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Changing UK content investment: what could this mean for the health of the production sector?

A report for Pact
prepared by Oliver & Ohlbaum Associates Ltd



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Summary

This is a critical moment for the UK's TV production sector and the UK's audiovisual (AV) ecosystem more broadly.

Our production sector is a global success. The sector's entrepreneurialism has delivered growth, serving UK commissioners, attracting international investment and driving exports of British content around the world. This has brought economic, social and cultural benefits across the Nations and Regions.

Public Service Broadcasters (PSB) in particular draw on the UK's production sector in delivering their remits to provide high quality, creative content that reflects the diversity of life across the UK. Meanwhile, multichannel broadcasters, SVOD services and inward investors turn to UK producers for some standout original content that attracts and retains audiences, here and abroad.

However, we are seeing a prolonged slowdown in commissioning investment and a change in the mix of programmes being commissioned, particularly affecting small and medium-sized producers, including producers in the Nations & Regions. Creative clusters like Cardiff and Glasgow have developed through a foundation of PSB commissioning that provides stable revenues and IP to support growth and enable diversification through inward investment.

Our report is intended to start a conversation about what the UK wants for its production sector and those who work in it – where is the sector heading in the next five years and are we content with this direction? It comes in the context of three important policy moments over the next two years: the Ofcom PSB Review, the Future of TV Distribution work and the upcoming BBC Charter review – we must consider what this next phase in AV sector's development looks like so that the ecosystem can thrive in an all-IP world.

The success of the UK TV production sector relies on a cycle of creative renewal

The health of the production sector is underpinned by a cycle of creative renewal, enabled by low barriers to entry. This means that creative talent is incentivised to build and develop businesses before selling to larger rivals, spinning out, and starting the process again. This cycle is how established producers and in-house studios gain access to fresh ideas and talent and can diversify and grow. It attracts third party funding to the sector. It means that commissioners benefit from innovative ideas and audiences benefit from new stories from across the UK. An attractive domestic UK production sector also attracts and anchors inward investment – which otherwise would move around as more countries compete in terms of fiscal incentives and studio space.

The cycle of renewal has worked extremely well over the last two decades, supported by a balanced PSB regulatory framework, with total independent TV production sector revenues standing at £3.6 billion in 2023.¹ Vitality, the cycle relies on there being a balanced mix of different types of production companies in the sector – by genre, size, location and ownership. In contrast, other major European countries have production sectors with a comparatively high share of small production companies that struggle to grow (the 'long tail').²

Commissioning has been challenged in recent years

In the UK, PSB account for the majority of investment in UK original content in terms of number of commissions.³ Their commissioning is essential to the health and sustainability of the production sector and its cycle of creative

¹ Oliver & Ohlbaum Associates for Pact, 'UK Television Production Survey: Financial Census 2024'

² Eurostat and Oliver & Ohlbaum analysis, average number of persons employed and average turnover by motion picture, video and television programme production enterprises

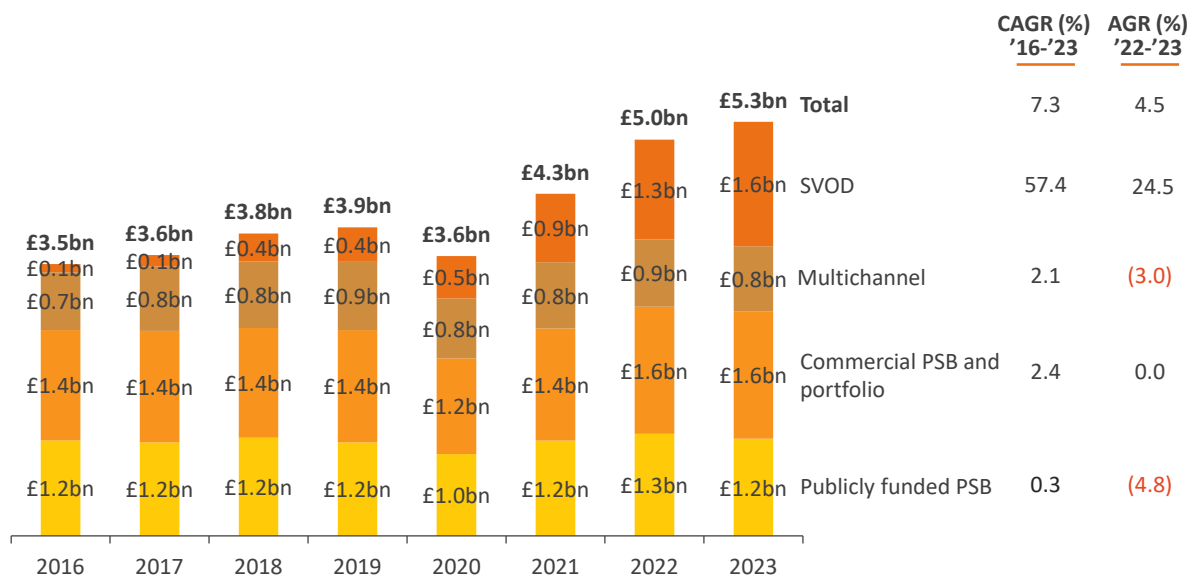
³ Ofcom, 'Understanding the UK's TV Production Sector', August 2023, produced by Oliver & Ohlbaum Associates – PSB main channel commissions accounted for 86% of titles commissioned in the UK in 2021. This relates to BBC One, BBC Two, ITV, Channel 4 and Channel 5.

renewal. PSB invest across a depth and breadth of genres, budgets, locations and types of producer. In turn, a strong UK production sector enables PSB to deliver on their remits to provide high quality content that reflects different stories, viewpoints and concerns from across the UK.

However, PSB and other commissioners are facing structural challenges. In particular, viewing to linear television continues to gradually decline in favour of VOD services as well as video sharing platforms like YouTube and TikTok and gaming. The rise of online platforms has impacted advertising models. Public funding has declined in real terms. There is strong competition between global SVOD services. There has also been turbulence in recent years: following the pandemic, the bounce back in commissioning in 2021 was followed by retrenchment as inflation in the sector and wider economy led to falling advertising and subscription revenues; the US writers and performers strike put pressure on inward investment.

These developments can be seen in the chart below, which contrasts the overall rate of growth in content investment across 2016-2023 with the last full year of 2022-2023.

UK content investment by service type on original programming, 2016-2023, £bn



Note: Excludes films with theatrical releases. Some year-on-year change in multichannel spend, e.g. from 2022 to 2023, likely driven by broadcasters moving commissioning on their linear multichannels to their on-demand SVOD services. Publicly funded PSB includes only BBC and BBC PSB portfolio channels, such as regional and children's channels.

Source: Ampere Analysis, Oliver & Ohlbaum estimates and analysis

To respond to revenue pressures and changing audience behaviour, PSB are changing their commissioning strategies to focus on 'fewer, bigger, better' productions that can cut through and drive viewing on their VOD services. In addition, the rate of growth in SVOD commissioning investment has moderated and moved towards the core genres of high-end Drama and Factual, and some Entertainment amid a new focus on profitability.

To examine the impact of a changing commissioning mix, we looked at the extent to which each genre supports a variety of production company types

To test the impact of a changing commissioning mix by the main commissioners by volume, we developed indicators to capture the variety of production company types that were supported by PSB main channel commissioning⁴ by genre and day part in 2016-2023, e.g. Nations & Regions independents, size (turnover), new or existing companies, and independents with diverse leadership. We also carried out a survey and interview programme among producers to gather insights into their company's experiences to date.

We found that investment is moving away from genres and budget ranges that provide opportunities for producers to develop their businesses and grow

Overall, PSB investment is moving investment into higher budget genres and day parts, especially high-end Drama and Factual, as well as peak-time Entertainment. This means moving investment out of Factual genres and programmes traditionally broadcast in daytime such as daytime Entertainment.

However, Specialist Factual, 'other' Factual as Arts and Classical Music and off-peak Entertainment support a high to moderate variety of production companies. On the other hand, high-end Drama is more likely to be made by experienced production companies.

This is a relevant development for the overall health of the UK AV sector because Factual programmes and off-peak commissions provide long-running, returning series and therefore a stable revenue stream for mid-sized producers, enabling them to reinvest and grow. PSB also provide opportunities for newer and smaller producers that may require more support initially. The producers active in these genres and budget levels may be based across the Nations & Regions or have owners from diverse groups that are underrepresented in the screen industry, such as those from working class backgrounds or who are racially or ethnically diverse.

'Without the mid-range companies, how do you build capacity in the Nations and Regions?' – Female-led Factual producer from Scotland

SVOD commissioners also make sizeable investments in the UK. However, this commissioning is distinctive and complementary to PSB commissioning. It focuses on very high-end Drama, with some high-end Factual. This means that while the total spend is high, there are fewer individual productions – there were 30 SVOD commissions in the UK in 2023, compared to 1,391 from the main PSB channels.⁵ In line with their business models, SVOD commissions are in a relatively narrow range of genres and, linked to the high budgets, the producers engaged are more likely to be well-established and experienced.

Production companies across the Nations and Regions are affected

TV and film clusters across the UK are delivering growth, bringing significant economic and social benefits to their Nations and Regions, including highly skilled jobs.⁶

The ecosystem is complex and finely balanced, and future growth and sustainability are not guaranteed. While commissioning in the Nations & Regions has increased since 2016, there has been a changing commissioning mix. In the English Regions, spend has grown faster than hours from 2016, suggesting a move towards high-end and peak time programming. While high-end Drama commissioning has increased in the Nations, as well as Entertainment in

⁴ The five main PSB channels are BBC One, BBC Two, ITV, Channel 4, Channel 5

⁵ PSB includes the main PSB channels BBC One, BBC Two, ITV, Channel 4 and Channel 5. SVOD includes Netflix, Prime Video, Apple TV+ and Disney+. O&O Producer database, Ampere Analysis.

⁶ 'Screen sector clusters: securing sustainability and growth' A report for COBA and Pact prepared by Oliver & Ohlbaum Associates, 2025

Scotland, there has been a decline in the number of unscripted off-peak commissions and pressure on these budgets. This overall growth, diversification and inward investment is welcome. However, maintaining a mixed ecology is important – as mentioned, lower budget, returning strands provide financial stability, allowing production companies to enter, build a reputation, reinvest and grow. This is especially relevant in places that are seeking to create and grow an audiovisual cluster.

Polarisation seems to be emerging between the largest and the very smallest producers and programme budgets

‘What we’re looking at is a very severe kind of dissection between two types of programming and budgets ... most broadcasters seem to be going for high end [or] high-volume low budget... The middle seems to be going from television’ – Diverse-led indie from the English Regions

In terms of the size of producer being commissioned, we found a potential polarisation. Data indicates that the number of commissions by the five main PSB channels may be moving towards the largest producers (over £70 million/ year revenues) and the very smallest with under £1 million/ year revenues.

In addition, fewer production companies are being commissioned to produce for the first time for the five main PSB channels, with the share of new producers declining from 35 per cent in 2016 to 17 per cent in 2023. This may reduce the opportunities for new talent and new voices to enter the sector, gain their first break and build experience.

In line with this, most of our survey respondents – 91 per cent – agreed that financial pressures on commissioners will lead them to favour larger production companies as they seek to reduce risk. This rose to 100 per cent among unscripted and working-class led producers.

Only 20 per cent of our survey respondents said that they felt confident about the prospects of their business, falling to 7 per cent in the Nations

As we have discussed, a varied balance of producer types is critical for the cycle of creative renewal that underpins the health of the sector and the availability of innovative and diverse content – if ‘the middle goes’ from television, this cycle could come under pressure.

This may also put pressure on progress in increasing the diversity of off-screen talent and crew

The diversity of off-screen talent and crew is vital to dynamism and innovation in the sector, while ensuring that programming reflects audiences across the UK. Existing industry initiatives have made progress in supporting off-screen talent and crew diversity, but it is important that this work can continue and that progress to date is not lost.

We analysed the latest Diamond report, which provides detailed breakdowns of off-screen representation by diverse groups by genre. We looked at the categories of Black, Asian and Minority Ethnic; Disabled; Women. This has allowed us to assess at a high level the extent to which different genres support these types of off-screen diversity, relatively speaking, and to consider how the diversity of the overall pool of off-screen talent and crew might be affected by the change in commissioning.

70 per cent of producers surveyed agreed that lower spend and the change in the mix of genres being commissioned is putting at risk recent progress in the diversity of production talent and crew

The declines in off-peak commissioning in Entertainment and the move towards higher volume, lower cost strands in daytime Factual Entertainment, are likely to affect genres that have provided opportunities to off-screen talent and crew from underrepresented groups. In particular, these genres employ a large crew over time. This is significant as it is often on returning and high volume series that under represented talent are able to develop their careers through opportunities and support such as upskilling, stepping up into senior roles and shadowing. This is due to factors such as the higher volume of content being produced and the unscripted space generally having faster turnaround between projects, leading to more frequent hiring opportunities.

While Drama supports relatively high levels of diversity, this is across continuing Drama and high-end Drama; the former tends to provide higher levels of representation but investment is moving towards the latter.

These rankings are relative; all genres have some more progress to make in the inclusion of racially and ethnically diverse and disabled people compared to census levels for the population. They do not take account of seniority of role – overall, diverse groups are less represented in senior positions; women are less represented in technical and craft roles and directing. We must also note the question of intersectionality, as the same individual may be part of different groups.

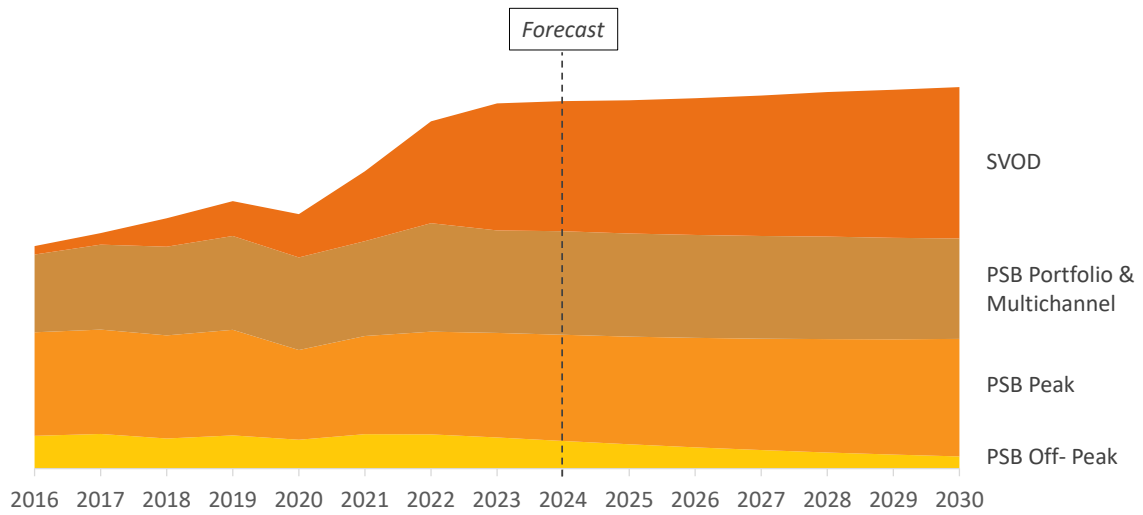
Our illustrative forecast of content investment shows that if recent trends continued, the balance of the production sector would be at risk

Next, we considered what commissioning might look like in the future, if the current slowdown and change in genre mix continued. This might be seen as an extreme example, but it is designed to illustrate the direction of travel and bring the potential implications into focus.

The genres with falling investment support the widest variety of production companies

In our illustrative forecast, total spending for the five main PSB channels would gradually decline, with share of spend lost from PSB off-peak to enable an increase in peak time. Multichannel spend would remain relatively stable, with a slight decline to 2030. SVOD investment would continue to grow, but more modestly than in recent years. In this scenario, those producing for PSB off-peak would likely be affected as well as those that make PSB peak-time genres that are now being deprioritised.

Total commissioning spend illustrative forecast 2016 - 2030

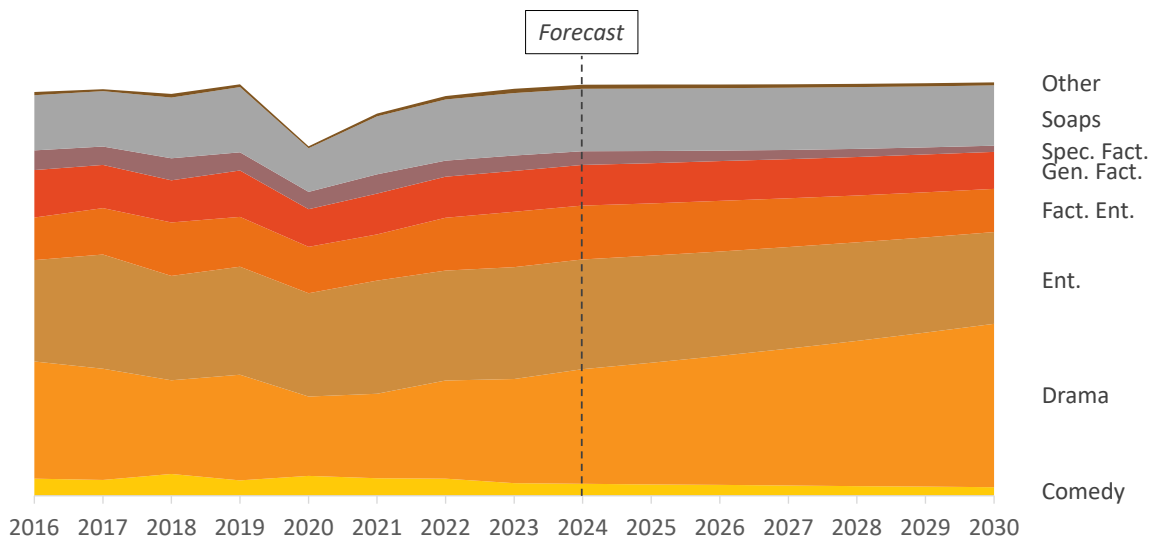


Note: Excludes news, current affairs, sports and film. Only includes main 5 PSB channels – BBC1, BBC2, ITV, Channel 4 and Channel 5. SVOD includes Apple, Amazon, Disney+, HBO Max, Hulu, Netflix and Paramount+. Multichannel includes Sky, UKTV and multichannel defined by Ampere as ‘Other’. Also includes BBC and commercial PSB portfolio channels. Only includes original programming for SVOD and Multichannel. Years refers to release dates.

