

# HPA

## 2025 | 30TH

TECH RETREAT

ANNIVERSARY

### **Navigating the New Normal: Production Trends and Industry Shifts in TV and Film**

**Alexander LoVerde, ProdPro**



**PRODUCTION ALERT!!!**  
**ISSUE # 761 - Friday, November 9, 2018**  
**Projects in Pre-Production**  
(Summary with Updates)

**BAD BOYS FOR LIFE aka BAD BOYS 3** – Sony Feature – Action Comedy

**Production Company** – Jerry Bruckheimer Films; **Prod Office Phone** – 404-900-7825

**Email** – [2018bbfl@gmail.com](mailto:2018bbfl@gmail.com) / [bb3resumes@gmail.com](mailto:bb3resumes@gmail.com)

**Producer(s)** – Jerry Bruckheimer Films - 1631 10<sup>th</sup> Street, Santa Monica, CA 90404

**Phone** – 310-664-6260 / **Fax** – 310-664-6260

**Executive Producer(s)** – Jerry Bruckheimer; **Directors** – Adil El Arbi, Bilal Fallah; **DP** – Benoit Debie;

**Production Designer** – Stijn Verhoeven;

**Cast** – Will Smith, Martin Lawrence

**Shooting Location** – Atlanta / Miami; **Start Date** – December 2018

**CITY ON A HILL** – Showtime Series for 2019 Premiere

**Producer(s)** – Pearl Street Films - 4000 Warner Blvd, Burbank, CA 91522

**Phone** – 310-566-0154 / **Email** – [assistant@pearlstreetfilms.com](mailto:assistant@pearlstreetfilms.com) >

**Executive Producer(s)** – Ben Affleck, Matt Damon, Jennifer Todd, James Mangold, Michael Cuesta, Kevin Bacon;

**Director** – Michael Cuesta (Pilot); **Costume Designer** – Sarah Edwards; **Line Producer** – Amy Herman;

**Cast** – Kevin Bacon, Aldis Hodge, Jonathan Tucker, Mark O'Brien, Jill Hennessey, Lauren E. Banks, Amanda Clayton, Kevin Chapman, Jere Shea, Kevin Dunn

**Shooting Location** – New York; **Start Date** – Late January 2019

**FEAR STREET** – Feature

**Production Company** – Chemin Entertainment; **Prod Office Phone** – 404-662-4059

**Email** – [fearstreetcrew@gmail.com](mailto:fearstreetcrew@gmail.com)

**Producer(s)** – Chemin Entertainment - 12180 Millennium Drive, Suite 500, Playa Vista, CA 90094

**Phone** – 310-633-2900 / **Fax** – 310-633-2907

**Executive Producer(s)** – Yvonne M. Bernard; **Producer(s)** – Peter Chernin; **Director** – Leigh Janiak;

**Shooting Location** – Atlanta / Los Angeles; **Start Date** – Early 2019

**GODZILLA VS. KONG** – Feature

**Production Company** – Legendary Entertainment; **Prod Office Phone** – 808-217-9281

**Email** – [apexproductionhi@gmail.com](mailto:apexproductionhi@gmail.com)

**Executive Producer(s)** – Roy Lee, Dan Lin, Kenji Okuhira; **Producer(s)** – Alex Garcia, Jon Jashni, Mary Parent, Brian Rogers, Thomas Tull; **Director** – Adam Wingard; **Production Designers** – Tom Hammock, Owen Paterson;

**Costume Designer** – Ann Foley; **Key Costumer** – Carrie Arakaki; **PC** – Julianna Politsky;



# About ProdPro



## Who uses ProdPro?

- Vendors & Suppliers
- Studios & Producers
- Crew & Agents
- Film commissions
- Unions

