario expenditures (not limited to ON labor); Standalone incentive for Computer Animation and Special Effects: 20% of qualifying labor related to digital animation and special effects work. No annual cap. |
| Canada (Quebec) | 25% of qualifying Quebec (QC) expenditures (not limited to QC labor); Standalone incentive for Computer Animation and Special Effects: 20% additional credit on qualifying animation and special effects labor. No annual cap. |
| Georgia | 20% of the base investment in the state, plus 10% if the qualified production activities include a Georgia promotional logo in credits. ATL and BTL costs are covered. No annual cap. |
| Louisiana | 30% (45% maximum with bonus) on qualifying local spend for BTL and Above-the-Line (ATL) costs. Bonus: 10% for each individual LA resident (must have residency form and backup for each LA resident). Bonus: 15% of base investment for qualifying Louisiana screenplay Bonus: 15% of music expenditures for qualifying Louisiana music. Annual cap of \$180 million until 2018. |
| New York | 30% on qualifying local spend for Below-the-Line (BTL) costs. Extra 10% for shooting upstate. Above-the-Line costs are excluded from the incentive. Annual cap of \$420 million. Standalone incentive of 30% of qualified costs for postproduction work, with an annual program cap of \$25 million. |
| UK | 20-25% of all qualifying local UK spend. ATL and BTL costs are covered, as well as back-end profit participation payments. No annual cap. |

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 in California still places the state far ahead of its rivals. This is one of the reasons California was the only location that hosted multiple films in the top 100 that were primarily produced here without receiving a state incentive.⁹ Indeed, other than California and Florida (which hosted *Moonlight* without an incentive) none of the top competing locations outside the state hosted even a single surveyed film without offering a generous subsidy.

The impact of film incentives and their ability to influence location decisions for filmmakers is undeniable. Film incentive award amounts to individual productions¹⁰ were available for 37 of the movies in this study. In all, these 37 movies received at least \$595.8 million from various state/provincial and national governments.

Among the world’s top production centers, there is clearly a willingness to spend when it comes to attracting and/or retaining film & television production.

⁸ In 2015, Louisiana capped the amount of film tax credits that can be redeemed in a single year at \$180 million. Previously, the state’s incentive was uncapped.

⁹ Just three films received the California Film & Television Tax Credit.

¹⁰ See **Appendix A** for a complete list of the 36 productions and their respective incentive awards. The listed incentive amounts may not reflect the full amount of money received by the productions. Often, large budget films will receive five or more incentives from various jurisdictions. The amounts listed in the chart only represent confirmed incentive amounts.

TABLE 11:
FILM & TV PRODUCTION SPENDING & FILM INCENTIVE EXPENDITURES IN TOP PRODUCTION CENTERS

| LOCATION | TOTAL FILM & TV PRODUCTION SPENDING | COST OF INCENTIVE PROGRAM(S) |
|--------------------------|---|-------------------------------------|
| California | \$30+ billion annually ¹¹ | \$330 million ¹² (2017) |
| New York | \$5-\$6 billion annually ¹³ | \$420 million (2017) |
| UK | \$3.17 billion ¹⁴ (£2.34 billion) (2016) | \$427 million (£321 million) (2015) |
| Georgia | \$2.02 billion (2016) | \$606 million (2016) |
| British Columbia, Canada | \$1.9 billion ¹⁵ (CAD) (2016) | \$440 million (CAD) (2016) |
| Ontario, Canada | \$1.69 billion ¹⁶ (CAD) (2016) | \$292 million (CAD) (2016) |
| Louisiana | \$363 million ¹⁷ | \$282.6 million (2016) |

¹¹ According to the Bureau of Labor Statistics (BLS) film & television industry wages in California were \$18.4 billion in 2015 (most recent data available). In addition, according to the LAEDC, the film & television industry in California spends over \$15 billion each year in California on goods and services "from a wide variety of industries".

¹² Spending under the California Film & Television Tax Credit 2.0 Program was \$1.5 billion during its first year, when the initial cap was \$230 million. As the chart shows, the vast majority of production spending in California is not incentivized.