Source: Oliver & Ohlbaum estimates, informed by O&O Producer database and Ampere Analysis

In particular, PSB peak-time investment would continue its shift towards Drama. Although they could still see modest growth in nominal terms, other genres would see their share of total peak spend shrink. This would affect peak Specialist Factual, Factual Entertainment, Entertainment and Comedy programming in particular. For Factual Entertainment, PSB could move towards a focus on marquee reality formats.

Total PSB five main channels spend illustrative forecast, peak time

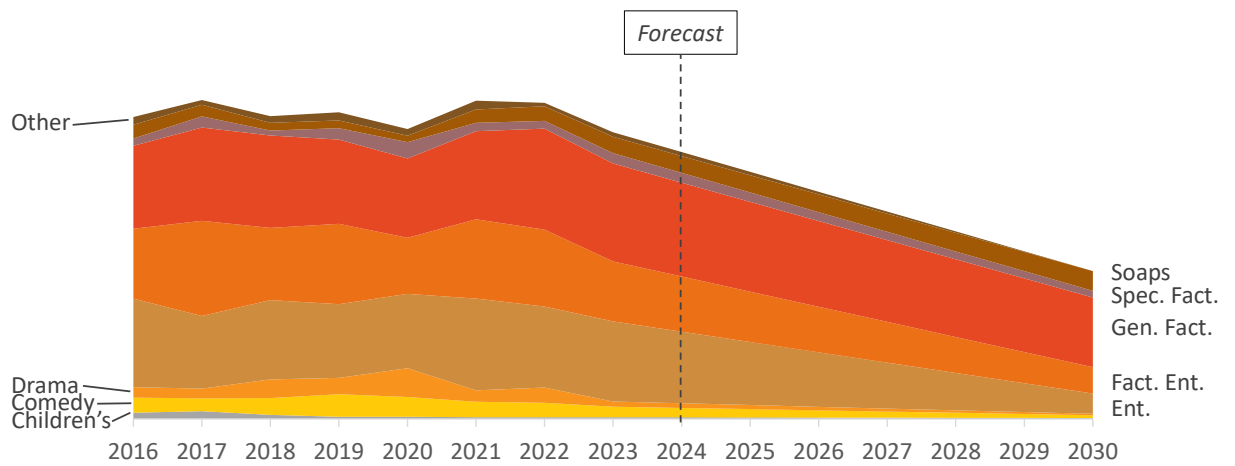


Note: Excludes news, current affairs, sports and film. Only includes main 5 PSB channels – BBC1, BBC2, ITV, Channel 4 and Channel 5. Years refers to release dates. ‘Other’ includes: Arts & classical music, Religion & ethics, Education and Other

Source: O&O Producer Database, Oliver & Ohlbaum analysis

Turning to PSB off-peak investment, while the total spend on General Factual would decrease in our illustrative forecast, this would be to a lesser degree than other genres, meaning it could account for a greater share of PSB off-peak spend by 2030, with other genres losing both share and in absolute terms.

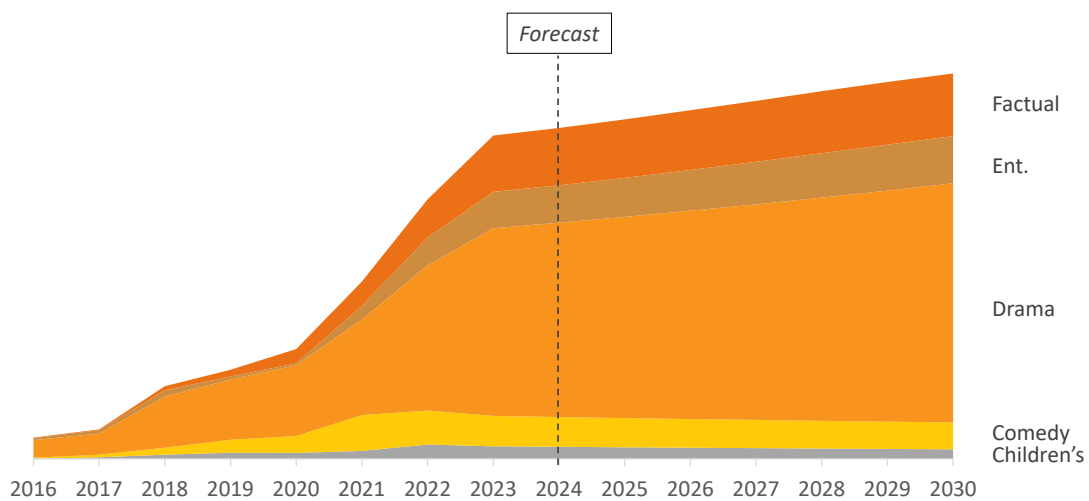
Total PSB five main channels spend illustrative forecast, off-peak



Note: Excludes news, current affairs, sports and film. Only includes main 5 PSB channels – BBC1, BBC2, ITV, Channel 4 and Channel 5 Years refers to release dates. 'Other' includes: Arts & classical music, Religion & ethics, Education and Other
 Source: O&O Producer Database, Oliver & Ohlbaum analysis

Our illustrative forecast for SVOD would see Drama and Entertainment grow share of spending. Factual programming's share would hold steady. Meanwhile, genres such as Comedy and Children's would see their total spend somewhat decline and account for a smaller proportion of SVOD spend by 2030.

Total SVOD spend illustrative forecast



Note: Excludes news, current affairs, sports and film. VOD includes Apple, Amazon, Disney+, HBO Max, Hulu, Netflix and Paramount+. Only includes original programming. Years refers to release dates.
 Source: Oliver & Ohlbaum estimates, informed by Ampere Analysis

Overall, the genres most negatively impacted by changing commissioning priorities would be largely those genres that support the broadest range of production company types (companies based in the Nations and Regions, small and medium-sized producers, qualifying independents, genre specialists and new companies). As such, the developments in our illustrative forecast would likely mean a more homogenous production sector, with loss of variety in terms of producer size, location, genre specialism and ownership.

Further progress in the improving the diversity of off-screen talent and crew would also come under pressure

In terms of the diversity of off-screen talent and crew, our illustrative forecast means that the genres currently providing more opportunities for representation, relatively speaking, would come under further pressure, especially

The genres with falling investment also provide vital opportunities to improve the diversity of off-screen talent and crew

the volume and range of returning unscripted strands, such as Factual Entertainment. This scenario could also mean less progress is made in the genres that currently have mid-levels of off-screen diversity, such as Specialist Factual, which is in decline.

With tighter budgets, opportunities for training, shadowing, and career progression would be reduced, making it more difficult to support a diverse pipeline of talent. Fewer productions could also mean fewer job opportunities, affecting both new and experienced professionals and potentially limiting the range of voices in the industry.

While total commissioning spend on high-end Drama is expected to increase in our forecast, that accounts for fewer productions. There is an important opportunity for high-end Drama to continue to increase the diversity of its off-screen talent and crew. However, this would likely not compensate for the reduction in opportunities across unscripted and off-peak productions.

62 per cent of respondents said that lower overall commissioning spend and a changing genre mix will make it harder to make further progress on off-screen diversity at their company

In our survey, diverse led companies were more concerned than all respondents about future off-screen diversity, responding more strongly that they expected things would get worse across all seven factors for diversity that we tested.⁷

Depending on the degree of polarisation in commissioning and the rate of change, the cycle of creative renewal could be challenged

The total number of production companies increased in response to the rise in content investment around 2021. It is normal to see exits or consolidation in response to competition or falling demand.

In our interviews, many producers highlighted how they are entrepreneurial and proactively looking for opportunities to adapt and diversify, including moving into adjacent genres and building partnerships with other producers or distributors, and moving into related areas such as virtual production, facilities and brand marketing for social media.

Producers said they are entrepreneurial and looking to diversify

⁷ The seven factors included in our survey were: willingness to commission works by diverse writers or directors; willingness to commission works about diverse protagonists, stories or issues; access to training for a diverse range of people; awareness of career opportunities in the industry for a diverse range of people; ease of entry to the industry for diverse talent and crew; retention of diverse talent and crew; opportunities to progress for diverse talent and crew

However, adapting and diversifying requires resources and investment to bring in new talent with existing contacts in the target market, train staff in new specialisms and cover overheads while developing the new business areas. Interviewees felt that the current shift in commissioning strategy is fast, and they were concerned that some independent producers with prospects may not have the chance to evolve naturally, especially since it comes on the back of wider economic shocks (the pandemic, the war in Ukraine). The AV sector will want to avoid an accelerated loss of valuable talent, including from diverse groups, that does not return to the industry in the UK.

Pivoting to a new genre requires capital and talent with an existing network in the target market

Depending on the degree of polarisation in the sector and the rate of change in the coming years, the big risk is the cycle of creative renewal coming under pressure. In this scenario, small and medium-sized producers would not be able to gain the necessary experience, reputation and investment to grow and access higher value commissions or move into other genres. Low-cost unscripted programmes are low margin with low secondary sales and little residual value.

The risk threshold for investors would rise for small and medium-sized producers, leaving them to rely on existing ideas and returning series.

New producers would be more likely to be owned by established talent and those with contacts. Meanwhile, the larger producers and in-house Studios could not benefit as now from acquiring innovative and growing producers to refresh and reinvigorate their businesses.

For off-screen talent and crew, it would also be riskier and less feasible to enter the industry and survive without an existing network, or to move into new genres and higher budget opportunities, which could particularly affect underrepresented groups.

This would affect UK commissioners and audiences

Over time, commissioners and audiences could miss out on new stories and new voices that reflect the diversity of the Nations and Regions in the UK, and particularly those who are currently underrepresented. The PSB ecosystem could become somewhat weaker without being able to draw on the current richness of talent and ideas in the UK production sector.

It could also affect the UK's global competitiveness and ability to attract inward investment

This potential future scenario also needs to be considered in a global context. The screen sector has become much more competitive, with different countries and regions working to strengthen their domestic audiovisual sectors, increase exports and attract inward investment – which is mobile. Some of the UK's clear advantages in attracting and retaining investors have been the reputation of its producers and its skilled talent and crew, along with strong local broadcasters as talent incubators and potential co-commissioning partners. If these advantages were to gradually fade, some international investment could move, in turn further weakening the UK's AV ecosystem.

Key Quotes from Producers

Below are key quotes from our interviews with independent production companies.

Polarisation in commissioning seems to be emerging between the largest and the very smallest producers and programme budgets

'We would do a lot of work in the higher volume, lower tariff area. And we can see those margins being squeezed quite considerably. I know specialist programming companies are struggling because they have to get so many different funders involved. Only the companies with really deep pockets are able to finance both the cost of sale and the development' – Nations based, female led, Factual Entertainment and Entertainment independent producer

Production companies across the Nations and Regions are affected

'Without the mid-range companies, how do you build capacity in the Nations and Regions?' – Scotland based, female led, high volume Factual independent producer

Producers are entrepreneurial and looking to diversify, but say they need the chance to adapt

'Besides our TV business, we have just recently moved into virtual production, and we've made Ireland's first and the UK's first multi camera virtual production game show in Northern Ireland, which we intend to take into Studio Ulster, which is the new virtual production studio, the first in Europe' – Nations based, female led, Factual Entertainment and Entertainment independent producer

'Broadcasters are going to have a new strategy, but please ratchet it carefully so that you can take the industry with you. We will not see the great British television we've seen before, and then we'll stand back and say, 'Well, why is that?'' – Nations based, Factual and Entertainment independent producer

Further progress in improving the diversity of off-screen talent and crew could come under pressure

'The immediate impact of the downturn is to make it harder for production companies, particularly small ones, to take risks on staffing... The people that are much harder to get into the industry are those that don't come from middle class backgrounds. For those with intersectionalities it is even harder. It will be really tough for working class black, brown and disabled people, both those entering the industry and those who are already in the industry' – Nations based, independent producer

The cycle of creative renewal could be challenged, affecting UK commissioners and audiences

'When it's a slow market, when there's less money, people are naturally more risk averse, and that means that they're not going to take a bet on small indies. People are just less open to try new things. There's less money, there's less creative risk. That's why you see a lot of reboots. So when you're an indie that wants to offer new, original formats, original content, maybe new talent, that does tend to get squeezed out of consideration' – Regions based, diverse led, female led, Factual Entertainment and Factual independent producer

Introduction

1 Introduction

Pact, the UK screen sector trade body for independent production and distribution companies, has commissioned Oliver & Ohlbaum Associates (O&O) to examine recent trends in UK TV commissioning, set out a forecast scenario if these trends continued, and consider the impact on sustainable growth in the UK production sector and the diversity of off-screen production talent and crew.

1.1 Background

The UK is home to a globally successful TV production sector with a mix of production companies in terms of size, genre focus and location across the country. Many are global experts in their field, serving UK commissioners, attracting international clients and exporting British content and formats around the world.

However, the audiovisual (AV) sector is a finely balanced ecosystem, and recent events have revealed stresses. While the pandemic was followed by a period of exuberance in commissioning, we have since seen a prolonged slowdown affecting producers and off-screen talent and crew, with knock-on effects along the value chain. Moreover, the AV sector is facing both structural challenges and cyclical pressures: a gradual transition from linear to on-demand viewing and increasing viewing fragmentation across multiple AV services, declining linear advertising revenues that are not yet made up for by digital revenues, ongoing pressure on the licence fee and a global slowdown in content investment as VOD services and studios prioritise profitability. The US writer and performer strikes, slowdown in US investment and turbulence in the wider economy, including cost inflation, exacerbated the situation.

To pursue efficiency, PSB commissioners are reprioritising their content investment towards certain genres and budget ranges – aiming for ‘fewer, bigger, better’ productions that cut through and support viewing on VOD, especially high-end Drama and Factual, as well as peak-time Entertainment. In this report we examine this trend, set out a scenario to illustrate what content investment may look like in 2030 if current trends continue, and consider the potential impact on the variety of production companies in the sector. We then consider what any financial pressures may mean for the diversity of off-screen production talent and crew and producers’ ability to create an inclusive culture.

As such, our report is intended to start a conversation about what the UK wants for its production sector and those who work in it – are we content with the direction in which the sector is heading? The Ofcom PSB Review, Future of TV Distribution review and upcoming BBC Charter review will shape the UK’s PSB for the transition to IP – we must consider what this next phase looks like so that the ecosystem can thrive in an all-IP world.

1.2 Methodology

We have used a combination of qualitative and quantitative approaches to develop a comprehensive evidence base and capture a range of perspectives. Our methodology includes market data analysis, a literature review, a survey of independent producers and an interview programme. Further information on the methodology is in the Appendix.

1.3 About O&O

O&O is a leading independent advisor on the media, entertainment and sport sectors, with practice areas across policy and regulation, strategy, investment and commercial advisory. We have an in-depth understanding of the competitive dynamics of the UK’s TV and film industries and have been a specialist advisor on the production sector for over two decades. As part of this, O&O has worked on competition assessments, market sizing and value chain analysis, production and commissioning strategies, buy and sell side transactions and public policy around fiscal incentives, territoriality of rights, and production regulation including the PSB Terms of Trade and quotas. In doing

so, O&O has worked for major broadcaster and VOD commissioners, independent producers, investors, trade associations, Ofcom, DCMS, Screen Scotland and the European Commission.

The TV sector has responded to disruption, but stresses have emerged

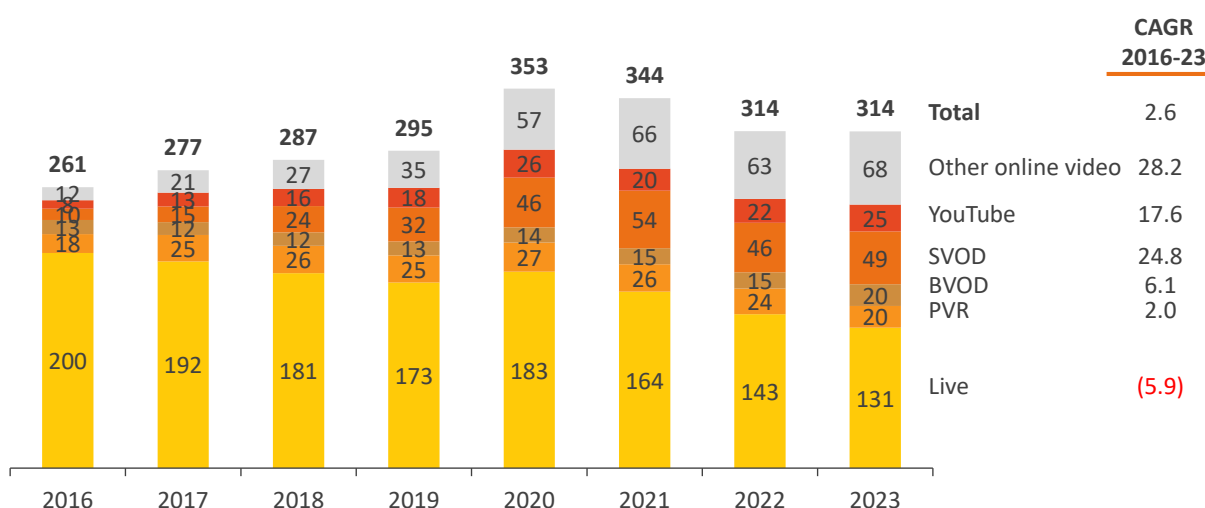
2 The TV sector has responded to disruption, but stresses have emerged

This part discusses recent changes in the UK TV sector and how, while the sector has been responding to disruption, stresses have emerged.

2.1 Viewing is changing

With an increased choice of services and competition for audiences, total daily average viewing time has steadily increased since 2016 (with a peak at the time of the pandemic) (**Figure 1**, below). However, the viewing mix is fragmenting across different types of services, with subscription VOD (SVOD) services, YouTube and other online video all seeing significant increases. At the same time, we can see a steady decrease in viewing to live TV; while viewing to broadcaster VOD (BVOD) services is increasing, this has not yet offset the decline.