*Research cited by top media and trade publications*

The New York Times

AXIOS

THE  
Hollywood  
REPORTER

CNN

B B C

Los Angeles Times

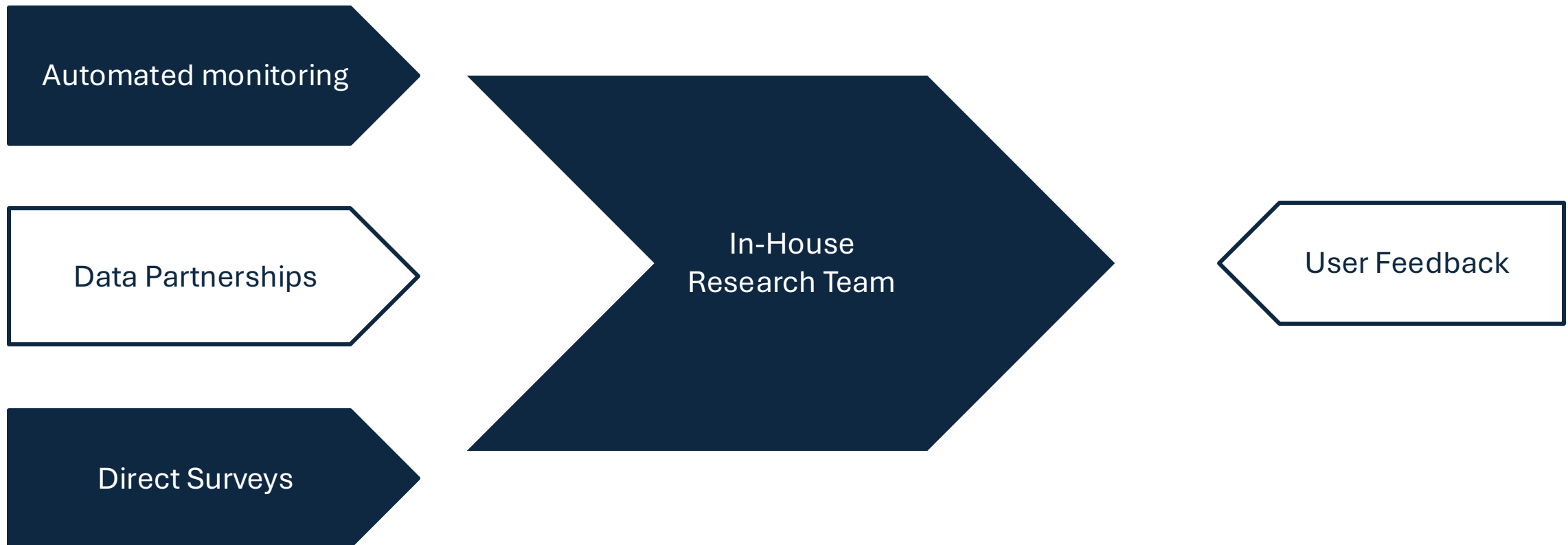
Bloomberg



# Research Coverage

- **Scripted, live-action TV Series and Features**
- **English language distribution channels**
- **Produced Globally**
- **Production schedule, estimated budgets, filming locations**
- **2021-Today**