¹³ According to the most recent review of New York's film tax credit program, film & television productions receiving the incentive spent \$3.27 billion in the state in 2016: https://esd.ny.gov/sites/default/files/news-articles/2017_CamoinAssociates_FilmTaxCreditReport.pdf
 In addition, according to a 2012 report from HR&A Advisors, the amount of nonqualified production spending in (spending by productions that were ineligible for the state incentive) in New York was roughly \$2 billion annually:

<http://www.mpa.org/wp-content/uploads/2014/01/Economic-and-Fiscal-Impacts-of-the-New-York-State-Film-Production-Tax-Credit.pdf>

¹⁴ British Film Institute, "Film and other screen sectors production in the UK 2016":

<http://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-film-and-other-screen-sectors-production-in-the-uk-2016.pdf>

¹⁵ CreativeBC, "2015/16 Tax Credit Certification Activity":

http://www.creativebc.com/database/files/library/Tax_Credit_Certifications_2013_2016_Final.pdf

¹⁶ Ontario Media Development Corporation, "Production Statistics":

http://www.omdc.on.ca/collaboration/research_and_industry_information/production_statistics.htm

¹⁷ Loren C. Scott, "The Economic Impact of Louisiana's Entertainment Tax Credits" April 2017:

<https://louisianaentertainment.gov/docs/default-source/default-library/2017-entertainment-impact-study.pdf>



CONCLUSION

With the underlying economics of the U.S. motion picture industry unchanged since our previous report, a look at last year's top-performing films yields few surprises. Feature films — particularly the most expensive, effects-driven tent pole projects, continue to be made in areas where lucrative film production incentives exist.

The difference among these programs also plays a role. For example, spending on actors, directors, writers and other Above-the-Line (ATL) costs are not covered under California's film incentive, as they are in other top filming locations. Similarly, some top-performing jurisdictions now offer tailored credits for postproduction and visual effects. Creative considerations aside, film projects will locate where their budgets can be maximized.

So even California, which among all global competitors for these projects has the deepest infrastructure, talent, and a film incentive of its own, was equipped to capture only a fraction of the 100 feature projects included in this report. California's incentive has returned some feature projects to the state. In fact, in Los Angeles, on-location feature film production reached an eight-year high in 2016 — but the state's film incentive program seems optimized for use by a narrow band of feature film projects, with budgets from \$40 million to \$100 million.

While California finished fourth in overall project count in this year's study, the Golden State is still the world's top film & television production center. With over \$30 billion in direct spending annually, the volume of film & television production activity in California is more than New York, Georgia, Louisiana, the UK and Canada combined.



STUDY METHODOLOGY

Creation and approval of FilmL.A. Research reports is overseen by a Research Taskforce commissioned by the FilmL.A. Board of Directors, which includes executives from major studios, industry unions and guilds, staff from the California Film Commission, the Motion Picture Association of America, the Independent Film & television Alliance, and the Los Angeles Economic Development Corporation. The analysis and conclusions advanced in this study are wholly FilmL.A.'s and do not reflect the opinions or positions of individual board or review committee members or of their respective organizations.

CHANGE FROM PRIOR REPORTS

In comparison to past editions, FilmL.A. made some changes to its Feature Film Study research methodology for 2016. The most notable change involves the sample set for this study (and future installments), which is now based on the top 100 films at the domestic box office that were released within the studied year. The important qualifier is the date of release in domestic theaters, not when the film earned most of its revenue. Revenue earned for a film's entire theatrical run counts towards its ranking for the year it was released, regardless of when the revenue was generated.

Two considerations drove this change in project sampling. First, in previous years, FilmL.A. Research focused on films that were produced by the six major Hollywood studios in Southern California ("Majors", including Disney®, Warner Bros.™, NBCUniversal®, Paramount®, Sony® and 20th Century Fox™) and a selection of the best known independent studios ("Mini Majors"). In our 2015 report, these Mini Majors included Dreamworks®, Lionsgate® / Summit Entertainment, Weinstein Co.®, CBS® & Blumhouse Pictures®. However, in the first two feature film reports, the lineup of Mini Majors was slightly different, as it included Relativity Media® in place of Blumhouse Pictures.

Rather than make subjective decisions on which studios to include from year to year, FilmL.A. Research has opted to use the top 100 grossing films at the domestic box office, for a studio agnostic approach.

Second, due to the fluctuating number of films that each studio includes in its annual slate, the sample set under the old methodology did not yield the same number of films in any of the last three studies (2013: 108 films; 2014: 106 films; 2015: 109 films). While the sample sets from prior years were not radically different, they were not uniform. Using box office returns to establish a sample set removes any unintended implication that the total number of films surveyed each year is significant.

For historical comparisons, we re-analyzed the filming locations of the top 100 films at the domestic box office for the prior three years to determine location project counts (the number of movies) only.