Figure 1: UK daily average viewing time by type, 2016-23, minutes per person per day (Adults, 16+)

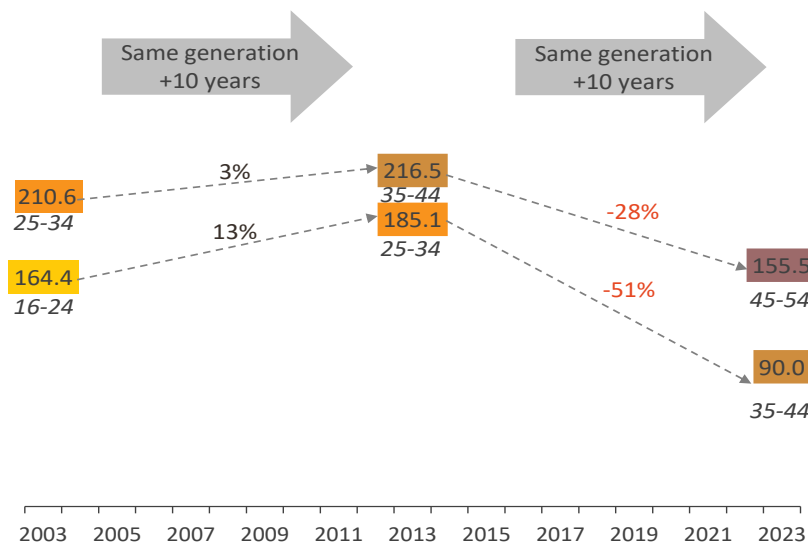


Note: 'Other online video' includes TikTok, Facebook, other social media/ video sharing platforms and all auto-play across all publishers

Source: Ofcom, Thinkbox, Oliver & Ohlbaum analysis

The transition has been led by younger viewers. We have historically seen a 'life stage effect', resulting in people watching more live TV as they age (**Figure 2**, 2003-2013). However, with the growth of connected devices, VOD services and short form video, older people are adopting the habits of the younger generations, accelerating the change in overall consumer viewing habits.

Figure 2: UK daily linear viewing time by age group cohort, 2003-2023, individuals (4+), average minutes per person per day, live and 7-day catch up, TV set viewing

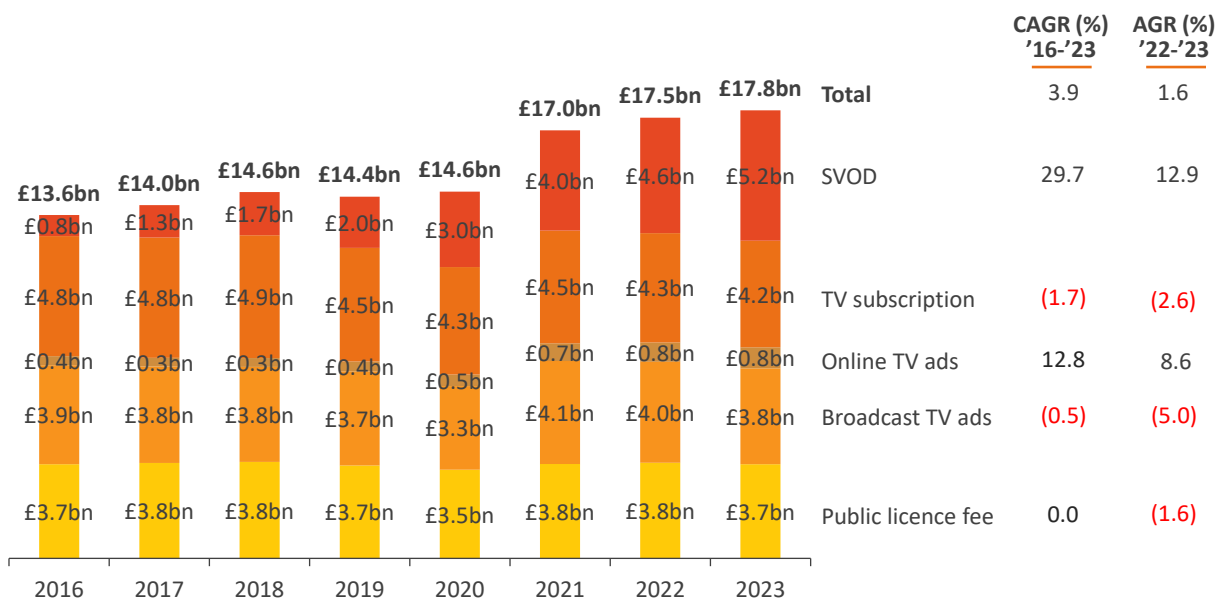


Source: BARB, Ofcom, Oliver & Ohlbaum analysis

2.2 The UK TV sector has responded, growing revenues and content spend

As seen in **Figure 3**, total TV sector revenues grew strongly in 2016-2023, rebounding after the pandemic. SVOD service revenues grew the most, by 29.7 per cent CAGR 2016-23. Online TV advertising on broadcaster-owned websites and apps also showed a good rate of growth (12.8 per cent CAGR) as broadcasters invested to meet consumer and advertiser needs online. On the other hand, broadcast TV advertising revenues rebounded after the pandemic but then fell back, and the licence fee was stagnating.

Figure 3: UK TV revenues by segment, 2016-2023, £bn

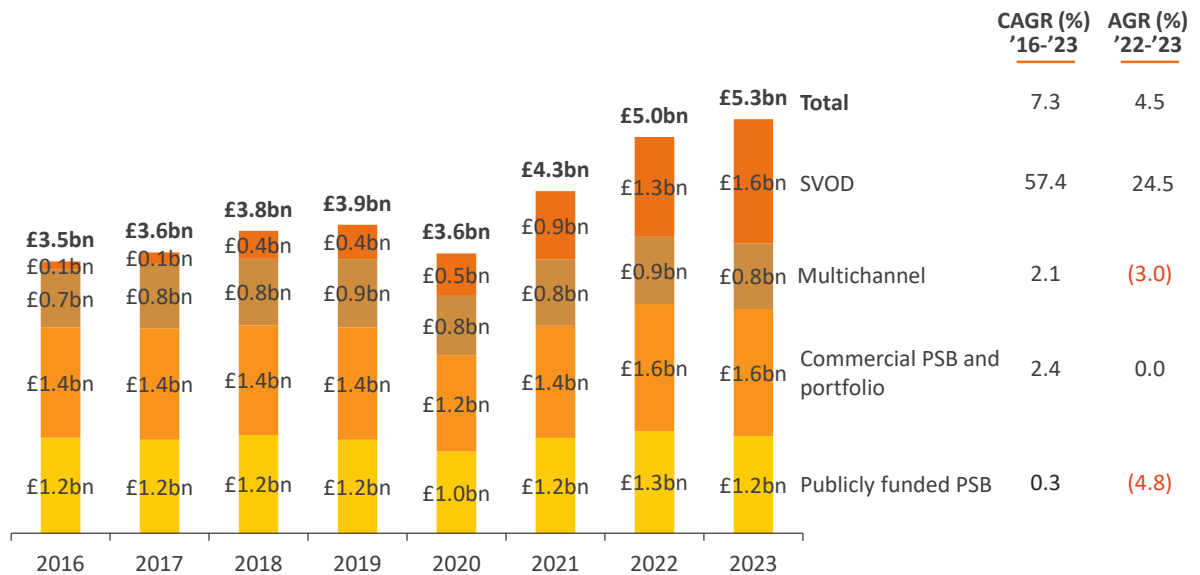


Note: Online TV advertising includes revenues only from broadcast TV content viewed online on broadcaster-owned websites and apps, and excludes TV content viewed on sites not owned by broadcasters. This metric includes broadcaster video-on-demand (BVOD) revenue.

Source: PwC GEMO, BBC Annual Reports, Oliver & Ohlbaum analysis

Overall, growth in original content investment has grown even more strongly, increasing at 7.3 per cent CAGR in 2016-2023 (Figure 4). This has been driven by strong growth in SVOD investment, which increased by 57.4 per cent over the period. The chart also illustrates how original content investment bounced back after the pandemic, particularly from SVOD services, along with some increases for PSB, but then slowed.

Figure 4: UK content investment by service type on original programming, 2016-2023, £bn



Note: Excludes films with theatrical releases. Some year-on-year change in multichannel spend, e.g. from 2022 to 2023, likely driven by broadcasters moving commissioning on their linear multichannels to their on-demand SVOD services. Publicly funded PSB includes only BBC and BBC PSB portfolio channels, such as regional and children’s channels.

Source: Ampere Analysis, Oliver & Ohlbaum estimates and analysis

The sector has changed significantly since 2016, evolving from three major commissioning groups in 2016 to four in 2023. These groups are distinctive and complementary – PSB invest in a high volume of original content across genres and budget ranges and from across the UK. They aim to serve both mass audiences and niches, often focusing on UK stories that include UK talent and reflect audiences’ daily lives and concerns. Multichannel broadcasters provide a steady stream of additional commissions, including in specialist genres and at different budget levels. SVOD services invest in very high-end Drama, alongside some Factual, meaning that their total spend relates to fewer commissions than for the broadcasters, in line with their business models. There were 30 SVOD commissions in the UK in 2023 and 1,391 from the main PSB channels (number of titles).⁸

2.3 But stresses have emerged

Recent developments in the sector and wider economy have revealed underlying stresses in the UK TV sector.

2.3.1 The economic slowdown has hurt the sector

The economic downturn and high inflation have led to a squeeze on advertiser spending while reductions in discretionary consumer spending have affected subscriptions to pay TV and SVOD services. At the same time, the BBC’s licence fee has been frozen. The impact of this is shown in Figure 3; between 2022 and 2023, broadcast TV ad

⁸ The main PSB channels are BBC One, BBC Two, ITV, Channel 4 and Channel 5. SVOD includes Netflix, Prime Video, Apple TV+ and Disney+. O&O Producer database, Ampere Analysis.

revenue fell by 5 per cent, pay TV revenues fell by 2.6 per cent, and public licence fee funding fell by 1.6 per cent, in nominal terms. Meanwhile, the rate of growth for online TV ad spending slowed to 8.6 per cent in 2022 to 2023, compared to 12.8 per cent rate over the period from 2016, and the rate of SVOD revenues slowed to 12.9 per cent compared to the 29.7 per cent rate over the whole period.

2.3.2 Cost inflation has been a further complication following the pandemic

With work drying up during the national lockdowns, many had to leave the sector to find work and did not return; this resulted in resource shortages and content cost inflation as the sector bounced back and increased commissioning spend. However, in 2023, falling revenues and the US writers and performers' strikes and reorganisations led to another drop in total UK commissioning spend and inward investment projects. The sudden drop in the number of projects has led to further off-screen talent and crew leaving the industry. This is also a problem for workforce diversity; those without independent means and existing networks need to leave to seek other work.

2.3.3 Commissioners and other investors have become more risk-averse

Related to the pressure on PSB and other broadcaster or SVOD budgets, content investors have become more risk averse.

Lindsay Salt, Head of BBC Drama, February 2024 – “We’ve seen buyers retreat into cautious commissioning spaces...The industry as a whole has become – dare I say it – a little fearful”... “Inflation, content and platform saturation, retrenchment and the writers’ strike” are leading to “peak caution”, when five years ago “everyone was willing to make brave choices, to experiment, to try something a little unorthodox.”⁹

In our interview programme, we heard from independent producers that this caution extends to international distributors. In high-end scripted productions, PSB commissioning fees are not sufficient to cover the cost of production; independent producers are responsible for bringing together a patchwork of other funding sources, including international distribution. Traditionally, a funding commitment by a UK PSB would encourage other investors to come to the table. However, we heard in interviews that the US market has become more risk averse and unwilling to invest, leaving some UK Drama projects with UK broadcaster support in a ‘holding pattern’.

2.3.4 These factors have resulted in a commissioning slowdown

As seen in **Figure 4**, there has been a recent slowdown in original content spending coinciding with the cost pressures facing commissioners. Commissioning spend by the BBC declined 4.8 per cent between 2022 and 2023, while commercial PSB commissioning spend was flat – or declining once we allow for inflation. SVOD content spending has continued to grow but is showing signs of slowing; the growth rate dropped to 24.5 a year in 2022-2023, with their strategy to pursue subscriber growth replaced by a focus on profitability and efficiency. The underlying factors have meant that the commissioning spend slowdown has extended into 2023/24.

As well as smaller PSB commissioning budgets, there is a shift in the mix of genres and budget levels. PSB are changing their commissioning strategies to focus on ‘fewer, bigger, better’ productions that can cut through and drive viewing on their VOD services. Remaining spend is moving towards higher budget genres, especially high-end

⁹ <https://deadline.com/2024/02/bbc-drama-boss-lindsay-salt-peak-caution-1235832889/>

Drama and Factual, as well as some peak-time Entertainment. Meanwhile, the number and value of commissions in factual genres and programmes traditionally broadcast in daytime has been cut.

Alex Mahon Channel 4, April 2024 – ‘I fear that [the slowdown in commissioning] is going to create a step-change in the amount that is spent on content because there’s going to be a bit of re-correction... Also, with the shifts in how viewers watch things, there are going to be high-end things that stream and repeat really well, and there’s going to be lots of cost-effective things that go on linear channels and the middle is going to disappear’.¹⁰

2.3.5 This has implications for the health and sustainability of the UK TV production sector

Reduced PSB commissioning budgets and the change in mix of commissions have implications for the health and sustainability of the UK TV production sector. The sector has evolved significantly over the last twenty years, responding to changing consumer needs and expectations and content buyer priorities. However, recent years have brought significant and sudden shifts in commissioning, from the pandemic to the economic downturn and the US writer and performer strikes and investment slowdown. Will producers and the production workforce have the opportunity to adapt and diversify this time, or is the change so deep and fast that valuable talent risks being lost?

It is vital to understand the impact of these PSB commissioning shifts given the contribution of the production sector to innovation, creativity and growth in the UK television, benefitting audiences across the UK, growth and inward investment and the UK’s reputation abroad.

¹⁰ <https://www.broadcastnow.co.uk/channel-4/alex-mahon-slowdown-will-create-step-change-in-content-spend/5192550.article>

The health of the UK
production sector is under
pressure

3 The health of the UK production sector is under pressure

In this part we examine in more detail how recent commissioning trends have affected different types of production company and the overall balance of the sector, drawing on market analysis and our stakeholder survey and interviews.

3.1 The UK production sector features a variety of production company types

The UK TV production sector consists of a mix of production companies by size, ownership status and genre focus. They are located across the UK, supporting investment and job opportunities in the Nations and Regions. Many of these producers are global experts in their field, serving UK commissioners, attracting international investment, and exporting British content worldwide. In addition to a few in-house producers – BBC Studios, ITV Studios, STV Studios and Sky Studios, all wholly owned by broadcasters, there is a wealth of independently owned producers that serve the PSB, multichannels, SVOD services and international buyers.

3.2 The success of the UK TV production sector is built on a cycle of creative renewal

A key feature of the UK production sector is its process of ‘creative renewal’. This is key for sustainable growth, competition and innovation. Thanks to low barriers to entry, creative talent is incentivised to build businesses, often selling them to larger rivals before spinning out and repeating the cycle. This cycle is how established producers and in-house studios gain access to fresh ideas and talent and can diversify and grow. It attracts third party funding to the sector. And it means that commissioners benefit from innovative ideas and audiences benefit from new stories from across the UK.

The cycle of creative renewal has worked extremely well over the last two decades, supported by a balanced PSB regulatory framework, with total independent TV production sector revenues standing at £3.6 billion in 2023.¹¹ In contrast, other major European countries have production sectors with a high share of very small production companies that struggle to grow into medium-sized producers and onwards (the ‘long tail’).¹² Ultimately, viewers benefit. As shown in Ofcom research, audiences seek programmes that authentically portray modern life across the UK,¹³ and a dynamic production sector with a variety of producers is essential if we are to see a broad range of ideas and editorial perspectives on-screen.¹⁴

However, the cycle relies on a continued balance of different production company types in the sector – by genre, size, location and ownership. This in turn relies on balanced commissioning from the UK’s PSB.

¹¹ Oliver & Ohlbaum Associates for Pact, ‘UK Television Production Survey: Financial Census 2024’

¹² Eurostat and Oliver & Ohlbaum analysis, average number of persons employed and average turnover by motion picture, video and television programme production enterprises

¹³ Ofcom: An exploration of people’s relationship with PSB, with a particular focus on the views of young people, 2020

¹⁴ Ofcom: Equity, Diversity and Inclusion in TV and radio 2022/2023

3.3 Indicators can help assess the impact of the commissioning slowdown

We have developed indicators to understand how PSB commissioning supports a varied production sector. We can then consider how the balance of the sector might be affected by changing PSB commissioning.

To create the indicators, we took programmes released in 2023 on the five main PSB channels by genre and daypart (as a proxy for budget level). We allocated each of these a 'relative variety' indicator (Low, Mid or High). This captures the extent to which commissions in a particular genre and daypart support a variety of production company types and therefore contribute to the overall balance of the sector, relative to other genres and dayparts. We looked at producer variety in terms of size (revenues up to £10m per annum), producers based in the Nations & Regions, ownership (qualifying independent producers or QI),¹⁵ genre specialists, and new producers (commissioned for the first time in 2023).¹⁶

3.3.1 General Factual and Specialist Factual support a relatively high variety of production company types

Commissioning in these genres supports the highest variety of producer company types, across both peak and off-peak programming. General Factual includes consumer programmes, lifestyle, daytime magazine and talk shows and generalist documentaries. Meanwhile, Specialist Factual includes history, natural history, science, and business and finance. In particular:

- **Peak programming:** both General Factual and Specialist Factual programming have high proportions of small, new and QI producers.
- **Off-peak programming:** both have high levels of small and QI producers. General Factual has a high proportion of new companies.

3.3.2 Factual Entertainment and niche genres make an important contribution in peak time

Peak time Factual Entertainment and niche genres ('Other', including arts and classical music, education and religion and ethics) are important for providing opportunities to small producers and qualifying independents in peak-time. Factual Entertainment also supports a moderate level of producers based outside of London in peak-time. Therefore, these genres are important to the ongoing health and sustainability of the UK production sector.

3.3.3 Entertainment and Comedy support a moderate mix of production company variety off-peak

Entertainment supports a moderate mix of production company variety off-peak, while Comedy supports a moderate level of production company variety across both off peak and during peak time. Daytime Entertainment traditionally provides a degree of financial stability through long-running, recurring strands, which allow producers to develop other projects alongside. Meanwhile Comedy traditionally allowed producers to develop skills and a reputation in scripted content, and the opportunity to provide returning strands.