# Methodology



# 2024 Deep Dive

# 2024: The year of the uneven recovery

**18%** ▲

# of production starts in 2024  
compared to prior year

**\$16.2B** ▲

committed production spend in  
2024 compared to prior year



# Visualizing the 2024 Recovery and “New Normal”

**Q1**



**Post-Strike Restart**



# Visualizing the 2024 Recovery and “New Normal”

**Q1**



**Post-Strike Restart**

**Q2**



**Risk of Work Stoppage**

# Visualizing the 2024 Recovery and “New Normal”

**Q1**



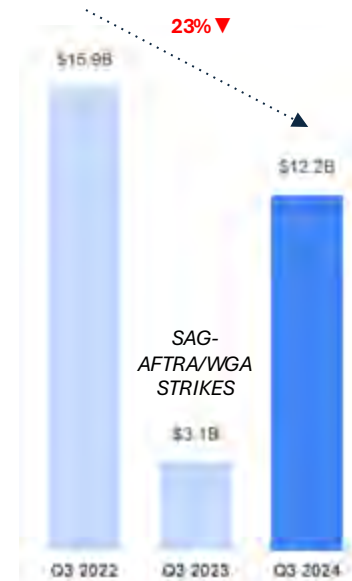
**Post-Strike Restart**

**Q2**



**Risk of Work Stoppage**

**Q3**



**“New Normal” Emerges**

# Visualizing the 2024 Recovery and “New Normal”

**Q1**



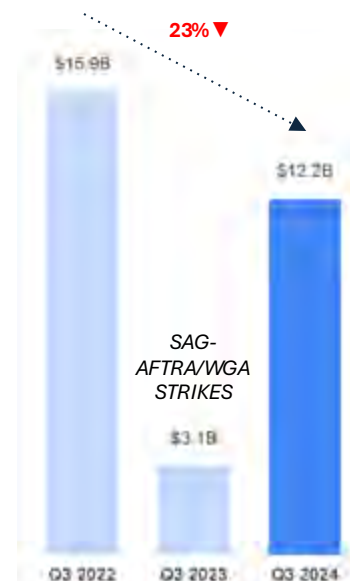
**Post-Strike Restart**

**Q2**



**Risk of Work Stoppage**

**Q3**



**“New Normal” Emerges**

**Q4**



**“Survive to 2025”?**



# TV vs. Features

# Feature Film: Relatively stable

# of Productions					
Year of Principal Photography Start					
	2022	2023	% YoY	2024	% YoY
Feature	706	600	15% ▼	679	13% ▲
Excludes pilots, TV movies, and productions with estimated budgets <\$1M.					

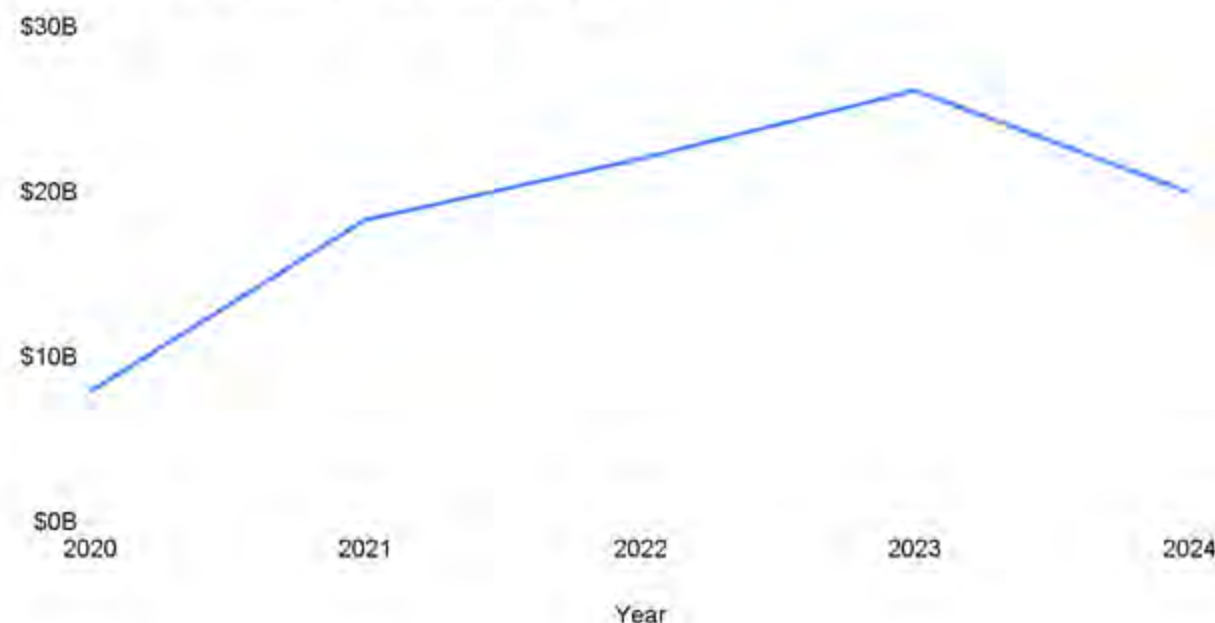
Committed Production Spend (\$USD)					
Year of Principal Photography Start					
	2022	2023	% YoY	2024	% YoY
Feature	\$12.2B	\$7.7B	37% ▼	\$12.9B	68% ▲
Excludes pilots, TV movies, and productions with estimated budgets <\$1M.					