Other comparisons (budget value, spending etc.) in this report and FilmL.A.'s prior three Feature Film Studies cautiously rely on data from each year's respective sample set.

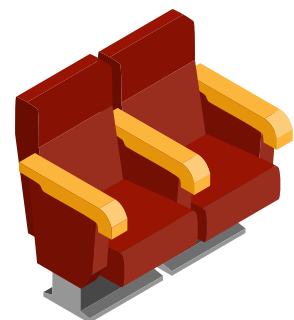
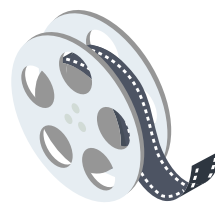
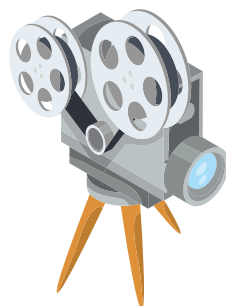
IDENTIFYING SOURCES

There are now several robust, credible and valuable online databases that offer employment information, budget estimates, shooting locations, studio involvement and box-office performance for major feature films.

In addition, various spending amounts, budget information and film incentive award amounts for several of the movies in this study are reported by credible media outlets and/or disclosed by filmmakers themselves.

When compiling information about surveyed films in this report, FilmL.A. initially relies on widely reported budget figures compiled in news reports and public sources like Box Office Mojo®. Often, these amounts are budget estimates, which tend to understate the actual cost of the production.

After the initial data is compiled, FilmL.A. adjusts the reported budgets for films where complete budget information is available from other sources, typically transparency reports from various state film offices and company filings in international locations like the UK and New Zealand.



SOURCES

ANNUAL FILM TAX CREDIT/TRANSPARENCY REPORTS:

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

ONLINE DATABASES:

Baseline Studio System
Box Office Mojo
Development Leads
IMDbPro
Variety Insight

OTHER:

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

MOVIES OF 2016 (APPENDIX A): LOCATION, SPENDING, AND INCENTIVE LIST

| NAME | Budget Est. (millions) | Shoot Start | Shoot Wrap | Primary Location | Secondary Location(s) | Location Spending (millions) | Incentive Amount (millions) | Scored in California |
|---|---------------------------|------------------------------|-----------------------------|---------------------|---|--------------------------------------|--------------------------------|-------------------------|
| <i>10 Cloverfield Lane</i> | \$13 | 10/20/2014 | 12/14/2014 | Louisiana | | \$6.80 | \$2.20 | ✓ |
| <i>13 Hours: The Secret Soldiers of Benghazi</i> | \$50 | 04/26/2015 | 07/12/2015 | Malta | Morocco | | | |
| <i>Alice Through the Looking Glass</i> | \$170 | 08/03/2014 | 11/07/2014 | UK | | \$133.4 (UK); \$36 (CN) \$15 (LA) | \$24 (UK) \$16 (CN) | |
| <i>Allied</i> | \$106 | 02/01/2016 | 06/03/2016 | UK | Canary Islands, Spain | \$106.00 | \$21.00 | |
| <i>Almost Christmas</i> | \$17 | 11/02/2015 | 12/2015 | Georgia | | \$16.00 | \$4.80 | ✓ |
| <i>Arrival</i> | \$47 | 06/07/2015 | 08/27/2015 | Canada, Quebec | | | | |
| <i>Assassin's Creed</i> | \$125 | 08/31/2015 | 01/04/2016 | UK | Spain, Malta | \$114.50 | \$17.29 | |
| <i>Bad Moms</i> | \$22 | 01/11/2016 | 03/01/2016 | Louisiana | | \$17.00 | \$5.50 | |
| <i>Barbershop: The Next Cut</i> | \$20 | 05/11/2015 | 06/29/2015 | Georgia | | | | |
| <i>Batman v Superman: Dawn of Justice</i> | \$300 | 05/21/2014 | 12/04/2014 | Michigan | | \$199.00 | \$37.00 | |
| <i>Ben-Hur</i> | \$110 | 02/02/2015 | 05/15/2015 | Italy | | | | |
| <i>Boo! A Madea Halloween</i> | \$20 | 01/04/2016 | 04/08/2016 | Georgia | | | | |
| <i>Bridget Jones Baby</i> | \$35 | 9/27/2015 | 12/15/2015 | UK | | | | |
| <i>Captain America: Civil War</i> | \$250 | 04/29/2015 | 08/21/2015 | Georgia | Germany | \$60.20 | GA: \$20 | |
| <i>Central Intelligence</i> | \$50 | 05/06/2015 | 07/30/2015 | Massachusetts | | | | |
| <i>Collateral Beauty</i> | \$36 | 02/22/2016 | 04/16/2016 | NY | | | | ✓ |
| <i>Deadpool</i> | \$58 | 03/23/2015 | 06/02/2015 | Canada, BC | | BC: \$40 | | |
| <i>Deepwater Horizon</i> | \$157 | 05/18/2015 | 08/20/2015 | Louisiana | | \$122.50 | \$37.70 | |
| <i>Dirty Grandpa</i> | \$25 | 01/12/2015 | 02/13/2015 | Georgia | Florida | | | |
| <i>Doctor Strange</i> | \$165 | 11/2015 | 04/04/2016 | UK | New York City, New York, USA, Hong Kong, Kathmandu, Nepal | \$137.00 | \$27.00 | |
| <i>Don't Breathe</i> | \$10 | 06/29/2015 | 08/2015 | Hungary | | | | |
| <i>Fantastic Beasts and Where to Find Them (Part One)</i> | \$180 | 08/17/2015 | 12/18/2015 | UK | | | | |
| <i>Fences</i> | \$24 | 04/22/2016 | 06/10/2016 | Pennsylvania | | | \$4.94 | ✓ |
| <i>Finding Dory</i> | \$200 | No Shoot Start Available. | No Shoot Wrap Available. | CA | | | | ✓ |
| <i>Florence Foster Jenkins</i> | \$29 | 05/11/2015 | 07/16/2015 | UK | | | | |
| <i>Ghostbusters</i> | \$144 | 06/17/2015 | 09/18/2015 | Massachusetts | New York, California | | | |
| <i>Gods of Egypt</i> | \$140 | 03/24/2014 | 07/11/2014 | Australia | | | | |
| <i>Hacksaw Ridge</i> | \$40 | 09/2015 | 12/2015 | Australia | | | | |
| <i>Hail, Caesar!</i> | \$22 | 11/10/2014 | 02/2015 | CA | | | | |
| <i>Hell or High Water</i> | \$12 | 05/26/2015 | 07/08/2015 | New Mexico | | | | |
| <i>Hidden Figures</i> | \$25 | 03/14/2016 | 05/13/2016 | Georgia | | | | ✓ |
| <i>How to Be Single</i> | \$38 | 04/20/2015 | 06/25/2015 | NY | | \$34.88 | \$11.35 | ✓ |
| <i>Ice Age: Collision Course</i> | \$105 | 2015 | 2016 | Connecticut | | | | ✓ |
| <i>Independence Day Resurgence</i> | \$165 | 05/04/2015 | 08/22/2015 | New Mexico | | NM: \$44 | \$11.00 | ✓ |
| <i>Inferno</i> | \$75 | 04/29/2015 | 07/05/2015 | Italy | Hungary | | | |
| <i>Jack Reacher: Never Go Back</i> | \$96 | 10/19/2015 | 02/2016 | Louisiana | | \$65.00 | \$21.00 | ✓ |