¹⁵ The Broadcasting (Independent Productions) Order 1991 states that an independent producer is: (i) not employed by a broadcaster or a person connected to a UK broadcaster; (ii) does not have a shareholding greater than 25% in a UK broadcaster; or (iii) in which no single UK broadcaster has a shareholding greater than 25% or any two or more UK broadcasters have an aggregate shareholding greater than 50%.

¹⁶ We used Ofcom's genre definitions. Further detail on the methodology is in the Appendix.

3.3.4 Drama also supports a moderate mix of producer variety, but with caveats

In peak time, Drama supports a moderate proportion of producers that are small, QI producers and producers based in the Nations and Regions, with high levels of genre specialists. Producers making off-peak Drama are similar in profile except that they are more likely to be based in London.

However, it is important to note that some smaller and newer Drama producers are set up to produce a particular series, usually by established talent, including featured actors. In general, Drama is more likely to involve experienced producers that already have a reputation in the industry, especially for high-end and very high-end Drama, which involve large budgets. For this reason, off-peak Drama and mid-budget Drama have traditionally been important routes for producers and talent to develop and progress towards high-end projects.

3.4 PSB spend on specialist genres is under pressure

As discussed, Specialist Factual supports a high variety of production company types. However, as shown in **Figure 5**, Specialist Factual programming has seen spend gradually decline since 2016. ‘Other’ programming (arts and classical music, education, and religion and ethics), supports a moderate to high variety of production company types, but spend and hours have both declined since 2016. We heard in interviews that the make-up of programmes within factual genres is also changing, with a polarisation between high-end Factual and lower budget strands.

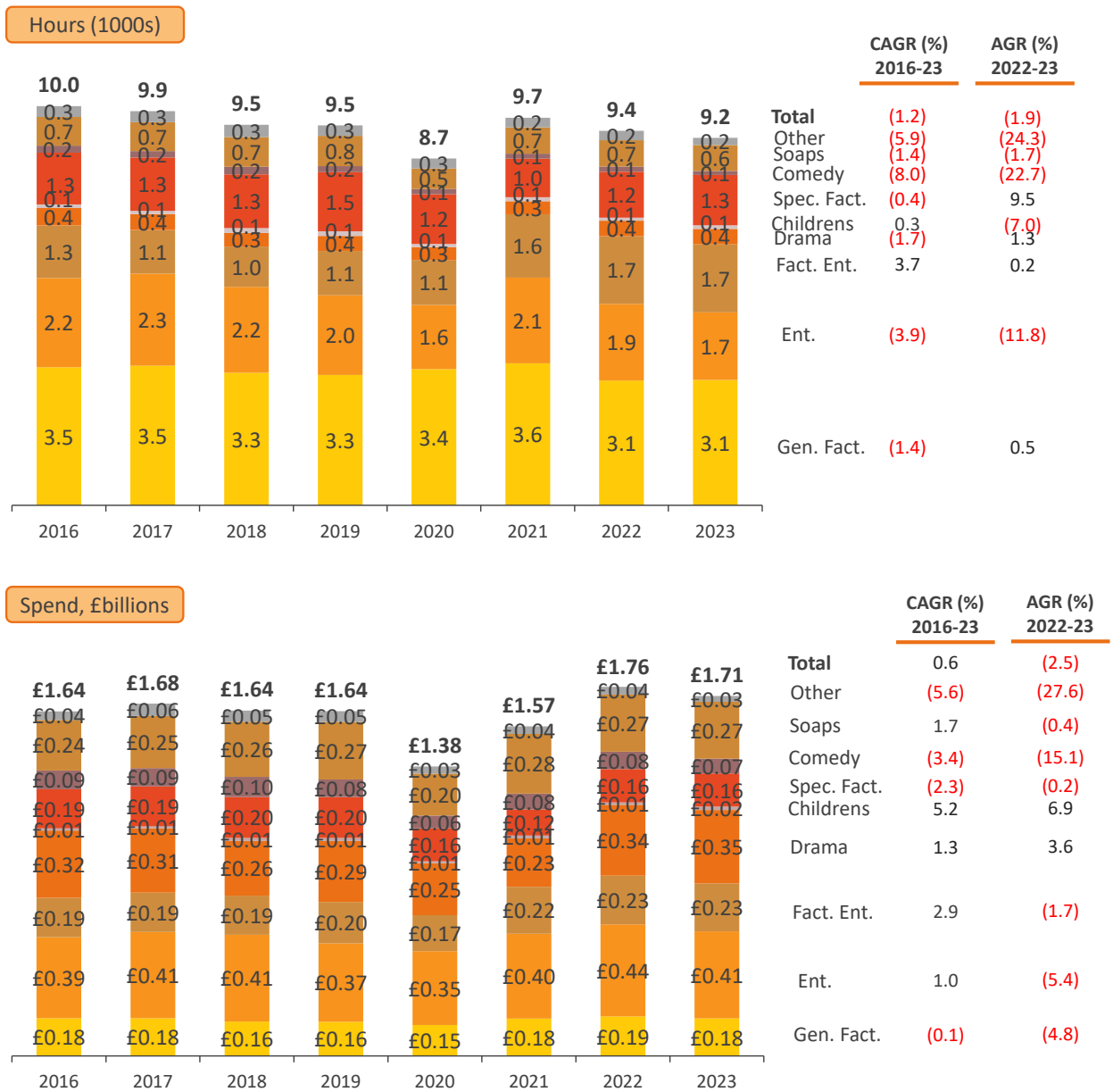
‘The traditional documentary make up has changed. When we started 10 years ago, observation docs were the lifeblood of UK television, outside of your Dramas. They don’t hold the same importance in the schedule and that is sad because that is where a lot of talent is going missing’ – London based, diverse led, Drama and unscripted independent producer

Comedy continues to be affected as scripted budgets are moved towards Drama as part of ‘fewer bigger better’. Although it remains culturally very important in the UK, few hours of Comedy are being made.¹⁷ In addition, secondary markets outside of the UK are less willing to invest in Comedy compared to Drama. As noted in the publication *Broadcast*, industry-wide risk aversion has seen Comedy funding ‘come under particular strain’, with producers noting ‘a structural nervousness’ from the very top across broadcasters and streamers.¹⁸

¹⁷ “No joke: Comedy in Crisis”, *Broadcast*, May 2024

¹⁸ *Ibid.*

Figure 5: UK main PSBs, estimated commissioning by genre, hours (1000s), spend (£bn)



Note: Excludes news, current affairs, sports and film. Years refers to release dates. Includes main 5 PSB channels BBC1, BBC2, ITV, Channel 4 and Channel 5. BBC Portfolio spend has been removed from Ofcom figures using historic known data. Other' includes: Arts & classical music, Religion & ethics and Education

Source: Ofcom, Oliver & Ohlbaum analysis

Hours of Entertainment have declined, suggesting there are fewer commissions or shorter strands and at a higher budget level per hour, likely due to a shift away from daytime Entertainment towards fewer peak time productions. However, off peak Entertainment is important for supporting a 'moderate' level of variety of production companies.

When looking at the picture from 2022 to 2023, the rates of decline in these genres have grown. Drama is the only genre to have seen growth in both hours and spend, with spend rising somewhat faster than hours, indicating an increase in both volume and budget level. However, high-end Drama is more likely to benefit experienced production companies.

3.5 Production companies in the Nations & Regions are affected

TV and film clusters across the UK are delivering growth, bringing significant economic and social benefits to their Nations and Regions, including highly skilled jobs. As shown in separate research from O&O for COBA and Pact on TV and film clusters across the UK, cluster growth and sustainability relies on a mixed ecology of PSB, commercial multichannel and SVOD investment.¹⁹

This has been supported by industrial policy with public-private investment in studio space and an attractive tax relief system. The PSB system and related regulation – PSB Terms of Trade and PSB production quotas, especially for hours and spend in the Nations & Regions – have played a vital role in supporting a steady flow of commissioning in the clusters for different sizes of independent producers, in a wide range of genres, and across different budget ranges. Producers then have the incentives to pursue international investment and exports in relation to these programmes, supporting expansion.

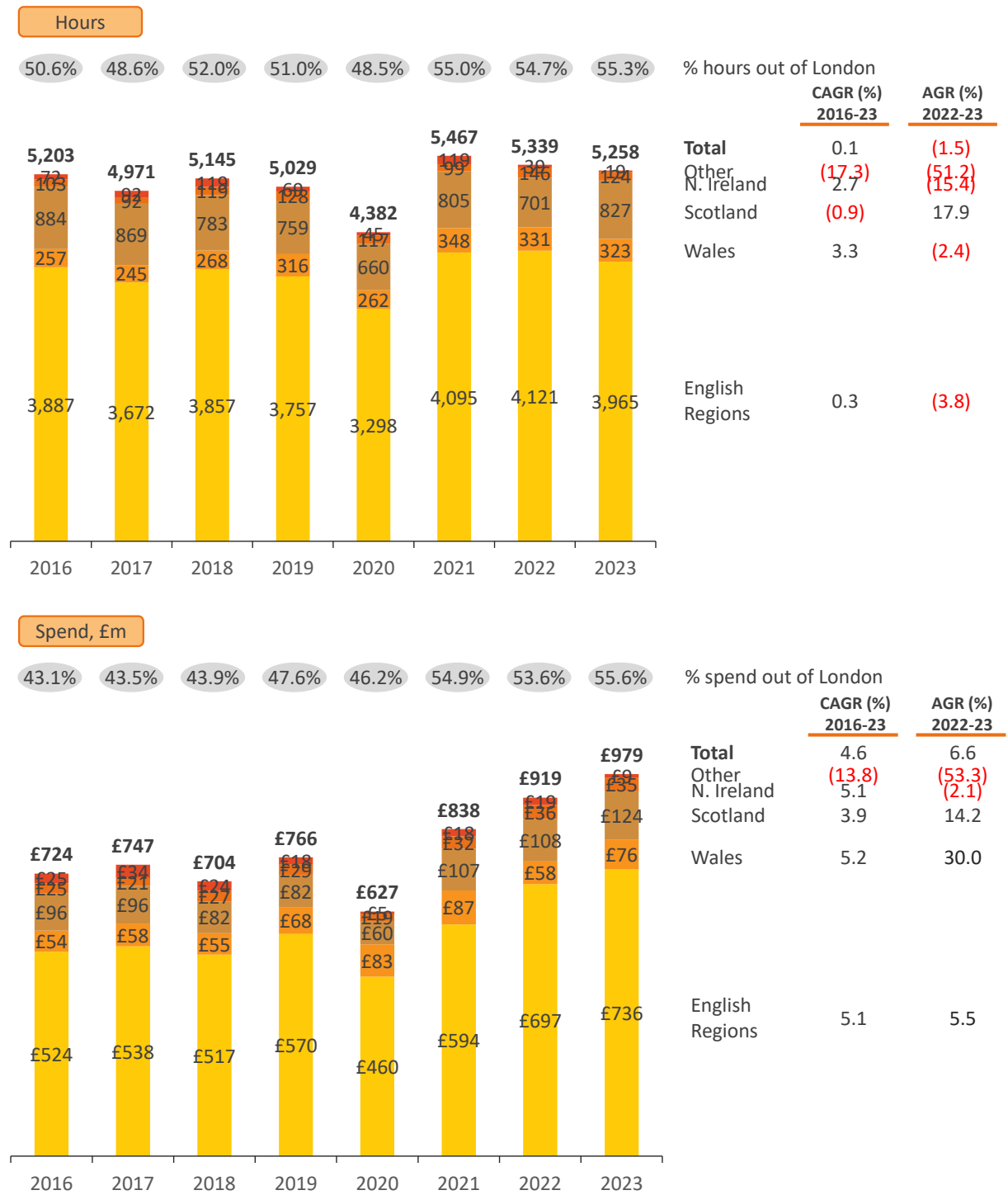
For example, Glasgow’s specialisation had traditionally been seen as Factual and unscripted programming, often for PSB commissioners. It also has noted experience producing drama, often for PSB. Steady investment from PSB provides a crucial ‘backbone’ for clusters, and has enabled Glasgow to invest in diversification, attracting additional investment in HETV drama and film from multichannel broadcasters, SVOD and international studios.

In response to the Channel 4 relicensing process, Pact and screen bodies from the Nations made the case for an increase in the Made out of England quota for Channel 4, together with individual quotas by Nation. Ofcom decided to increase Channel 4’s current Made out of England quota to 12 per cent of hours and spend by 2030.

The ecosystem is complex and finely balanced, and future growth and sustainability are not guaranteed. As seen in **Figure 6**, while commissioning in the Nations & Regions has increased since 2016, there has been a changing commissioning mix. In the English Regions, spend has grown faster than hours from 2016, suggesting a move towards high-end and peak time programming. While high-end Drama commissioning has increased in the Nations, as well as Entertainment in Scotland, there has been a decline in the number of unscripted off-peak commissions and pressure on these budgets. This overall growth, diversification and inward investment is welcome. However, maintaining a mixed ecology is important – lower budget, returning strands provide financial stability, allowing production companies to enter, build a reputation, reinvest and grow. This is especially relevant in places that are seeking to create and grow an audiovisual cluster.

¹⁹ ‘Screen sector clusters: securing sustainability and growth’ A report for COBA and Pact prepared by Oliver & Ohlbaum Associates, 2025

Figure 6: Estimated UK PSB qualifying network commissioning by Made outside London location, hours, spend £m



Note: Includes only qualifying network production on the main 5 PSB channels (BBC1, BBC2, ITV, Channel 4 and Channel 5). Only includes first-run programmes made within the UK, as per Ofcom definition – excludes news programmes and sports rights. Other denotes productions which did not meet 70% of spend and 50% of talent in any one particular nation or region

Source: Ofcom, Oliver & Ohlbaum analysis

Interviewees we spoke to that were based in the Nations expressed a range of concerns:

‘Without the mid-range companies, how do you build capacity in the Nations and Regions?’ – Scotland based, female led, high volume Factual independent producer

‘Scotland has been hit because it has a predominance of factual companies, and this downturn is definitely hitting the factual community hard, which in turn is hitting the freelancers hard’ – Nations based, female led, Drama independent producer

‘A lot of the companies [in Northern Ireland] are feeling extremely vulnerable, particularly the unscripted companies, that they will be squeezed so much that they won't be able to trade. They'll be reduced to kitchen table companies. That will make [the industry in Northern Ireland] unsustainable – that's cottage industry nonsense that we have worked really hard to try and get away from and professionalise ourselves. And it feels like we could potentially be going back to that’ – Nations based, female led, Factual Entertainment and Entertainment independent producer

Interviewees underlined that they provide high quality shows that work on nationwide and international channels and should be equally considered for such commissions.

‘We don't always say that we are based in the Nations & Regions anymore, because we've realised that there are preconceived ideas about those producers and the type of show that we should be allowed to make. There's sort of an unconscious bias...’ – Nations based, female led, working class, Drama independent producer

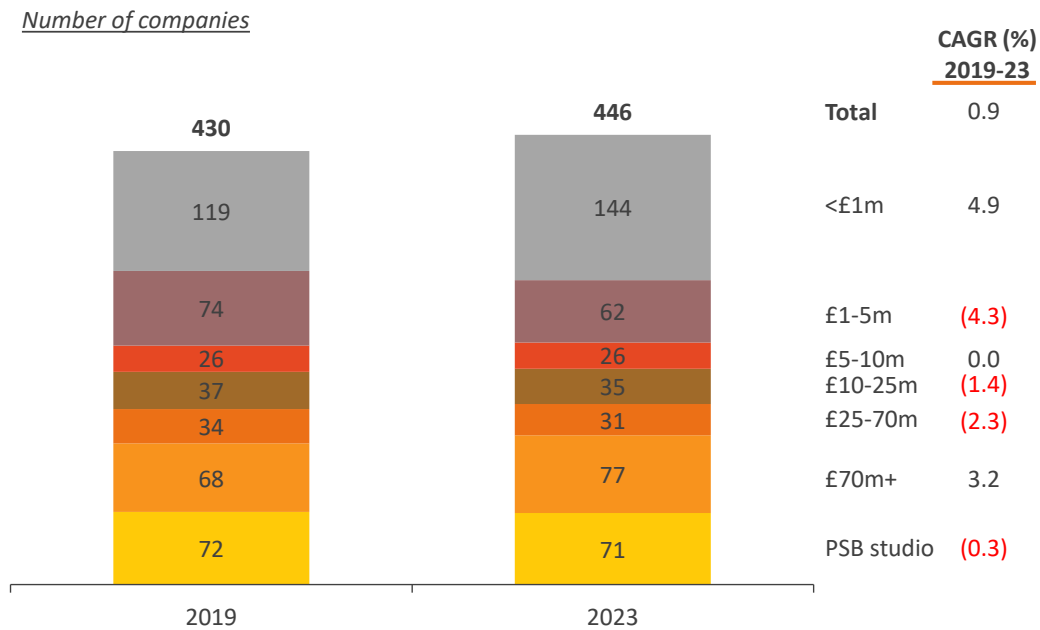
3.6 There are implications for small and medium-sized producers

As a result of lower PSB commissioning budgets and a changing genre mix, small and medium-sized producers are being affected. As commissioning budgets are under pressure, commissioners are seeking to manage risk and to keep down costs, including for lower budget genres and dayparts.

3.6.1 The number of commissions by the main PSB channels has moved towards the largest and the very smallest producers

Figure 7 shows the number of production companies commissioned by the five main PSB channels, comparing 2019 to 2023. The number of large production companies commissioned (those with over £70 million/ year revenues) has risen somewhat. Meanwhile, there has been a change in the type of small companies used, with growth in those with under £1 million/ year revenues and a fall for those with £1-£5 million/year revenues. Meanwhile, the number of commissions from mid-sized producers (£10 million - £70 million/ year revenues) has also declined.