# Feature Film: Relatively stable

# of Productions					
Year of Principal Photography Start					
	2022	2023	% YoY	2024	% YoY
Feature	706	600	15% ▼	679	13% ▲
Excludes pilots, TV movies, and productions with estimated budgets <\$1M.					

Committed Production Spend (\$USD)					
Year of Principal Photography Start					
	2022	2023	% YoY	2024	% YoY
Feature	\$12.2B	\$7.7B	37% ▼	\$12.9B	68% ▲
Excludes pilots, TV movies, and productions with estimated budgets <\$1M.					

Global Box Office (top 200 titles)



Source: Box Office Mojo

Box office relatively flat pre vs. post strikes



# TV Series: Market Correction

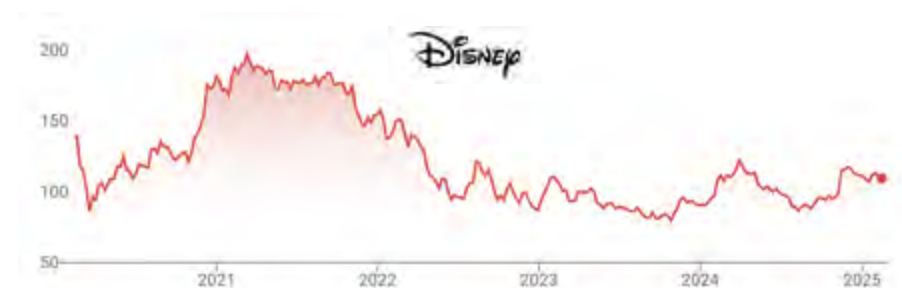
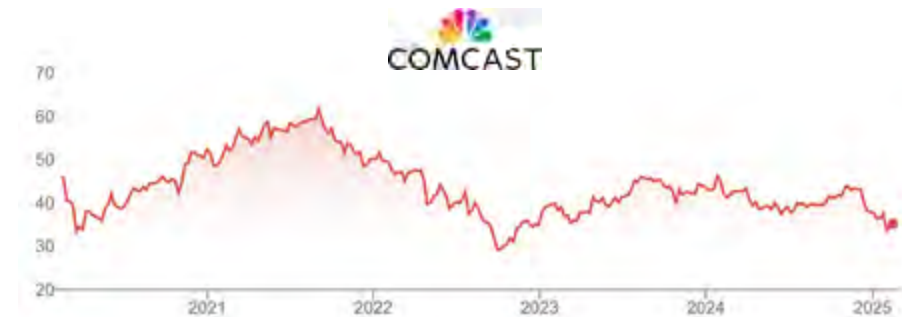
# of Productions					
Year of Principal Photography Start					
	2022	2023	% YoY	2024	% YoY
Series	607	397	35% ▼	494	24% ▲
Excludes pilots, TV movies, and productions with estimated budgets <\$1M.					

Committed Production Spend (\$USD)					
Year of Principal Photography Start					
	2022	2023	% YoY	2024	% YoY
Series	\$35.7B	\$18.1B	49% ▼	\$29.1B	61% ▲
Excludes pilots, TV movies, and productions with estimated budgets <\$1M.					