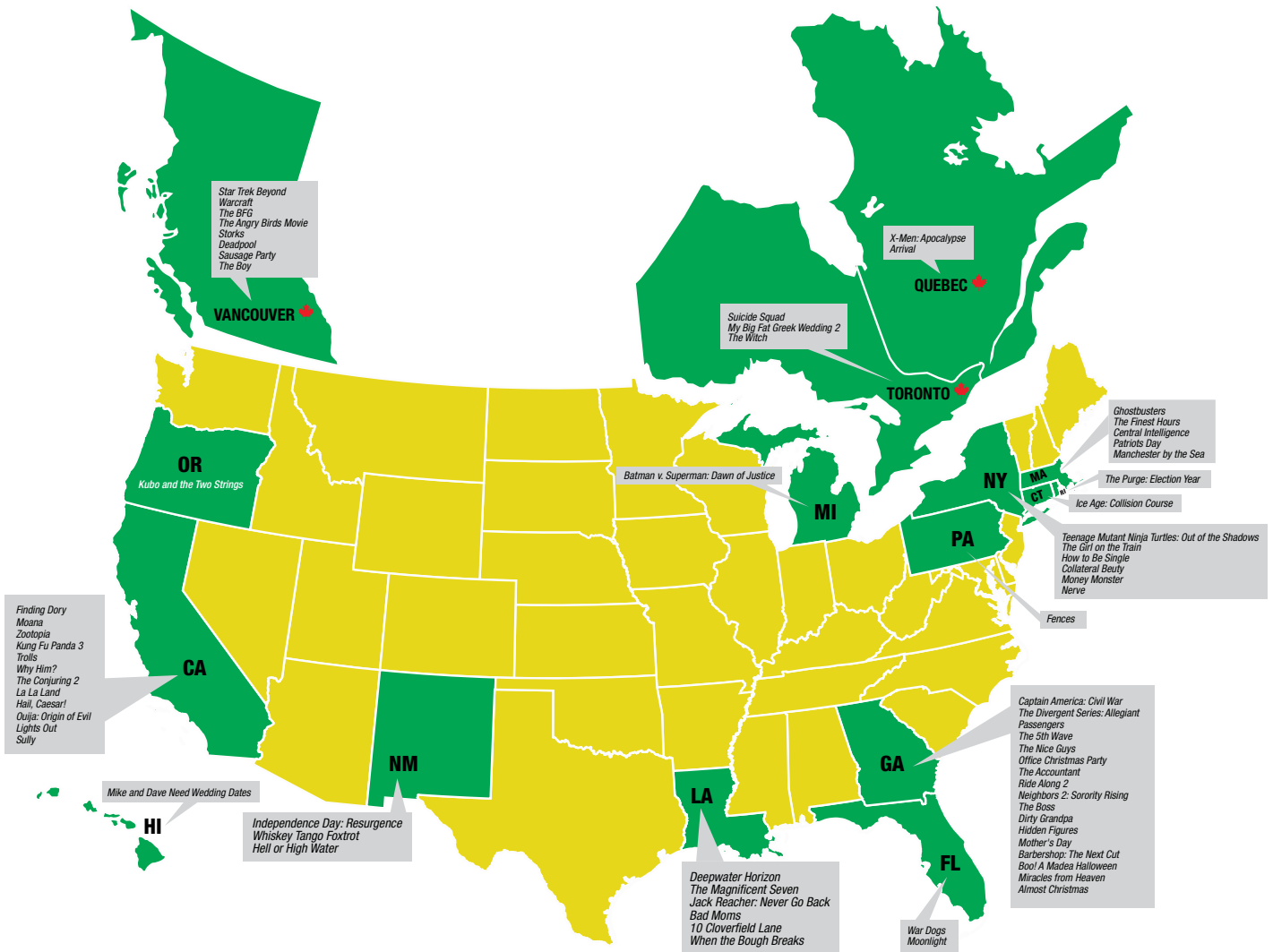
LOCATION, SPENDING, AND INCENTIVE LIST (CONTINUED)