Figure 7: Estimated number of companies producing PSB TV content 2019 vs 2023 by turnover band (excluding certain genres and based on PSB commissions)



Note: Excludes companies who produce news, current affairs, sports, and film. Only includes companies who have been commissioned by main 5 PSB channels BBC1, BBC2, ITV, Channel 4 and Channel 5. PSB Studio refers to any label from a UK PSB that was commissioned by one of the 5 PSB network channels, it therefore includes labels from regional PSBs, such as STV

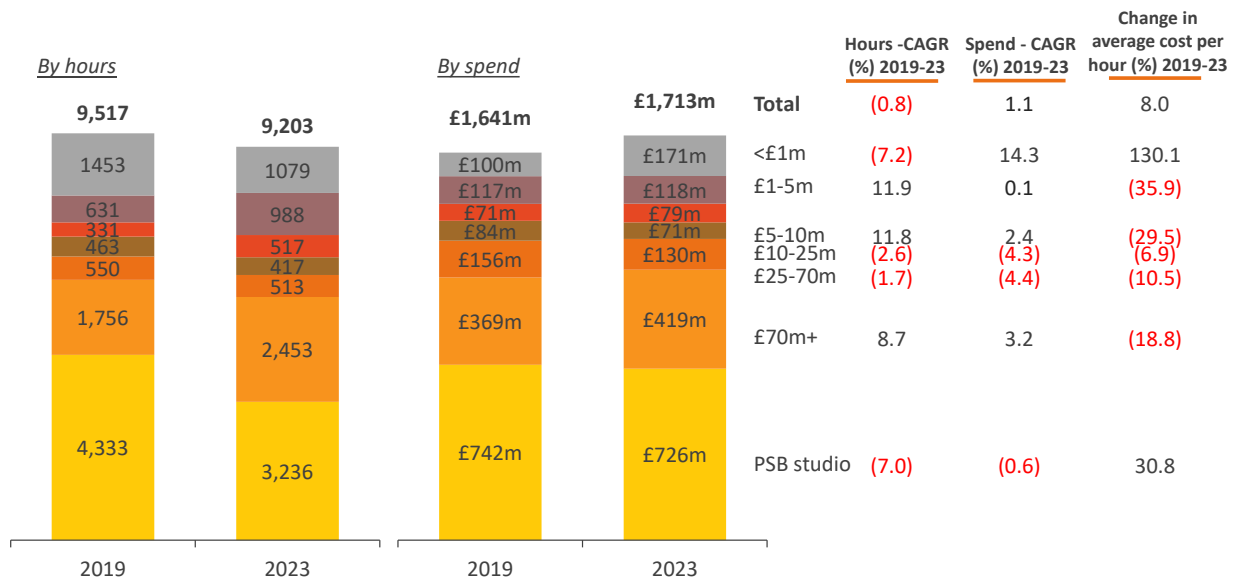
Source: O&O Producer Database , Oliver & Ohlbaum analysis

This suggests that small and medium-sized producers are squeezed, with a polarisation in commissioning between the largest and the very smallest production companies.

3.6.2 The average value of commissions for the different sizes of producer is also shifting

If we look at the number of hours commissioned by the five main PSB channels from different sized production companies and estimate the associated level of spending (**Figure 8**), again we can see commissioning moving towards the largest and the very smallest producers.

Figure 8: UK main PSBs, estimated commissioning by company size, 2019 vs 2023, hours, spend £m



Note: Excludes companies who produce news, current affairs, sports, and film. Only includes companies who have been commissioned by main 5 PSB channels BBC1, BBC2, ITV, Channel 4 and Channel 5. PSB Studio refers to any label from a UK PSB that was commissioned by one of the 5 PSB network channels, it therefore includes labels from regional PSBs, such as STV

Source: O&O Producer Database , Ofcom, Oliver & Ohlbaum analysis

This trend was observed by our interviewees, which are of different sizes and focus on different genres.

‘The middle seems to be going from television... The volume, low budget programming will just become incredibly competitive ... A lot of companies can't do the top end, so they will go into the low cost...’ – Regions based, factual genres independent producer

‘Really premium is still wanted, and the very low tariff is wanted. But the middle band is where they've been hit, the biggest impact of the downturn’ – Regions based, female led, high volume Factual independent producer

‘What we're looking at is a very severe kind of dissection between two types of programming and budgets. It seems like most broadcasters seem to be going for streaming, high end elements... glossy, which draws an audience. And then the second thing that they seem to be going for is high volume low budget. And that seems like the two ponds that we're going to be able to fish in’ – Regions based, factual genres independent producer

There is resulting in a change in the make-up of the genres being made, for example with polarisation between high-end Factual and lower tariff strands. For those whose specialism sits in the higher volume, lower tariff end, it is becoming even more challenging to close production budgets and cover costs.

‘We would do a lot of work in the higher volume, lower tariff area. And we can see those margins being squeezed quite considerably. And there's now more of a role for companies to bring in brands to their programming, to bring in deficit funding, to bring in screen partners. So there's a lot of work involved in getting a commission that is not a billable hour, and we struggle then to make recoveries once we get the commission. We're really fighting against diminishing margins’ – Nations based, female led, Factual Entertainment and Entertainment independent producer

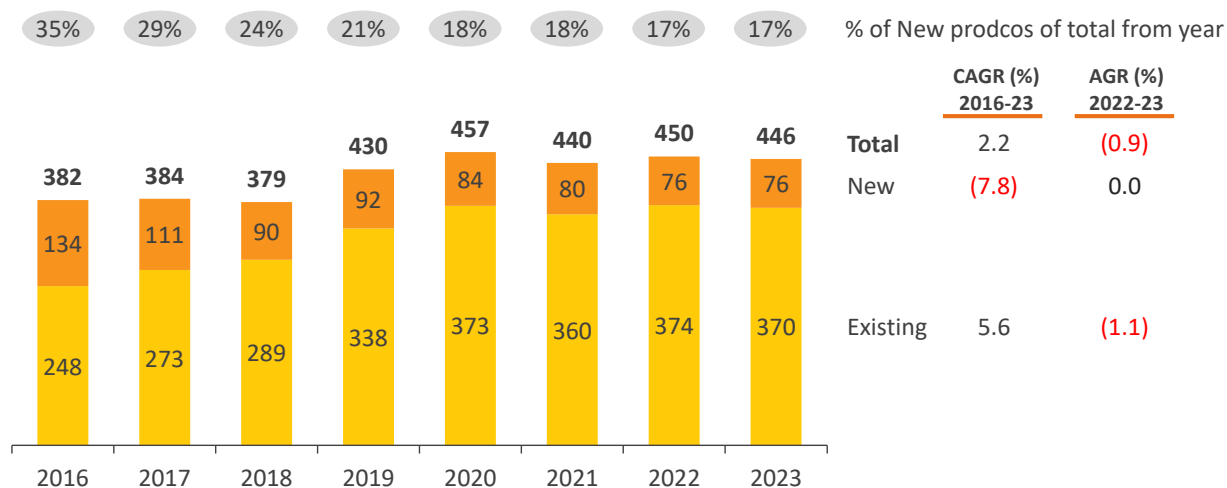
This is affecting well established small and medium-sized production companies, which are an important part of the production sector ecosystem.

Without a strong middle, the risk that industry will want to avoid is the cycle of creative renewal gradually breaking down – small and medium-sized producers would not be able to gain the necessary experience, reputation and investment to grow and access the higher value commissions in other genres. The risk threshold for investors would rise for small and medium-sized producers, leaving them to rely on existing ideas and returning series. Low-cost unscripted programmes are low margin with low secondary sales and little residual value. Pivoting to a new genre focus requires capital and hiring talent with existing experience and networks in the target market.

3.7 Fewer ‘new’ producers are being commissioned for the first time

Significantly fewer production companies are being commissioned to produce for the first time for the five main PSB channels, with the level declining each year, from 35 per cent in 2016 to 17 per cent in 2023 (Figure 9). This may reduce the opportunities for new talent and new voices to enter the sector, gain their first break and build experience.

Figure 9: Number of new production companies (excluding certain genres) per year, based on PSB main channel commissions



Note: Excludes companies who produce news, current affairs, sports, and film. Only includes companies who have been commissioned by main 5 PSB channels BBC1, BBC2, ITV, Channel 4 and Channel 5.

Source: O&O Producer Database, Oliver & Ohlbaum analysis

Interviewees also felt that commissioners were favouring larger, established production companies.

‘A lot of the broadcasters doubled down on their existing brands and companies. And so, there was no opportunity for companies that hadn’t worked with them or had been doing new stuff to get in the door’ – Nations based, female led, Factual Entertainment and Entertainment independent producer

This trend was also evidenced in the results of our producer survey; 91 per cent agreed that financial pressures on commissioners will lead them to favour larger production companies as they seek to reduce risk (Figure 10). Respondents in the Nations were slightly less worried about this than other groups, with 82 per cent agreeing, however this is still a high figure – showing concern across the sector.

Figure 10: Independent producers consider that commissioners will favour larger production companies over smaller ones, as they seek to reduce risk



Note: "To what extent do you agree with the statement that 'financial pressures on commissioners will lead them to favour larger production companies over smaller ones, as they seek to reduce risk'?" Those who answered 'Agree' and 'Strongly Agree'. Responses from 'All respondents' are in line with those in senior positions leading production companies

Source: SurveyMonkey (n=58, n=14, n=12), Oliver & Ohlbaum analysis

Interviewees highlighted how this has implications for diverse-led indies and, ultimately, the diversity of content being commissioned.

'As a working-class producer, we do not have the comfort or access that many of our competitors have. The percentage of working-class workers in the industry is only going to decline further as budgets get squeezed. This will adversely affect working class producers as they do not have the company reserves to weather this particular downturn in commissioning. We have found 'safety' in the larger, often less diverse, companies is attractive to broadcasters in the current market' – Nations based, Drama and Comedy independent producer

'There is very little investment around for smaller companies, it makes it so much harder to pivot, change and adapt to market conditions, which is why we are going to see small indies, particularly diverse led indies and indies in the Nations, going bust' – Nations based, independent producer

'When it's a slow market, when there's less money, people are naturally more risk averse, and that means that they're not going to take a bet on small indies. People are just less open to try new things. There's less money, there's less creative risk. That's why you see a lot of reboots. So when you're an indie that wants to offer new, original formats, original content, maybe new talent, that does tend to get squeezed out of consideration' – Regions based, diverse led, female led, Factual Entertainment and Factual independent producer

'Right now, the commissioners feel broadly thankful to get the viewings in, so they wrongly perceive the diverse led ideas as not being commercial enough. It makes it tricky for diverse indies, they're thinking about what to pitch, and then you end up diluting your output' – London based, diverse led, Drama and unscripted independent producer

3.8 This is therefore a critical moment for the industry

These trends, combined with the persisting commissioning slowdown, reveal the fragility of the ecosystem, with specialist genre and small and medium-sized producers particularly vulnerable, including across the Nations & Regions. These groups make up a large proportion of the sector by number of companies (over 40 per cent of

producers in 2023 were small producers with £1-£10 million/ year revenues; 27 per cent were medium-sized; over 20 per cent were niche genre specialists).

In our interviews, producers noted that the total number of production companies had increased in response to the rise in content investment around 2021, and that it is normal to see exits or consolidation in response to competition or in response to falling demand.

Many also highlighted how they are entrepreneurial and proactively looking for opportunities to adapt and diversify, including moving into adjacent genres and building partnerships with other producers or distributors, and moving into related areas such as virtual production, facilities and brand marketing for social media. The Appendix contains results from our survey on ways that producers are looking to adapt.

However, adapting and diversifying requires resources and investment to bring in new talent, train staff in new specialisms and to cover overheads while developing new business areas. Interviewees underlined that the current shift in commissioning strategy is fast. They expressed concerns that some independent producers with prospects will not have the chance to evolve naturally, especially as the change in commissioning comes on the back of wider economic shocks (the pandemic, the war in Ukraine). As a result, they commented that talent could be lost from the UK TV sector.

'Broadcasters are going to have a new strategy, but please ratchet it carefully so that you can take the industry with you. We're going to lose good people in the meantime; they could have transitioned if you would have just done it in a measured way. We will not see the great British television we've seen before, and then we'll stand back and say, 'Well, why is that?' – Nations based, Factual and Entertainment independent producer

Interviewees and survey respondents also found that commissioner communication and transparency around changing commissioning strategies was essential to enable them to pivot in a timely manner and to make decisions about running the business. They valued clarity on what the commissioner is looking for or moving away from; visibility on upcoming commissions so that the producer can make more informed decisions about hiring and retaining new talent; resolving delays in the commissioning process; communicating openly to reach those without existing relationships.

In our producer survey, only a small proportion of respondents believed that *PSB commissioning from smaller production companies* would improve, with just 8 per cent of all respondents agreeing. Similarly, expectations for improvement in *PSB commissioning from qualifying independent producers* was low, with only 12 per cent of all respondents expressing agreement.

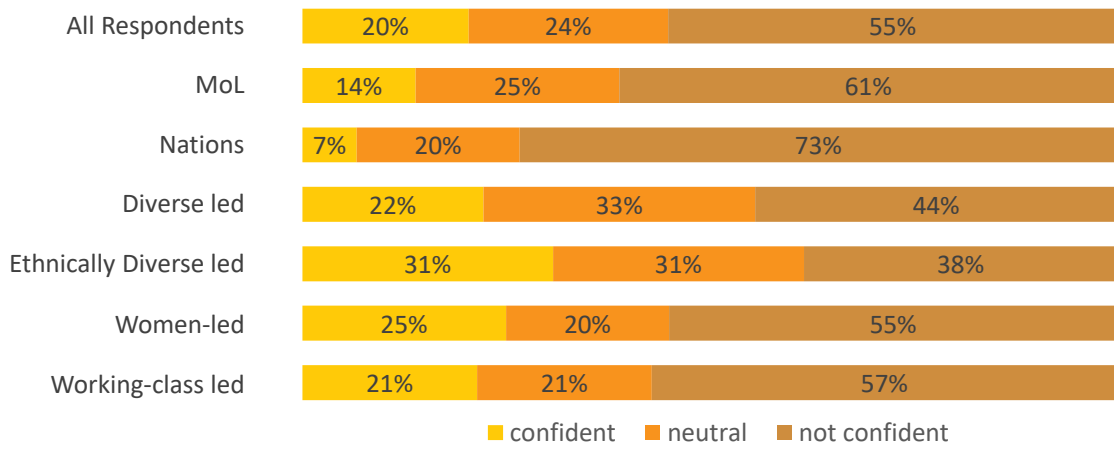
Meanwhile, 18 per cent of all respondents believed that *PSB commissioning in the Nations and Regions* would improve. Just under a quarter expected *PSB commissioning from production companies under diverse ownership* to improve, with 23 per cent of all respondents agreeing.

In another survey carried out in April 2024 by Indielab, 72 per cent of UK independent production companies felt that they would be at risk of closure if the current commissioning slowdown persisted, and 31.3 per cent of respondents had seen their permanent staff headcount decrease over the past 12 months.²⁰

Turning to the future, in our survey, 55 per cent of all respondents reported that they are not very confident or not confident at all about the prospects of their business – only 20 per cent were confident. Respondents in the Nations felt the least confident (73 per cent not confident; only 7 per cent said they felt confident).

²⁰ [Indielab Indie Voice Survey, 2024](#)

Figure 11: Most producers felt unconfident or uncertain about the prospects for their business



Note: Question: “How confident are you feeling about the future prospects for your business?” Responses from ‘All respondents’ are in line with those in senior positions leading production companies
Source: SurveyMonkey (n=74, n=36, n=15, n=18, n=13, n= 20, n=14), Oliver & Ohlbaum analysis

Further results from our survey are in the Appendix. The main takeaways include that a high level of respondents felt negatively about a range of factors in the current climate, with *the financial situation of small production companies* being the area of most concern at 85 per cent of all respondents, followed by *the ability to grow as a production company and to attract investment* at 77 per cent and *the ability to launch a new production company* at 68 per cent.

Diversity of off-screen talent
and crew could also be at risk

4 Diversity of off-screen talent and crew could also be at risk

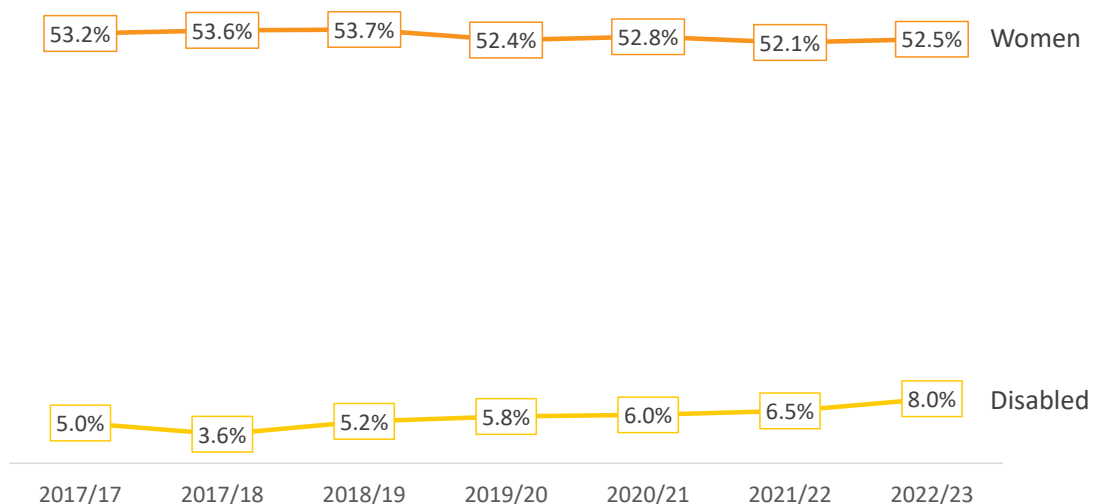
The diversity of off-screen talent and crew is vital to the mix and representativeness of content produced. In this part we explore the diversity of off-screen talent and crew working across different genres, providing a baseline against which to consider how diversity might be affected by a continuation of recent commissioning trends. We have used the term 'diversity' to refer to the demographic makeup of off-screen production talent and crew. We have focused on women, race and ethnicity and disability due to data availability from Diamond and current levels of inclusion.

4.1 Diamond reporting shows some progress in off-screen diversity, but there is further to go

Diamond (Diversity Analysis Monitoring Data) from the Creative Diversity Network is an end-to-end voluntary process for collecting and reporting diversity data from producers, covering everyone working on a production, both on- and off-screen.²¹

Diamond data shows that there has been mixed progress in off-screen diversity across underrepresented groups. At the headline level, the representation of women is in line with the census (51 per cent) and broadly stable. There has been an increase in disabled off-screen talent to 8 per cent in 2022/23, with further progress to go to reach the census level (18 per cent).