# TV Series: Market Correction

# of Productions					
Year of Principal Photography Start					
	2022	2023	% YoY	2024	% YoY
Series	607	397	35% ▼	494	24% ▲
Excludes pilots, TV movies, and productions with estimated budgets <\$1M.					

Committed Production Spend (\$USD)					
Year of Principal Photography Start					
	2022	2023	% YoY	2024	% YoY
Series	\$35.7B	\$18.1B	49% ▼	\$29.1B	61% ▲
Excludes pilots, TV movies, and productions with estimated budgets <\$1M.					

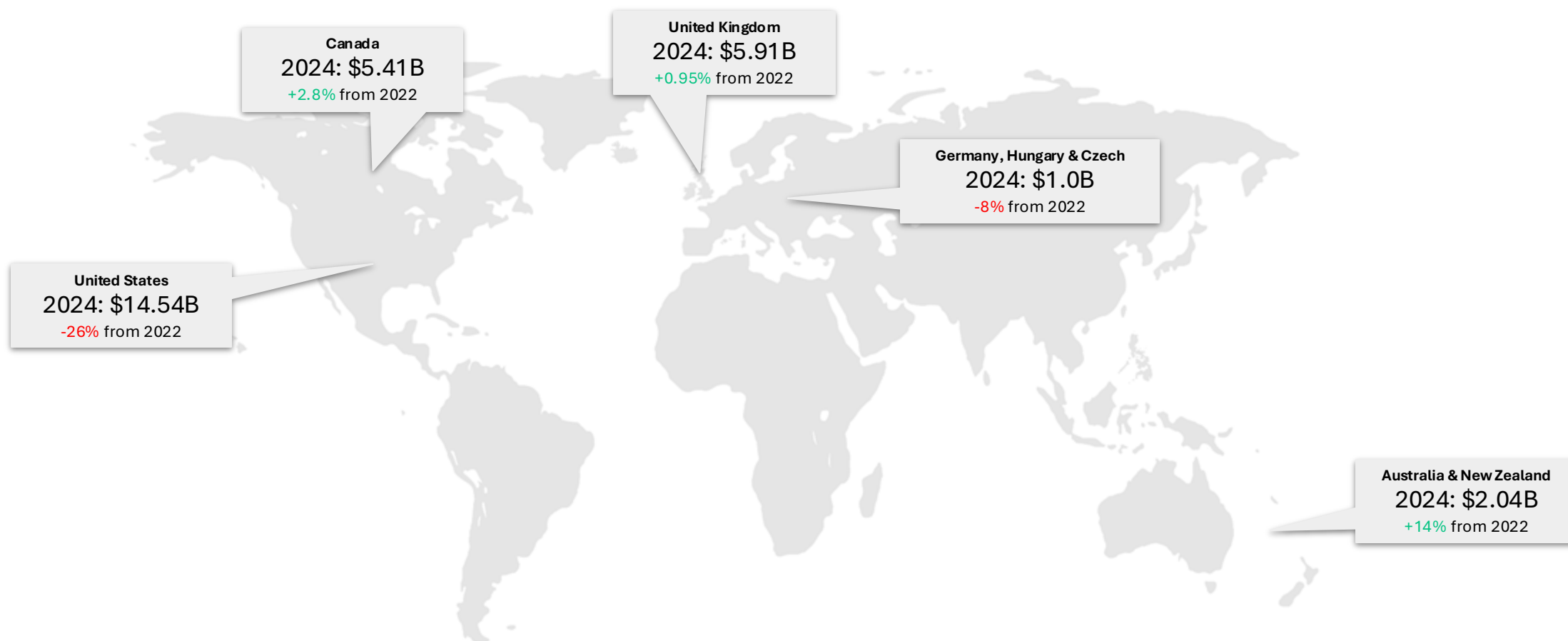


# Geographic Shifts



# Top Filming Hubs by Production Spend

(Includes projects with \$40M+ budgets)