| NAME | Budget Est. (millions) | Shoot Start | Shoot Wrap | Primary Location | Secondary Location(s) | Location Spending (millions) | Incentive Amount (millions) | Scored in California |
|---|------------------------|---------------------------|--------------------------|------------------|-----------------------------------|------------------------------|-----------------------------|----------------------|
| <i>Jason Bourne</i> | \$120 | 09/08/2015 | 02/22/2016 | UK | Greece, Nevada, Canary Islands | \$101.00 | \$11.80 | |
| <i>Kubo and the Two Strings</i> | \$60 | No Shoot Start Available. | No Shoot Wrap Available. | Oregon | | | | |
| <i>Kung Fu Panda 3</i> | \$145 | 2012 | No Shoot Wrap Available. | CA | | | | |
| <i>La La Land</i> | \$30 | 08/10/2015 | 10/2015 | CA | | | | ✓ |
| <i>Lights Out</i> | \$5 | 06/29/2015 | 08/05/2015 | CA | | | | ✓ |
| <i>Lion</i> | \$12 | 01/17/2015 | 05/09/2015 | Australia | | | | |
| <i>London Has Fallen</i> | \$60 | 11/05/2014 | 04/18/2015 | UK | | \$50.50 | \$5.80 | |
| <i>Manchester By The Sea</i> | \$9 | 03/23/2015 | 04/30/2015 | Massachusetts | | \$5.60 | \$1.40 | |
| <i>Me Before You</i> | \$25 | 04/09/2015 | 06/26/2015 | UK | | | | |
| <i>Mike and Dave Need Wedding Dates</i> | \$35 | 06/01/2015 | 08/2015 | Hawaii | | | | |
| <i>Miracles From Heaven</i> | \$19 | 07/13/2015 | 08/31/2015 | Georgia | | \$14.00 | \$4.20 | ✓ |
| <i>Miss Peregrine's Home For Peculiar Children</i> | \$110 | 02/22/2015 | 07/30/2015 | UK | Florida | | | |
| <i>Moana</i> | \$150 | 11/2015 | 06/2016 | CA | | | | ✓ |
| <i>Money Monster</i> | \$27 | 02/26/2015 | 05/03/2015 | NY | | | | ✓ |
| <i>Moonlight</i> | \$4 | 10/15/2015 | 11/16/2015 | Florida | | | | |
| <i>Mother's Day</i> | \$25 | 08/18/2015 | 10/07/2015 | Georgia | | | | |
| <i>My Big Fat Greek Wedding 2</i> | \$18 | 05/10/2015 | 06/27/2015 | Canada, Ontario | | | | |
| <i>Neighbors 2: Sorority Rising</i> | \$35 | 08/31/2015 | 10/28/2015 | Georgia | California | \$11.00 | \$3.30 | |
| <i>Nerve</i> | \$19 | 04/13/2015 | 06/15/2015 | NY | | | | |
| <i>Now You See Me 2</i> | \$90 | 12/01/2014 | 03/25/2015 | UK | China, New York | \$96.00 | UK: \$18.62 | |
| <i>Office Christmas Party</i> | \$45 | 03/29/2016 | 06/08/2016 | Georgia | | | | ✓ |
| <i>Ouija: Origin of Evil</i> | \$12 | 09/09/2015 | 10/23/2015 | CA | | \$11.70 | | |
| <i>Passengers</i> | \$150 | 09/28/2015 | 02/2016 | Georgia | Canada, California, Germany | | | ✓ |
| <i>Patriots Day</i> | \$45 | 03/29/2016 | 05/31/2016 | Massachusetts | | | | |
| <i>Pete's Dragon</i> | \$65 | 01/26/2015 | 05/01/2015 | New Zealand | | | | |
| <i>Ride Along 2</i> | \$40 | 07/07/2014 | 09/05/2014 | Georgia | Florida | | | |
| <i>Risen</i> | \$20 | 08/2014 | 11/2014 | Malta | | | | |
| <i>Rogue One: A Star Wars Story</i> | \$265 | 08/2015 | 02/2016 | UK | | \$265 | \$45.5 | ✓ |
| <i>Sausage Party</i> | \$19 | No Shoot Start Available. | No Shoot Wrap Available. | Canada, BC | | | | |
| <i>Sing</i> | \$75 | No Shoot Start Available. | No Shoot Wrap Available. | France | | | | ✓ |
| <i>Star Trek Beyond</i> | \$185 | 06/25/2015 | 10/15/2015 | Canada, BC | California, South Korea, UAE | BC: \$69 | | ✓ |
| <i>Storks</i> | \$70 | 09/2015 | 05/2016 | Canada, BC | | | | ✓ |
| <i>Suicide Squad</i> | \$175 | 04/13/2015 | 08/28/2015 | Canada, Ontario | California | Ontario: \$80 | | ✓ |
| <i>Sully</i> | \$60 | 09/28/2015 | 11/24/2015 | CA | New York, Georgia, North Carolina | GA: \$5.4 | GA: \$1.62 | ✓ |
| <i>Teenage Mutant Ninja Turtles: Out of the Shadows</i> | \$135 | 04/20/2015 | 08/2015 | NY | | \$80 | NY: \$29.3 | ✓ |
| <i>The 5th Wave</i> | \$54 | 10/18/2014 | 01/17/2015 | Georgia | | \$21.70 | \$6.60 | |