Figure 12: Off-screen contributions by women and by disabled people 2017/18 - 2022/23

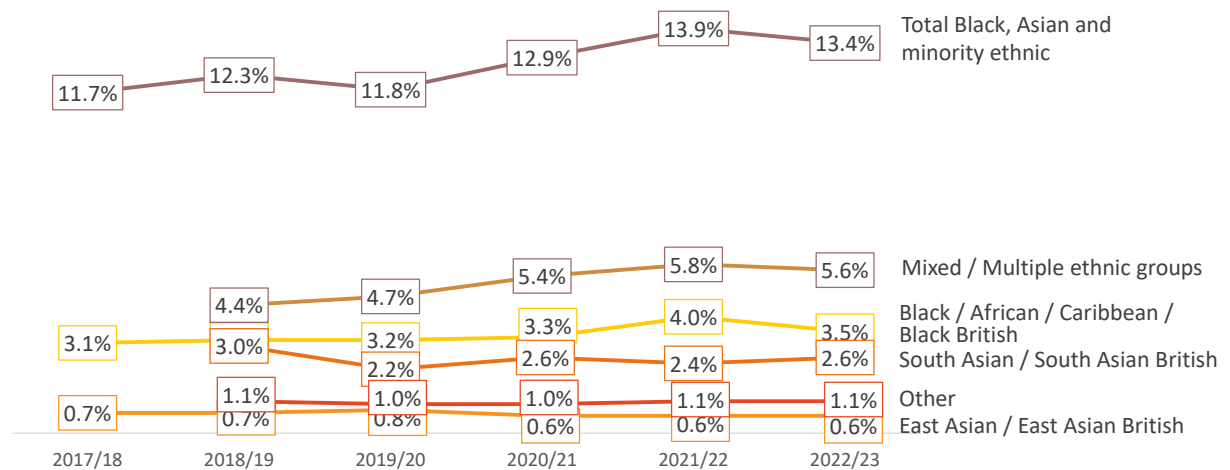


Source: *Diamond The Seventh Cut, Oliver & Ohlbaum analysis*

²¹ [Creative Diversity Network – Diamond](#)

The levels of off-screen contributions from people of Black, Asian and minority ethnic backgrounds have shown small increases in total over time, with variations between groups and further progress to be made considering census levels (18 per cent in total).

Figure 13: Off-screen contributions by people from Black, Asian and minority ethnic backgrounds 2017/18 - 2022/23



Source: *Diamond The Seventh Cut, Oliver & Ohlbaum analysis*

We have outlined different off-screen diversity metrics by different TV genres, using the publicly available data from Diamond.²² We have considered General Factual,²³ Specialist Factual,²⁴ Factual Entertainment, Entertainment, Drama and Comedy. Overall, Diamond data shows women's representation is near or above census levels in 2022/23 across the genres considered, from Specialist Factual and General Factual at 56 - 57 per cent to Comedy at 50 per cent. In some cases these represented a decline from 2019/20, notably in Drama (52 per cent, down 4.4 per cent from 2019/20) and Factual Entertainment (53 per cent, down 8.4 per cent from 2019/20).

Total Black, Asian, and Minority Ethnic representation has not yet reached the population census level in the genres analysed in 2022/23. Entertainment, at 16 per cent, and Drama, at 15 per cent, have the highest levels of representation. Comedy and Factual Entertainment are both at 14 per cent, while Specialist Factual is at 13 per cent and General Factual at 10 per cent. All of the genres made progress from 2019/20, except General Factual and Factual Entertainment, which saw declines of 7.3 per cent and 4.2 per cent respectively.

Drama, at 10 per cent, currently has the highest level of disabled representation, followed by Factual Entertainment and Entertainment (both at 9 per cent), Specialist Factual and Comedy (both at 8 per cent) and General Factual (7 per cent). Nonetheless, all genres recorded improvements from 2019/20.

The above data does not take account of seniority of role – overall, diverse groups are less represented in senior positions, women are less represented in technical and craft roles and directing. It also does not take account of peak or off-peak budgets or sub-genres. For example, Drama includes both continuing Dramas like soaps and high-

²² Further detail from the 2024 Diamond report is provided in the Appendix

²³ It should be noted that the genre breakdown provided by the Creative Diversity Network's Diamond report do not correlate exactly to those we have used in our forecast in Part 6 below, so the genre we refer to as 'General Factual', the Diamond report refers to as 'Lifestyle'

²⁴ It should be noted that the genre breakdown provided by the Creative Diversity Network's Diamond report do not correlate exactly to those we have used in our forecast in Part 6 below, so the genre we refer to as 'Specialist Factual', the Diamond report refers to as 'Factual'

end Drama; continuing Drama provides higher levels of representation. We must also note the question of intersectionality, as the same individual may be part of different groups.

4.2 The commissioning slowdown is putting pressure on progress

In our stakeholder survey and interview programme we asked companies about the diversity of off-screen talent and crew within their companies and the sector more broadly. We identified seven factors that contribute towards this diversity, and asked respondents how they felt about them, both in the market today, and how they feel they are likely to develop if the commissioning slowdown continues.

4.2.1 We assessed current sentiment and future expectations

Less than half of respondents were positive about factors that support diverse talent entering the industry, such as awareness of opportunities or ease of entry into the production sector today.

Across all respondents, 46 per cent were positive about *awareness of career opportunities for diverse talent*. 39 per cent of all respondents felt positive about *ease of entry into the industry for diverse talent and crew*. Turning to factors that support the retention of diverse talent and crew, around half of respondents were positive about *access to training for a diverse range of people*, at 52 per cent. All respondents were significantly less positive about *opportunities to progress for diverse talent and crew*, with 30 per cent expressing a favourable view. *Retention of diverse talent and crew* received the lowest overall ratings, with only 20 per cent of all respondents feeling positively about this factor.

Meanwhile, 46 per cent felt positive about *willingness to commission works by diverse writers or directors* and 43 per cent were positive about *willingness to commission works about diverse protagonists, stories or ideas*.

We also asked respondents how they think the seven diversity factors might change over the next five years if recent commissioning trends continue. Only 47 per cent of producers were positive about *awareness of career opportunities for diverse talent* over the next five years. 34 per cent of producers said they felt positive about *opportunities to progress for diverse talent and crew* and *retention of diverse talent and crew* in 5 years' time.

Overall, producers were less positive about commissioning behaviour over the next five years than they are today, with 38 per cent thinking *willingness to commission works by diverse writers or directors* will improve and 36 per cent thinking *willingness to commission works about diverse stories* will improve over the next five years.

In our interview programme, interviewees said that there has been a change in the type of content that commissioners are looking for. They noted that the fact that commissioners are generally more 'risk-averse' can have a particular impact on diverse stories and content from and about those from underrepresented backgrounds.

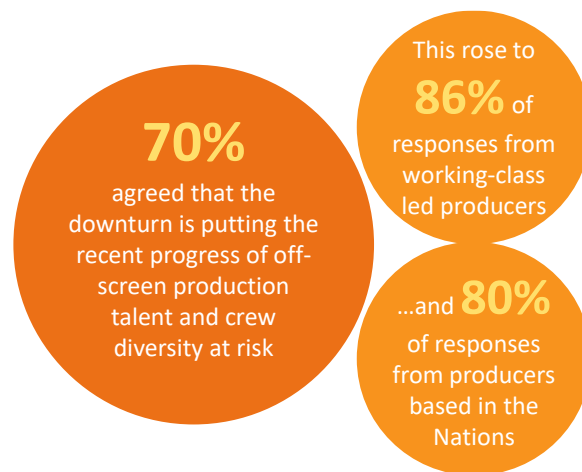
'The commissioners wrongly perceive the diverse led ideas aren't going to be commercial enough' – London based, diverse led, Drama and unscripted independent producer

'Broadcasters commission through their own cultural prism. There is a problem with diversity of supply... Diverse companies will not be considered 'blue chip enough' to win the rare commissions that will be the result of a reduction in commissioning spend and the slimming down of the genres. For years it's generally been that diverse companies were only seen fit to make content about subject matter that affected diverse people...' – London based, diverse led, multi-genre unscripted independent producer

4.2.2 Producers think that progress in off-screen diversity is at risk due to the slowdown

In our survey, 70 per cent of all respondents agreed or strongly agreed that lower overall commissioning spend and the change in the mix of genres being commissioned is putting at risk recent progress in the diversity of off-screen talent and crew. Working-class producers were the most likely to agree, at 86 per cent, followed by respondents based in the Nations, at 80 per cent. The level of agreement was high across all the different types of respondents, suggesting that there is generalised concern about future progress in diversity of production talent and crew, across the sector. This is likely related to the fact that long running, high volume and returning series are under pressure, which provide a large volume of opportunities for training new and developing talent.

Figure 14: A high proportion of producers agreed that commissioning trends are putting at risk progress in the diversity of off-screen talent and crew



Note: Question: "Based on the experiences of your company, to what extent do you agree with the statement that 'lower overall commissioning spend and the change in the mix of genres being commissioned is putting at risk recent progress in the diversity of production talent and crew'?" Those who answered 'Agree' and 'Strongly Agree' Responses from 'All respondents' are in line with those in senior positions leading production companies

Source: SurveyMonkey (n=53, n=13, n=14), Oliver & Ohlbaum analysis

Interviewees also felt progress made to date risked rolling backwards under economic pressure. This was a concern for different diverse groups, particularly for those with intersectionalities, and ultimately for the ability of programmes to reflect audiences across the UK.

'The result will be a non-sustained pipeline of diverse talent' – Industry body supporting freelancers

'I think it's because there's not the consistency of work. You may be able to get people in on their first job, but then it's the next job. It's the most important. Because if you can't offer them that, then there's only a limited amount of time they can stay in the market, to stay in industry' – Diverse led, London based, scripted comedy and drama independent producer

'The immediate impact of the downturn is to make it harder for production companies, particularly small ones, to take risks on staffing... Middle class people, even those with intersectionalities such as being middle class women, middle class black and brown people, middle class disabled people, will get through the hiring system first. The people that are much harder to get into the industry are those that don't come from middle class backgrounds. For those with intersectionalities it is even harder. It will be really tough for working class black, brown and disabled people, both those entering the industry and those who are already in the industry' – Nations based, independent producer

'I think socio-economic diversity is the biggest problem, because people from that background can't afford to join the industry... I think if you don't have a particular kind of education, particular kind of access, particularly background, I don't think you're always considered to have a seat at the table' – Regions based, diverse led, female led, Factual Entertainment and Factual independent producer

'The issue in Scotland is social and economic exclusion. That's the massive issue for us. I came from a council estate myself, and I don't see people like me coming into the industry now, not in sufficient numbers, and certainly not in proportion to the population. The people who will be most affected are people who don't have independent wealth and don't have the Bank of Mum and Dad to fall back on' – Scotland based, working class led, independent producer

'I think it may disproportionately affect women as well. It's always been very challenging for women [with families] working in this industry, but it probably is even more so at this point' – Scotland based, female led, high volume Factual independent producer

'I think there will be less new entrants into the sector from diverse and lower income backgrounds. There's not the job security to give new entrants the reassurance they need that they can build a career in the industry' – Regions based, female led, high volume Factual independent producer

This sentiment from interviewees is also reflected in research from Bectu - the UK's trade union for the creative industries. A summer 2024 Bectu survey of more than 2,300 film and TV workers from across the UK found that the proportion of BAME workers planning to leave the industry in the next five years remains higher than their white counterparts (37 per cent of white respondents compared with 44 per cent of Black/Black British respondents, 41 per cent of Asian/Asian British, and 40 per cent of respondents from mixed or multiple ethnic groups). 42 per cent of respondents who have a disability said they are planning to leave the industry, compared to 37 per cent of those who are not disabled.²⁵

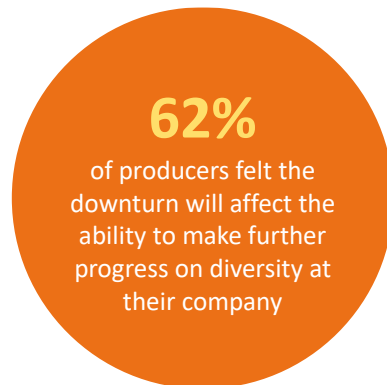
This research also found that that more than half (52 per cent) of the UK's film and TV workforce were still out of work following the SAG-AFTRA industrial action in 2023, with freelancers and those working in unscripted especially affected. Bectu found that 81 per cent of workers reported finding things more difficult financially than normal, given the fall in work, and that more than one in five (21 per cent) have had to take out a loan or unsecured debt. 24 per cent of workers said they were unable to pay all their household bills²⁶.

In response to our survey, 62 per cent of all respondents thought that lower overall commissioning spend and changing mix of genres commissioned will make it harder to make further progress on supporting diversity at their company. For unscripted producers, this rose to 75 per cent.

²⁵ Bectu, 'Half of UK screen industry workers remain out of work' <https://bectu.org.uk/news/half-of-uk-screen-industry-workers-remain-out-of-work-bectu-research-finds>

²⁶ Ibid.

Figure 15: Most producers agreed that lower overall commissioning spend will affect their ability to make further progress on diversity at their company



Note: Question: "How do you expect that lower overall commissioning spend and changing mix of genres commissioned will affect your ability to make further progress on Equality, Diversity and Inclusion (EDI) at your company?" Responses from 'All respondents' are in line with those in senior positions leading production companies

Source: SurveyMonkey (n=54), Oliver & Ohlbaum analysis

In our interviews, producers highlighted that tightened production budgets, scarcer commissions and falling revenues all put pressure on producers' capacity to incorporate and retain new staff, provide training and establish supportive structures.

A continuation of recent commissioning trends would affect the balance of the production sector

5 A continuation of recent commissioning trends would affect the balance of the production sector

In this part we set out an illustrative forecast for spend on original TV programming by commissioner type, based on a continuation of the trends seen in the last couple of years, followed by a deep dive for the five main PSB channels and VOD services across different genres and dayparts.

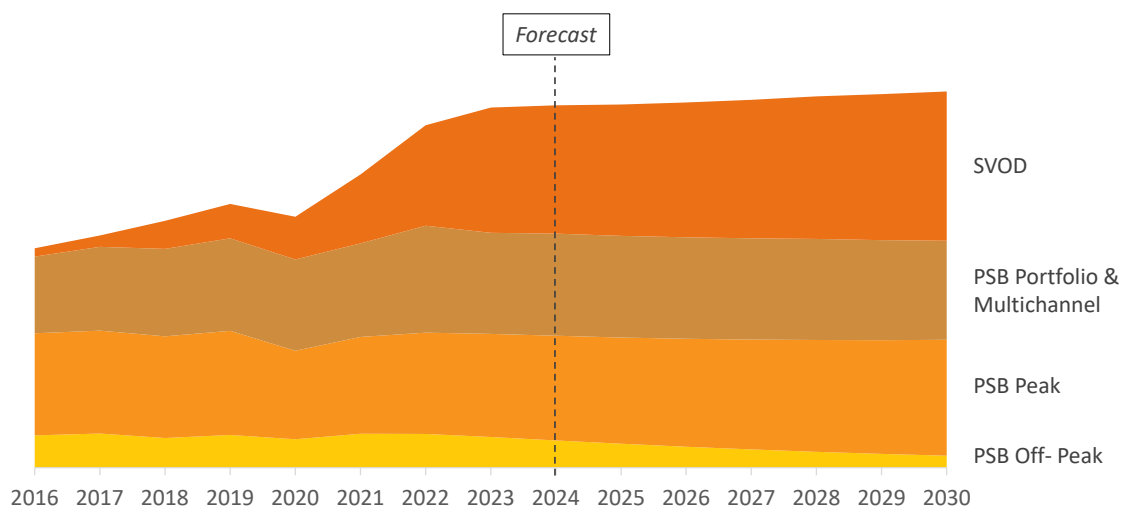
It is not a forecast of what we necessarily think will happen; it may be that we will get there over a longer timeline, or to a lesser extent. This provides a view of the direction of travel and the potential implications for the production sector in terms of the variety of production companies and for the diversity of off-screen production talent and crew. We then need to ask ourselves if this is the sector that we all want to see.

5.1 A broadcaster focus on peak time, and increased SVOD investment, could polarise commissioning spend

We started by looking at commissioning spend by the five main PSB channels, multichannel services and SVOD. **Figure 16** shows how this might develop, based on a continuation of recent trends (i.e. the post covid period), with total commissioning investment growing modestly from 2023 following a dramatic increase, mostly in SVOD spending.

In terms of the mix of commissioners, our illustrative forecast would see total spending for the five main PSB channels gradually decline, with share of spend lost from PSB off-peak to enable an increase in peak time. Multichannel spend would remain relatively stable, with a slight decline to 2030. SVOD investment would continue to grow, but more modestly than in recent years.

Figure 16: Total commissioning spend illustrative forecast 2016 - 2030



Note: Excludes news, current affairs, sports and film. Only includes main 5 PSB channels – BBC1, BBC2, ITV, Channel 4 and Channel 5. SVOD includes Apple, Amazon, Disney+, HBO Max, Hulu, Netflix and Paramount+. Multichannel includes Sky, UKTV and multichannel defined by Ampere as ‘Other’. Also includes BBC and commercial PSB portfolio channels. Only includes original programming for SVOD and Multichannel. Years refers to release dates.