# Outlook Perspectives

# ProdPro Survey Results

Below-the-line Crew

**+500**

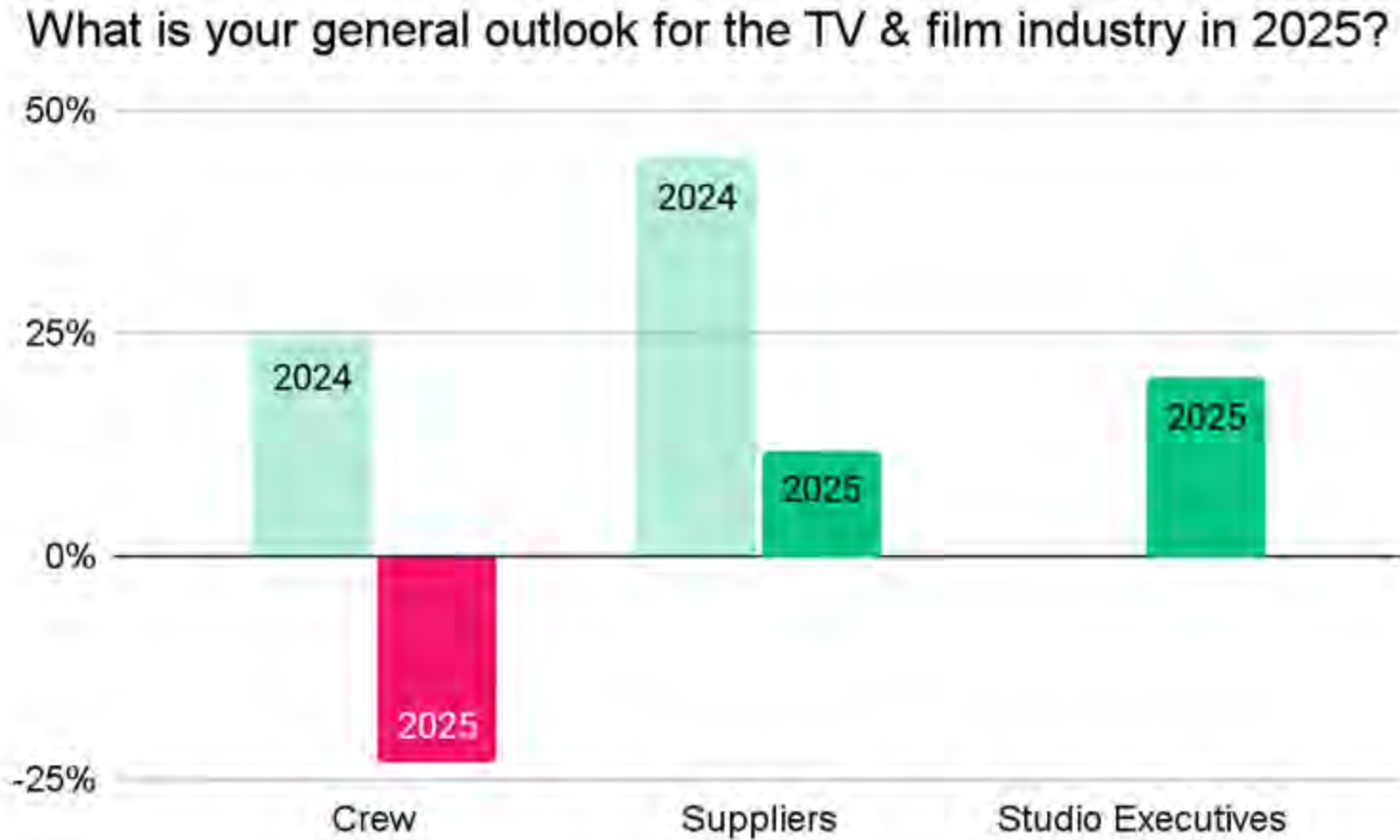
*Production, Costumes, Makeup, Camera,  
Props, Art, VFX, Post, Sound, Music, Stunts,  
Accounting*