| NAME | Budget Est. (millions) | Shoot Start | Shoot Wrap | Primary Location | Secondary Location(s) | Location Spending (millions) | Incentive Amount (millions) | Scored in California |
|--|------------------------|-------------|--------------------------|------------------|-----------------------|------------------------------|-----------------------------|----------------------|
| <i>The Accountant</i> | \$44 | 01/19/2015 | 04/02/2015 | Georgia | | \$21.00 | \$7.00 | ✓ |
| <i>The Angry Birds Movie</i> | \$73 | 10/2014 | No Shoot Wrap Available. | Canada, BC | | | | |
| <i>The BFG</i> | \$140 | 03/23/2015 | 06/16/2015 | Canada, BC | | | | ✓ |
| <i>The Boss</i> | \$29 | 03/12/2015 | 05/15/2015 | Georgia | | | | |
| <i>The Boy</i> | \$10 | 03/11/2015 | 04/12/2015 | Canada, BC | | | | |
| <i>The Conjuring 2</i> | \$40 | 09/21/2015 | 12/01/2015 | CA | | \$35.60 | \$5.10 | ✓ |
| <i>The Divergent Series: Allegiant</i> | \$142 | 05/2015 | 08/22/2015 | Georgia | | \$99.00 | \$30.00 | |
| <i>The Finest Hours</i> | \$70 | 09/08/2014 | 12/18/2014 | Massachusetts | | | | |
| <i>The Forest</i> | \$10 | 05/15/2015 | 07/2015 | Japan | | | | |
| <i>The Girl on the Train</i> | \$45 | 11/04/2015 | 01/30/2016 | NY | | | | ✓ |
| <i>The Huntsman: Winter's War</i> | \$115 | 04/06/2015 | 07/23/2015 | UK | | \$115.36 | \$23.00 | |
| <i>The Jungle Book</i> | \$177 | 09/2014 | No Shoot Wrap Available. | UK | | \$177.30 | UK: \$23 | ✓ |
| <i>The Legend of Tarzan</i> | \$180 | 07/14/2014 | 10/03/2014 | UK | | | | |
| <i>The Magnificent Seven</i> | \$107 | 05/18/2015 | 09/18/2015 | Louisiana | New Mexico | \$96.40 | \$30.30 | ✓ |
| <i>The Nice Guys</i> | \$50 | 10/23/2014 | 02/07/2015 | Georgia | California | | | |
| <i>The Purge: Election Year</i> | \$10 | 09/16/2015 | 11/03/2015 | Rhode Island | Washington DC | | | |
| <i>The Secret Life of Pets</i> | \$75 | 2015 | 2016 | France | | | | ✓ |
| <i>The Shallows</i> | \$17 | 10/28/2015 | 01/15/2016 | Australia | | | | |
| <i>The Witch</i> | \$4 | 04/23/2014 | 05/28/2014 | Canada, Ontario | | | | |
| <i>Trolls</i> | \$125 | 2012 | 01/29/2016 | CA | | | | |
| <i>War Dogs</i> | \$50 | 02/25/2015 | 05/27/2015 | Florida | | | | |
| <i>Warcraft</i> | \$160 | 01/20/2014 | 05/23/2014 | Canada, BC | | | | |
| <i>When the Bough Breaks</i> | \$11 | 02/02/2015 | 03/20/2015 | Louisiana | | \$11.00 | \$3.40 | |
| <i>Whiskey Tango Foxtrot</i> | \$35 | 2/3/2015 | 4/10/2015 | New Mexico | | | | |
| <i>Why Him?</i> | \$52 | 02/09/2016 | 04/15/2016 | CA | | \$52.00 | \$5.50 | ✓ |
| <i>X-Men: Apocalypse</i> | \$178 | 04/27/2015 | 08/22/2015 | Canada, Quebec | | Quebec: \$105 | | ✓ |
| <i>Zoolander No. 2</i> | \$55 | 04/07/2015 | 07/2015 | Italy | | | | |
| <i>Zootopia</i> | \$150 | 2015 | 11/2015 | CA | | | | ✓ |

MOVIES OF 2016 (APPENDIX B): VISUAL MAP OF FILM LOCATIONS

NORTH AMERICA



MISC. INTERNATIONAL LOCATIONS



UK

Rogue One: A Star Wars Story
Fantastic Beasts and Where To Find Them
The Legend of Tarzan
The Jungle Book
Alice Through the Looking Glass
Doctor Strange
Assassin's Creed
Jason Bourne
The Huntsman: Winter's War
Miss Peregrine's Home for Peculiar Children

Allied
Now You See Me 2
London Has Fallen
Bridget Jones's Baby
Florence Foster Jenkins
Me Before You