Source: Oliver & Ohlbaum estimates, informed by O&O Producer database and Ampere Analysis

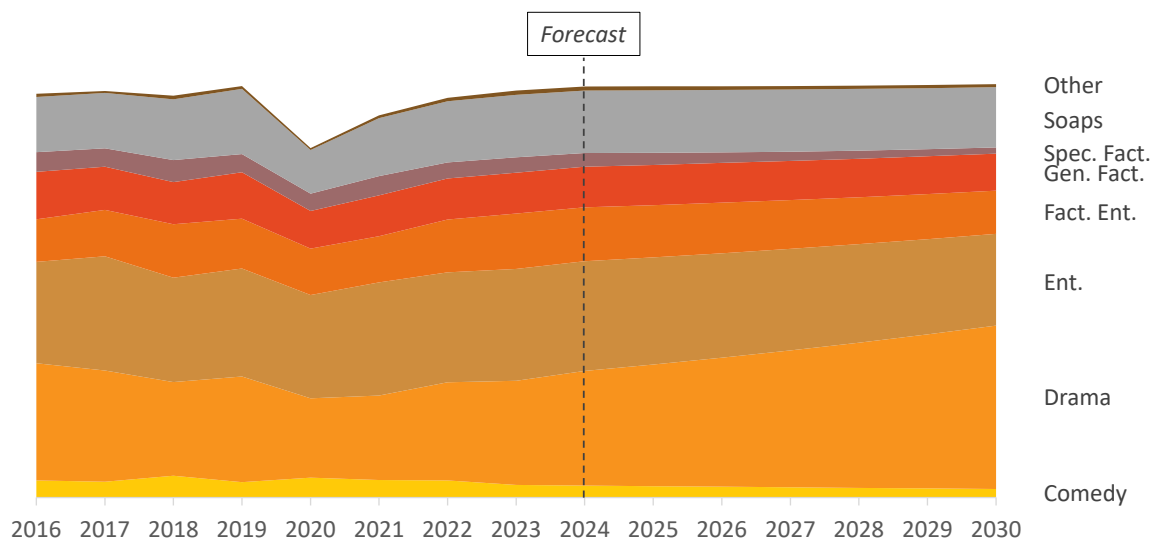
This would mean that the genres, and producers, typically commissioned for PSB peak time and SVOD services would see an increased share of spending. Those producing for PSB off-peak would be likely to be squeezed as well as those that have made PSB peak-time genres that would be deprioritised.

5.2 For PSB investment, this illustrative forecast would impact different genres in different ways

First, we take a closer look at potential developments in spending by the five main PSB channels in peak time. As shown in **Figure 17**, in our illustrative forecast, spending could continue its shift towards Drama, with total share reaching more than 40 per cent by 2030. This aligns with the recent strategies of ‘fewer, bigger, better’ programmes that can drive viewing and perform well on VOD.

Although they could still see modest growth in nominal terms, other genres would see their share of total peak spend shrink. This would affect peak Specialist Factual, Factual Entertainment, Entertainment and Comedy programming in particular. For Factual Entertainment, PSB would be likely to focus on marquee reality formats.

Figure 17: Total PSB five main channels spend illustrative forecast, peak time

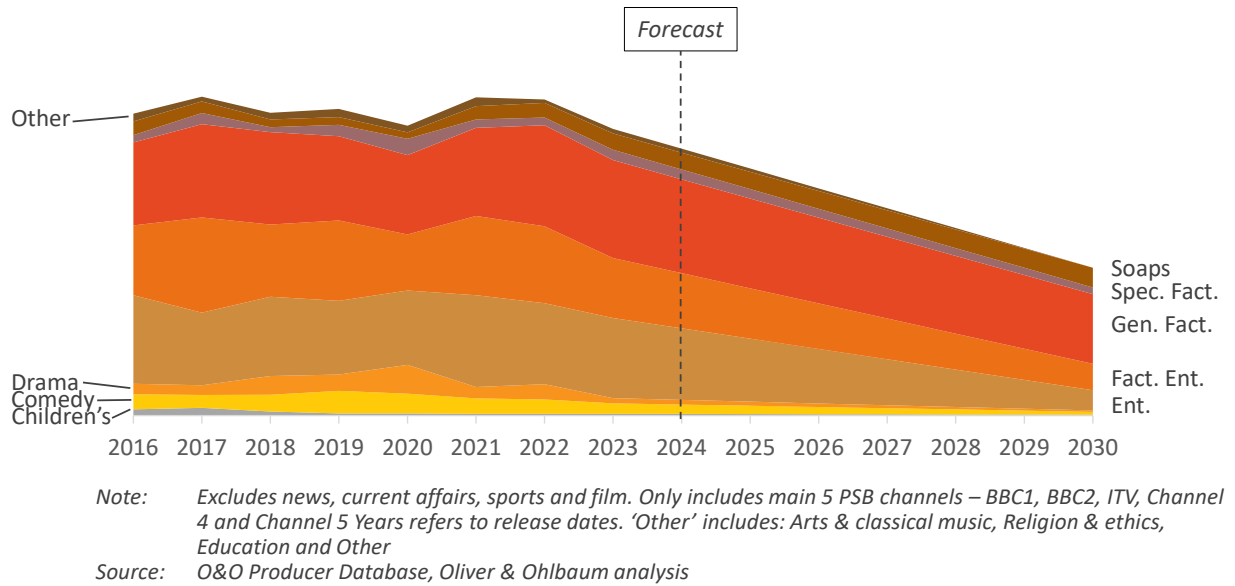


Note: Excludes news, current affairs, sports and film. Only includes main 5 PSB channels – BBC1, BBC2, ITV, Channel 4 and Channel 5 Years refers to release dates. ‘Other’ includes: Arts & classical music, Religion & ethics, Education and Other

Source: O&O Producer Database, Oliver & Ohlbaum analysis

Turning to off-peak, while the total spend on General Factual would decrease in our illustrative forecast, this would be to a lesser degree than other genres, meaning it could account for a greater share of PSB off-peak spend by 2030, with other genres losing both share and in absolute terms. General Factual includes lifestyle programming, which is thought to perform on linear as well as VOD. Investment in Factual Entertainment, which includes reality formats, would decline to a greater extent while remaining one of the stronger pillars of off-peak.

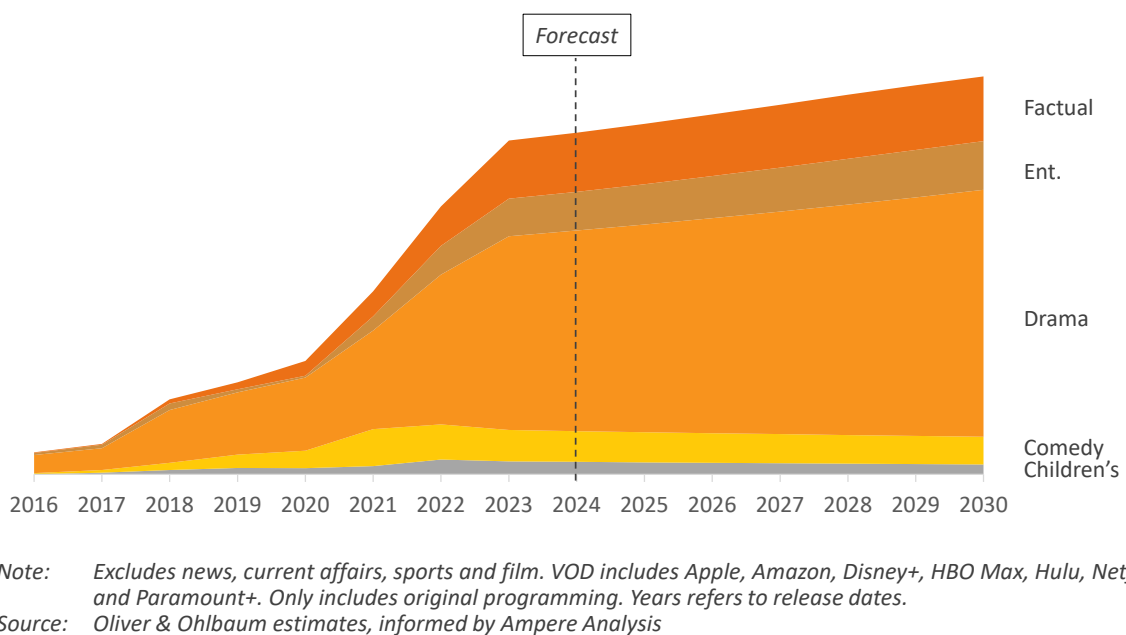
Figure 18: Total PSB five main channels spend illustrative forecast, off-peak



5.3 SVOD and multichannel spending would moderate

We have taken account of SVOD services' shift in focus towards profitability, resulting in more moderate growth in content investment. SVOD commissioning has always focused on a few core genres, notably high-end Drama to drive and retain subscriptions. For some SVOD services, commissions in a few other genres like Entertainment and high-end Factual have been used to broaden their offer and keep viewers engaged.

Figure 19: Total SVOD spend illustrative forecast



Therefore, our illustrative forecast would see Drama and Entertainment grow share of spending. Factual programming's share would hold steady. Meanwhile, genres such as Comedy and Children's would see their total spend decline and account for a smaller proportion of SVOD spend by 2030.

Multichannel spend is expected to remain relatively stable based on recent trends, with a very slight decline between 2023 and 2030. While multichannel services would maintain, and SVOD grow, their total spend on original commissioning, it is important to note that commissioning from these players is distinctive and complementary to PSB. They produce a relatively small number of programmes in a narrower range of genres than PSB and therefore work with fewer producers.

5.4 The genres that support the widest range of production company types could come under pressure

Below we indicate which genres would be least exposed to declining commissioning spend through to those that would be most exposed, in our illustrative scenario.²⁷ We then indicate to what extent these genres are important for supporting a variety of production companies, as identified in Part 2.

Table 1: Forecast impact on the variety of production companies

Genre	Main PSB channel day part	Illustrative spend forecast based on recent trends
Other ²⁸	Off-peak	<p>Most exposed</p> <p>Least exposed</p>
Comedy	Off-peak	
Entertainment	Off-peak	
Factual Entertainment	Off-peak	
Specialist Factual	Peak	
General Factual	Off-peak	
Drama	Off-peak	
Specialist Factual	Off-peak	
Other	Peak	
Comedy	Peak	
Factual Entertainment	Peak	
Entertainment	Peak	
General Factual	Peak	
Drama	Peak	

²⁷ Due to data availability on spend by genre, this includes BBC One, BBC Two, ITV, Channel 4, Channel 5. For SVOD services it includes Apple, Amazon Prime Video, Disney+, HBO Max, Hulu, Netflix, Paramount+.

²⁸ Other includes the niche genres Arts and Classical Music, Education and Religion and Ethics and Other

Overall, the developments in commissioning set out in our illustrative forecast would likely lead to a more homogenous production sector, with loss of variety in terms of producer size, location, genre specialism and ownership. Smaller, newer and more specialist producers could find it difficult to adapt and diversify quickly enough. That would risk innovative ideas and talent being lost from the sector.

5.4.1 Specialist Factual, Factual Entertainment and niche factual genres would be most threatened

In our illustrative forecast, the genres that would be most impacted by a continuation of recent trends in PSB spending are Specialist Factual, Factual Entertainment, the 'Other' niche factual genres, and Comedy.

However, Specialist Factual currently supports a relatively high variety of production companies in both peak and off-peak, notably small producers by revenue and new producers being commissioned for the first time by a main PSB channel.

For Factual Entertainment, while peak-time supports a moderate variety of producers, in our scenario there would be a focus on fewer, higher budget reality shows, meaning fewer commissioning opportunities. Off-peak Factual Entertainment includes lower budget, higher volume content such as docu-soaps and would see a more significant decrease in spend. This would impact small and qualifying independent producers that work in this genre.

In our illustrative forecast, 'Other' (arts and classical music, education and religion and ethics) would see the most significant decline in off-peak commissioning of all genres. While this supports a relatively low level of producer variety across our metrics, it does support a moderate level of small producers, which are reliant on daytime commissions. Peak-time spend would also decline, and involves a fairly high level of producer variety, especially small and qualifying independent producers and genre specialists.

Comedy investment is in long-term decline as scripted investment moves towards Drama and this would continue under our illustrative forecast. However, Comedy involves a fairly high level of small and qualifying independent producers and genre specialists.

5.4.2 General Factual and Entertainment programming would also be challenged

General Factual and Entertainment programming would also be challenged by changing commissioning patterns in our illustrative forecast. Each of these genres would decline at a higher annual rate than total PSB spend, with slight declines in peak and more significant declines in off-peak spend over the period to 2030.

General Factual programming encompasses a range of sub-genres such as consumer-affairs programmes, lifestyle programmes, daytime magazine and talk shows, and some forms of documentary not covered by Specialist Factual. PSB commissioning spend would slightly decrease for peak time spend in this genre, while off-peak spend would decline more significantly to 2030. Off-peak daytime commissioning is particularly important for this genre, so the greater drop for this daypart would have a knock-on impact for the variety of producers making General Factual programming.

Entertainment programming includes chat and variety shows, talent contests and quiz and game shows, alongside contemporary music. As with Factual Entertainment, peak programming in this genre is typically lower volume higher budget, while daytime and off-peak programming is higher volume. Consequently, off-peak Entertainment programming supports a higher variety of producers. Under the illustrative forecast, broadcasters would cut spending in both peak and off-peak Entertainment commissioning, although to a lesser degree for peak

programming. The much more significant drop in off-peak commissioning would therefore have an impact on the variety of producers, particularly for small and new producers.

5.4.3 Increases in Drama production would not sustain a variety of production company types

If recent trends continued, Drama would see the biggest increase in investment from PSB. However, this would not sustain the overall variety of the sector given the potential declines in other genres. There is a move towards high-end Drama, and this in particular tends to benefit large production companies and studios. Smaller or newer producers are often created to support a particular production and are led by established talent.

5.5 The illustrative forecast could also challenge off-screen diversity

We mapped our illustration of future commissioning investment to our assessment of the diversity of off-screen production talent and crew by genre, referring to Diamond data on the representation of women, Black, Asian and Ethnic Minority people and disabled people. Again, we have grouped the genres into those which are most threatened by declining commissioning spend through to those which are the least exposed, in our illustrative forecast.

Some of the key genres for supporting off-screen diversity would see declining spend, putting pressure on the potential for further progress and potentially on the levels of off-screen diversity seen today.

5.5.1 Declining spend in Factual Entertainment has implications for each of the diverse groups considered

Factual Entertainment supports a moderate level of diversity considering off-screen talent and crew that are women, Black, Asian and Ethnic Minority, or disabled. Off-peak in particular is high volume and lower budget, providing opportunities for new and underrepresented talent and crew to gain experience and progress. However, this would decline the most in our illustrative forecast.

While its rates of relative diversity are not yet as high, General Factual could also provide opportunities in future, especially for newer talent and crew in off-peak. However, investment would be challenged, with off-peak spend in particular declining in our forecast scenario.

5.5.2 The drop in Entertainment commissioning investment might have implications for future levels of Black, Asian and Minority Ethnic off-screen diversity

Entertainment spend is under pressure in our forecast, but today this genre supports a relatively high level of off-screen diversity in terms of race and ethnicity, according to the Diamond data discussed earlier. If such a drop in spending in Entertainment occurred, this could be a factor that affects existing levels of diversity and future progress.

5.5.3 Increases in Drama investment might not offset declines in other genres

Under our illustrative forecast, Drama would see increased investment from PSB (and sustained investment by other commissioners). According to Diamond it currently has relatively high levels of diversity across gender, race and ethnicity, and disability. However, we understand this is more prevalent in continuing and mid-budget Drama rather than high-end Drama, while spend is moving towards the latter. It also depends on the role, with diverse groups less represented at senior levels and, for example, women less represented in craft and technical roles.

Increased spend in high-end Drama might not be enough to offset declining spend in other genres that provide a high volume of content at lower budget levels and therefore greater ease of access and opportunities for training and inclusion. That said, Drama as a genre can make continued efforts to increase off-screen diversity.

5.5.4 And a continuing commissioning slowdown may have broader effects for off-screen diversity

Any retrenchment in total commissioning spend may put pressure on the progress made to date in off-screen diversity, given the overall commercial pressures on commissioners and the previously discussed trend for commissioners and investors to become more risk averse. This could have knock-on effects on commissioning from diverse-led independents and commissioning of diverse stories. Finally, we must underline that the levels of diversity are relative – comparing genre to genre. As discussed previously, there is still significant progress to be made on some diversity metrics as compared to the representation of different groups in the census, across all genres.

Conclusions

6 Conclusions

The production sector faces challenges from declining UK content investment and a changing commissioning mix, particularly due to the pressures on PSB revenues and public funding as well as strong competition between inward investors.

The Ofcom PSB Review, and Future of TV Distribution work and the upcoming BBC Charter review will shape the UK's PSB and wider broadcasting sector for the transition to IP – we must consider what this next phase looks like so that the UK AV ecosystem can thrive in an all-IP world.

The production sector is a core part of this – PSB programmes that are creative and high quality, reflect diverse audiences and stories from across the UK's Nations and Regions and reflect the UK to the world draw on diversity of supply from a varied, innovative and competitive production sector. PSB studios can refresh their IP and ways of working thanks to acquiring independents and attracting talent from the independent sector. And the production sector makes a significant contribution to the UK's creative economy, exports and attracting inward investment – which could otherwise move abroad as different countries compete to be the next AV hub.