Studio & Supplier Execs

**+150**

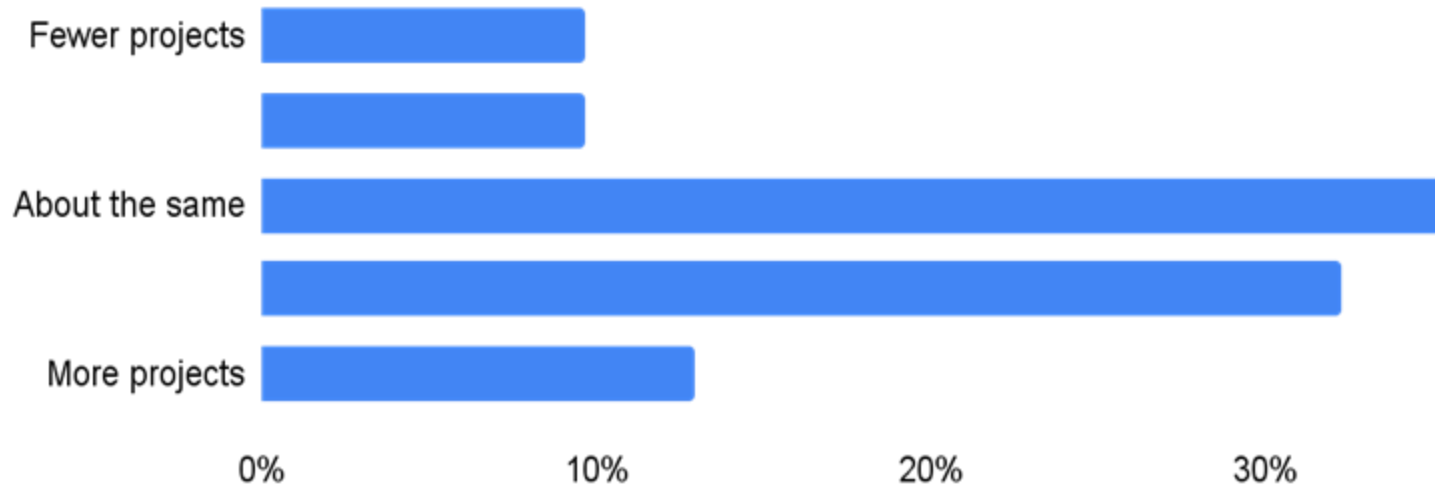
*Physical Production, Post Production,  
Production Finance, CEO, Owners, COO,  
CFO, Sales, Marketing, Finance*





# Expectations for 2025 production volume

How does your production slate for 2025 compare to 2024?



**49%** of suppliers forecast  
their revenues increasing

# Expectations for 2025 production spend

## Top 10 cost-controlling measures considered by studio execs

- |                      |                                    |
|----------------------|------------------------------------|
| 1. Tax incentives    | 6. Fewer episodes                  |
| 2. Hiring local crew | 7. Lower negotiated supplier rates |
| 3. Shorter schedules | 8. Reduced crew size               |
| 4. Digital workflows | 9. Virtual production              |
| 5. Co-productions    | 10. Remote production techniques   |