AUSTRALIA

Gods of Egypt
Hacksaw Ridge
The Shallows
Lion

FRANCE

The Secret Life of Pets
Sing



HUNGARY

Don't Breathe

ITALY

Ben-Hur
Inferno
Zoolander 2



JAPAN

The Forest



MALTA

13 Hours: The Secret Soldiers of Benghazi
Risen



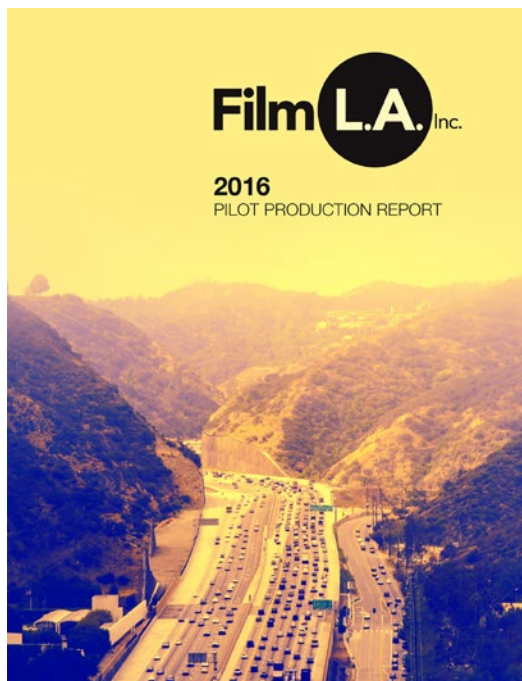
NEW ZEALAND

Pete's Dragon

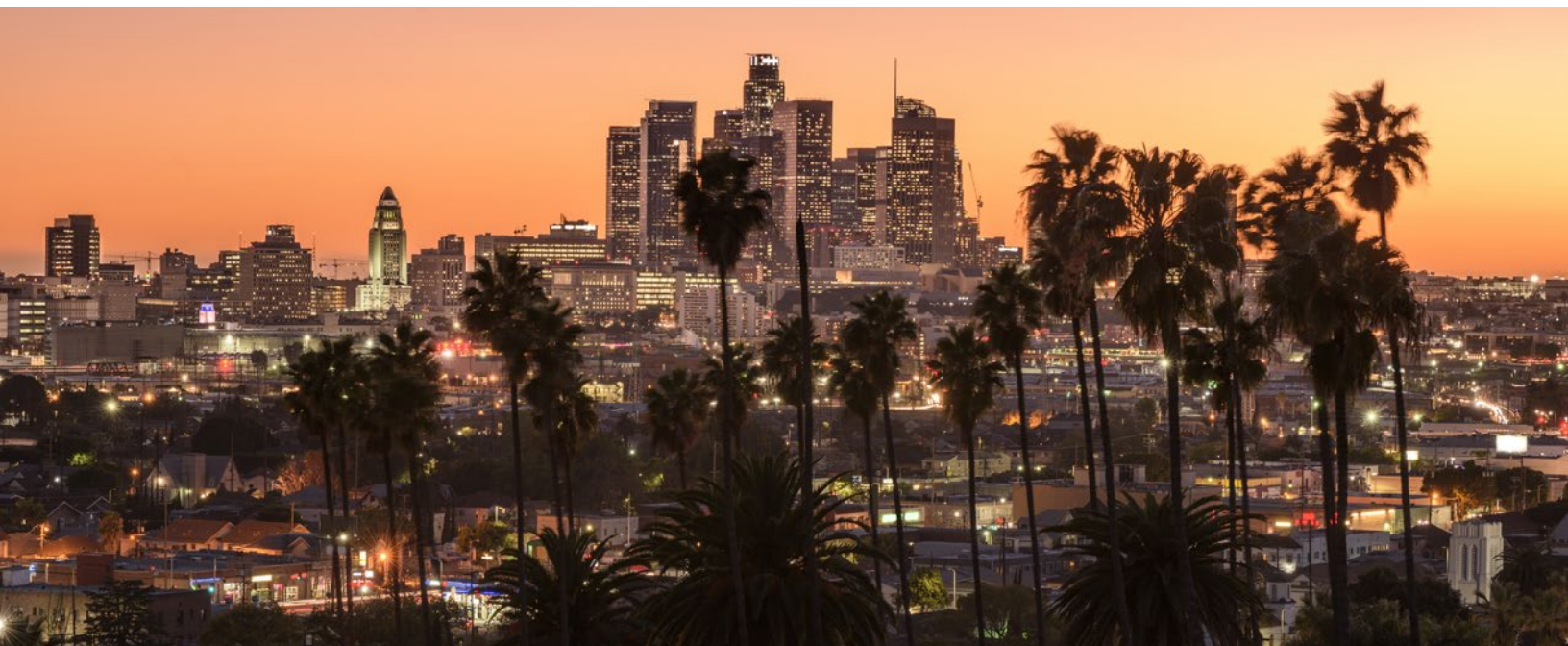
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2016 PILOT PRODUCTION REPORT



2015 FEATURE FILM STUDY





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