**93%**

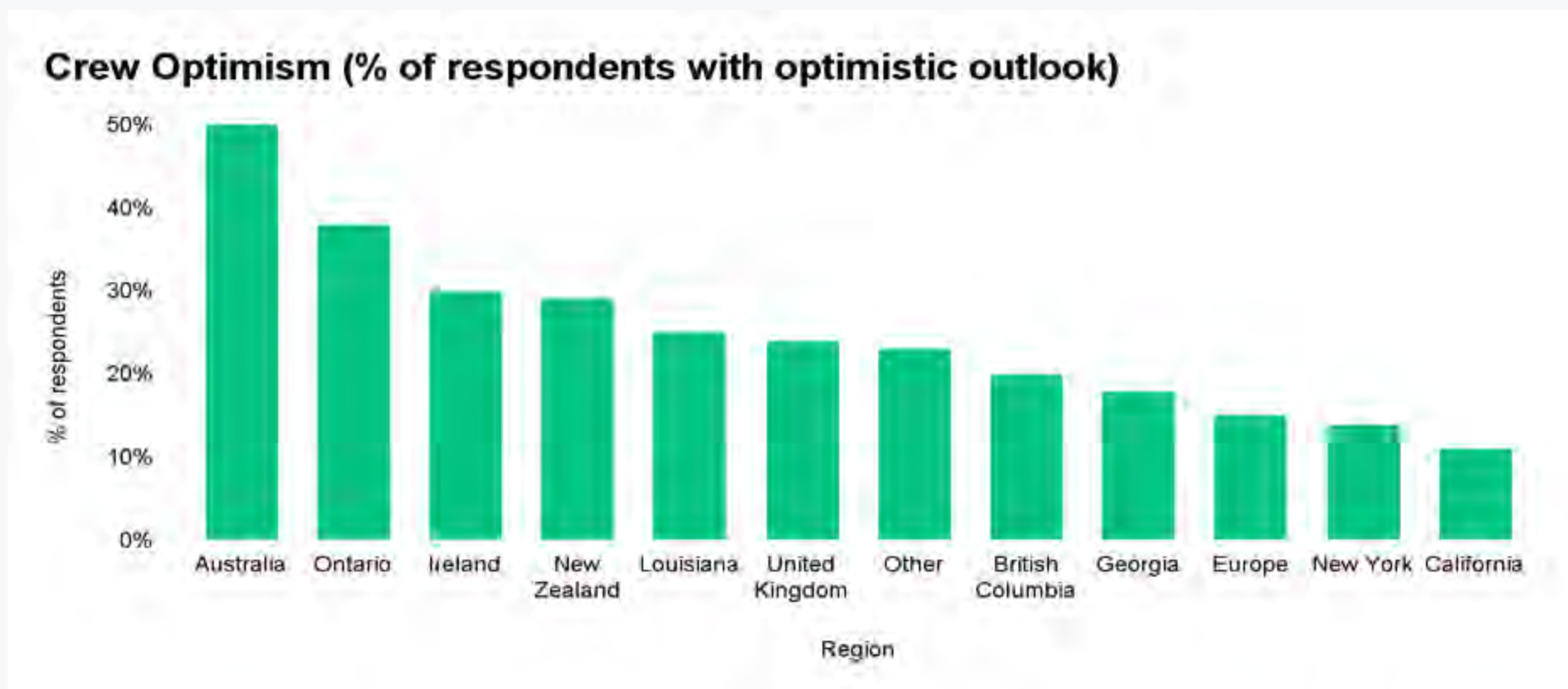
of studio execs placed tax incentives  
as a top 3 cost control measure

# Preferred locations for 2025-26 revealed

- |                          |                         |
|--------------------------|-------------------------|
| <b>1. Toronto</b>        | <b>6. California</b>    |
| <b>2. United Kingdom</b> | <b>7. Georgia</b>       |
| <b>3. Vancouver</b>      | <b>8. New Jersey</b>    |
| <b>4. Central Europe</b> | <b>9. New York</b>      |
| <b>5. Australia</b>      | <b>10. South Africa</b> |



# Crew optimism by geography



### **Top 5 uses of AI, provided by studios:**

- **Post-production optimization**
- **Voice Cloning and ADR**
- **Pre-Visualization**
- **Script Analysis and Audience Prediction**
- **Budgeting and Financial Planning**

**Let's connect!**



**HPA**

**2025 | 30TH**

**TECH RETREAT | ANNIVERSARY**