6.1 The UK TV sector is a major success, but faces challenges

- The TV sector is going through a period of major change, with the entrance and growth of new AV services (SVOD, video sharing platforms) and changing viewing habits
- It has successfully navigated the disruption and emerged at a new equilibrium, with three major and complementary groups of commissioners: PSB (publicly and commercially funded), multichannel services, and SVOD services
- Throughout this period of change, the UK production sector has been resilient, growing steadily and retaining its position as a global leader
- Having seen a post-Covid bounce back, there is now a slowdown in commissioning and a shift in priorities as all commissioner types reassess their programme budgets and strategies

6.2 The variety and diversity of the production sector is one of its key strengths, but is at risk

- The sector consists of a wide variety of production company types with different characteristics in terms of size, ownership, genre specialism, and geographic location – and has been making progress in promoting off-screen diversity
- It is important to underline that this variety and diversity are key strengths, in that they support innovation and ensure commissioners and audiences benefit from a wealth of ideas, and content which represents audiences from across the UK. These are especially important to PSB in delivering their public service remits
- But recent pressures on commissioning budgets are not being felt evenly across all genres and day parts; and since different producers have different specialisms, certain groups of producers are most at risk
- If recent commissioning trends were to continue, we expect that genres currently supporting the greatest variety of producer types would be most at risk. This would also have implications for the diversity of off-screen talent and crew, exacerbating differences across genres

- A focus by commissioners on fewer commissions and a potential aversion to risk sees them more likely to favour larger and well-established providers, including for lower cost genres, which may impact diverse-led independents the most

6.3 Our analysis is supported by producer sentiment

- 91 per cent of producers agree that financial pressures on commissioners will lead them to favour larger production companies, rising to 100 per cent of responses from unscripted and working-class led producers
- Less than half, only 45 per cent, of producers are confident about the prospects of their business
- Producers based in the Nations feel most at risk. Only 27 per cent feel confident or very confident about the prospects for their business
- 70 per cent of survey respondents believe that lower overall commissioning spend and the change in the mix of genres is putting at risk recent progress in the diversity of off-screen production talent and crew. This rises to 86 per cent of working class led companies and 80 per cent of producers based in the Nations

Appendix

Appendix

6.4 Producers are concerned by recent trends

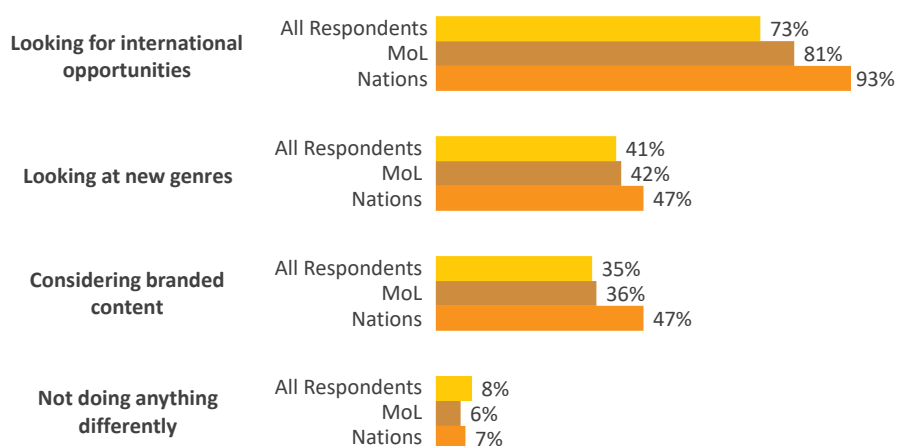
We conducted a stakeholder survey and interview programme to gather producers' views on and experiences of the commissioning slowdown and change in the mix of genres being commissioned, and how they expected to be affected if current trends continued over the next five years. This part looks more in depth at responses to certain questions about how producers are adapting to the slowdown, their assessment of the current picture and their assessment of the picture in five years' time.

6.4.1 Key findings from our survey and interviews show producers are looking to adapt to the slowing market

The first section of the survey covered market trends and respondents' experiences of the commissioning slowdown. It also asked for respondents' opinions on the future impact of the downturn on the health of the sector and the mix of different types of production companies it could support. We have provided analysis of the survey results by both the demographic characteristics of respondents, and by the genre/content type that they produce.

When asked what their companies were doing to adapt to the drop in commissioning, 73 per cent of all respondents said they are looking at international opportunities to adapt to the situation, making it the most explored option; it is not clear if there is sufficient international work to sustain the producers exploring this. This rises to 93 per cent of producers in the Nations. Nations-based respondents were also looking at new genres and branded content at higher levels than the average.

Figure 20: Producers are working to adapt, especially by looking for international opportunities

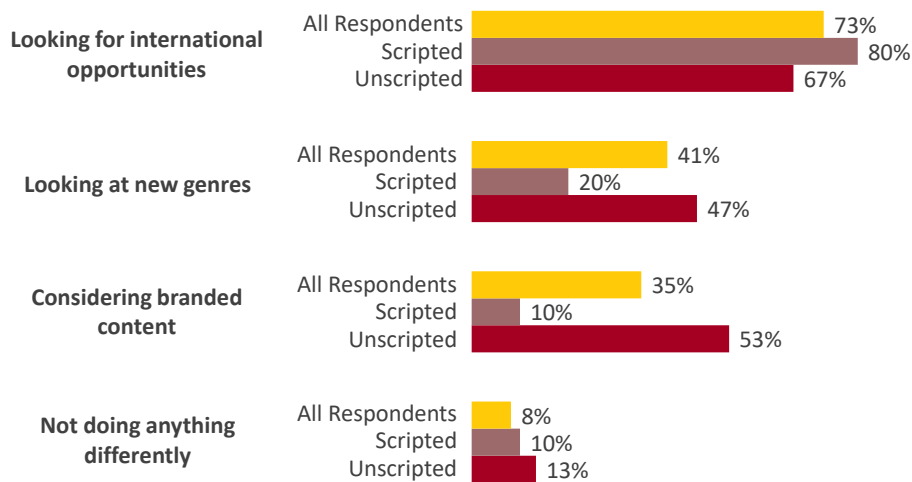


Note: Question: "After a post-pandemic boom, there has been an overall drop in commissioning spend and a change in the mix of genres being commissioned. What is your company doing to adapt to the situation?"
Source: SurveyMonkey (n=74, n=36, n=15), Oliver & Ohlbaum analysis

When looking at respondents' answers by content type/ genre specialism, unscripted respondents were particularly looking at new genres (47 per cent) and considering branded content (53 per cent). Meanwhile, scripted producers were particularly looking at international opportunities (80 per cent). Around 20 per cent of all respondents said they were looking at 'other options', which ranged from moving towards content for theatrical release, to diversifying into related areas such as masterclasses/teaching, to looking at independent or direct-to-audience

modes of distribution. Reducing overheads, focusing on digital and social media content, and raising own capital and attracting investment were also mentioned.

Figure 21: Scripted producers are especially interested in international opportunities while unscripted producers are especially interested in new genres and content types



Note: Question: "After a post-pandemic boom, there has been an overall drop in commissioning spend and a change in the mix of genres being commissioned. What is your company doing to adapt to the situation?"
Source: SurveyMonkey (n=74, n=20, n=15), Oliver & Ohlbaum analysis

In our interview programme, interviewees said that they were focused on adapting to changing commissioning trends. Some were considering how to move towards international opportunities, new commissioners and higher end content. Others were looking to diversity into adjacent genres; develop relationships with co-producers and international distributors; or into digital, particularly brand marketing for social media or exploiting their archive on social.

'The volume, low budget stuff, will just become incredibly competitive ... there's going to be a lot more people looking in the same space for this work. ...this is now a more crowded space; we've got to think as a small indie how much time is it really worth investing in that. Strategically, we are thinking of changing and going for that high end pond of content... [This also] opens up possibilities of discussions with streamers' – Regions based, factual genres independent producer

'We do have a partnership with a couple of entertainment producers at this point, so we're trying to break into that' – Scotland based, female led, high volume Factual independent producer

'Besides our TV business, we have just recently moved into virtual production, and we've made Ireland's first and the UK's first multi camera virtual production game show in Northern Ireland, which we intend to take into Studio Ulster, which is the new virtual production studio, the first in Europe' – Nations based, female led, Factual Entertainment and Entertainment independent producer

'We still make Comedy, but recently, we've switched into Drama as well, because making Comedy is more difficult to sustain during the downturn in international markets' – London based, diverse led, scripted Comedy and Drama independent producer

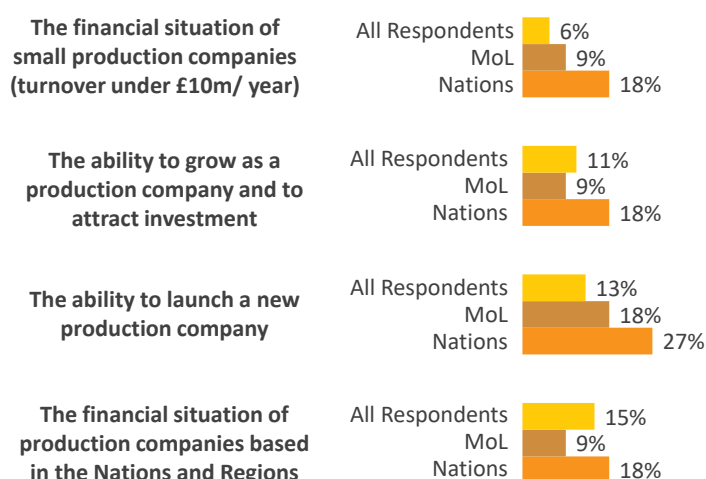
'Co-production is going to be one of our strategies moving forward... and a closeness to international distributors' – Scotland based, working class led, independent producer

'We've got to embrace digital even more than we have done. We've embraced doing our YouTube channels, we've got to embrace TikTok more' – London based, diverse led, Drama and unscripted independent producer

6.4.2 Producers are concerned about the current situation for small companies and the ability to grow and attract investment

We asked respondents about 12 factors that contribute to a healthy business environment and asked them how they felt about them in the market today. Of all these factors, only 6 per cent of all respondents felt positive about *'the financial situation of small productions companies (turnover under £10m/year)'*, followed by *'the ability to grow as a production company and to attract investment'* at 11 per cent and *'the ability to launch a new production company'* at 13 per cent. Respondents in the Nations were somewhat more positive, but this remained relatively low. This higher level of confidence might reflect the additional support available from screen agencies in the Nations and the additional possibility of winning some commissions from regional PSB services.

Figure 22: Few producers were positive about the financial situation of small producers or the ability to grow and attract investment



Note: Question: "We have identified factors which can indicate a healthy business environment. Based on your experience, how favourable do you think the following factors are in the market today?" Those who answered Positive or Very positive

Source: SurveyMonkey (n=52, n=26, n=11), Oliver & Ohlbaum analysis

When looking at respondents' answers by content type/ genre specialism, it is notable that 0 per cent of unscripted producers were positive about the about *'the financial situation of small productions companies (turnover under £10m/year)'* or *'the ability to grow as a production company and to attract investment'*.

In contrast, scripted producers were more positive, with 29 per cent feeling positive about *'the ability to grow as a production company and to attract investment'* and *'the ability to launch a new production company'*.

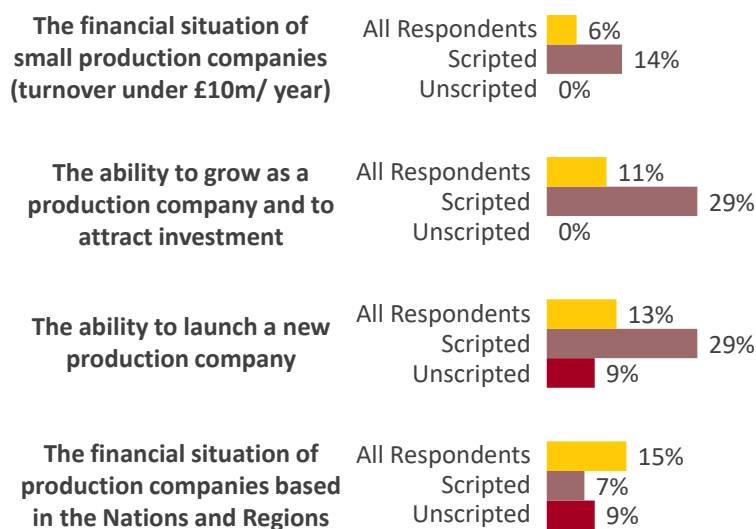
This was also borne out in our interviews:

'We would do a lot of work in the higher volume, lower tariff area. And we can see those margins being squeezed quite considerably. I know specialist programming companies are struggling because they have to get so many different funders involved. Only the companies with really deep pockets are able to finance both the cost of sale and the development' – Nations based, female led, Factual Entertainment and Entertainment independent producer

'I think if there was one change I would point to in the last five, six years, but particularly in the last two or three years, is that all the risk has been put onto the producer, whether that's cash-flowing productions, whether that's deferring fees, whether it's more demands from on screen talent, whether it's more demands from behind the scenes talent ... everything sits with the producer now. The broadcasters and streamers have put pressure downstream to the producers, and the talent are pushing it upstream to the producers, which is particularly hard for small companies' – Nations based, working class led, independent producer

Small and medium-sized producers underlined that because commissioners are more risk averse and there is greater competition for each commission, they are required to invest more in the initial pitch, developing a deck, a 'sizzle' video, sample script, hiring specific development staff. Smaller independents must match large independents, but the latter are able to spread the development costs for projects that they do not win across multiple projects. Traditionally, PSB commissioning was an opportunity for smaller independents to have more support with the development process. Interviewees explained that the pitches required for SVOD companies were even more detailed, 'effectively you are in pre-production before the idea has been bought'.

Figure 23: No unscripted producers said they felt positive about the financial situation of small companies or the ability to grow and attract investment



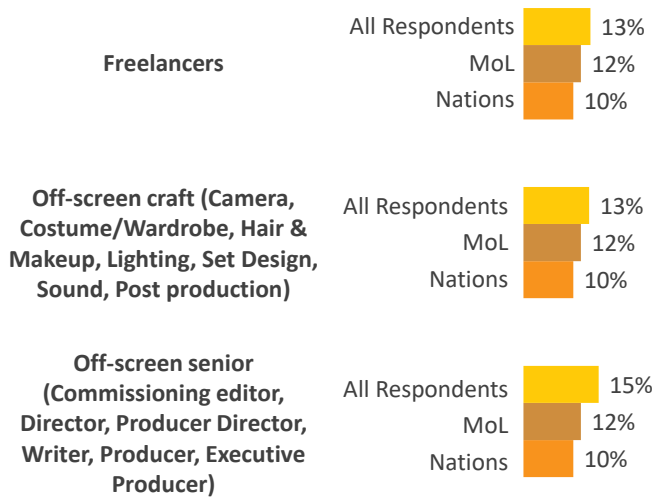
Note: Question: "We have identified factors which can indicate a healthy business environment. Based on your experience, how favourable do you think the following factors are in the market today?" Those who answered Positive or Very Positive

Source: SurveyMonkey (n=52, n=14, n=11), Oliver & Ohlbaum analysis

6.4.3 Respondents are also concerned about the impact of the downturn on talent and crew availability

Overall, respondents to the survey think the availability of freelancers will get worse over the next five years, if the downturn in commissioning continues. Only 13 per cent of all respondents thought that availability would improve. The picture is similar for the availability of off-screen craft and off-screen senior roles. Respondents in the Nations were somewhat less positive than the average.

Figure 24: Only a small share of producers think that the availability of freelancers and off-screen talent will improve over the next five years, and this is even lower in the Nations

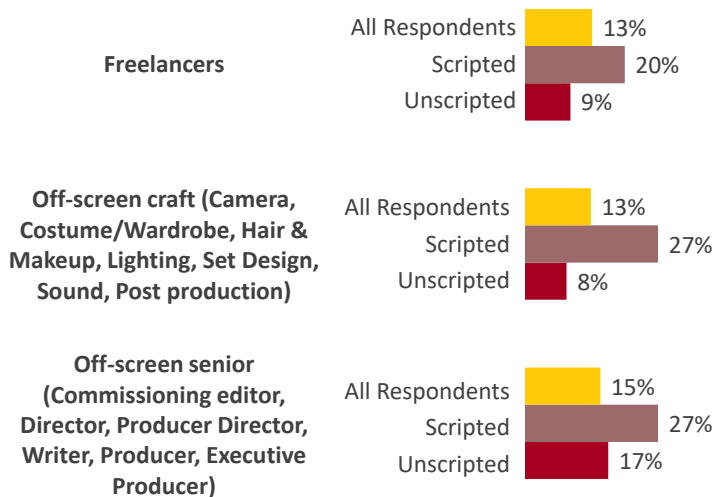


Note: Based on the experiences of your company, how do you expect the availability of talent / crew / skills will change over the next 5 years, if the downturn in commissioning continues? Those who answered Improve significantly or Improve slightly

Source: SurveyMonkey (n=52, n=26, n=10), Oliver & Ohlbaum analysis

When looking at responses to this question by type of programming, unscripted producers are the most concerned about talent and skills availability in the future, with only 9 per cent thinking the availability of freelancers will improve over the next 5 years and 8 per cent for off-screen craft roles.

Figure 25: An especially low share of unscripted producers think that the availability of freelancers and off-screen craft roles will improve over the next five years



Note: Based on the experiences of your company, how do you expect the availability of talent / crew / skills will change over the next 5 years, if the downturn in commissioning continues? Those who answered Improve significantly or Improve slightly

Source: SurveyMonkey (n=52, n=15, n=12), Oliver & Ohlbaum analysis

Our interviewees gave us further insights into the concerns over skills and freelance talent in particular:

'If the slowdown continues it's going to be much harder for freelancers to have long-term careers... more and more people are going to leave the industry' – Ultra-High End Drama independent producer

'People are trying to pivot to other media. But I think a lot of people are also finding that very difficult. Either they're overqualified or underqualified, they don't have the relevant experience in, let's say, social or digital platforms' – Industry body supporting freelancers

'I think what will happen as we see this severe kind of dissection in the market between [high budget low volume and high-volume low budget] is that the skill sets will get very divided. What you'll have is the people that work on volume shows as part of a big team. Then there'll be the high end, which is different. It's less people, but it's more bespoke, so those are two very different skill sets, and there will be less transferable skills' – Regions based, factual genres independent producer

'I think it's the middle ground; you're going to lose the middle ground of talent. We will lose quality of exec producers, story producers, editors. You'll get the niche high end, brilliant, the 'work all the time' strand of talent. And you get the low cost, volume, people that can do that well. I think it's the skillset of the mid-range shows that gets ripped out of the industry' – Nations based, Factual and Entertainment independent producer

'I think people with the transferable kind of skill sets will look at other sectors, people like production accountants... getting them will become tough' – London based, diverse led, scripted Comedy and Drama independent producer

6.5 Methodology

This section provides further information on the methodology for this report.

Market data analysis: We used the *O&O Producer Database* to collect data on PSB Network commissioning activity and assessed metrics including genre, location, size of producer and ownership status of producer. We then used desk research, including website searches of producers, studios and screen bodies, to collect additional data on SVOD commissions in 2023.

- **Literature review:** We used desk research to review previous reports on commissioning trends, audiovisual trends more broadly, diversity data and trends, and the latest policy developments. Sources included Ofcom, the Creative Diversity Network, screen bodies and academic research.
- **Stakeholder survey:** We designed a bespoke survey to gather producers' views on and experiences of the commissioning slowdown, how they expected to be affected if current trends continued over the next five years, and what this could mean for off-screen diversity.
- **Stakeholder interview programme:** We conducted an interview programme to gather deeper insights into areas covered by the survey. We also gathered recommendations from stakeholders on ways to support the industry through this period. We conducted interviews with 15 independent producers and the industry body representing freelancers, The TV Mindset. We included companies of different sizes and ownership types, across all nations and regions of the UK, working across different genres and for a mix of commissioners, including diverse-led companies.

6.5.1 A note on our market trends methodology

Our estimates are based on estimated spend from the *O&O Producer Database* (which covers BBC One, BBC Two, ITV1, Channel 4 and Channel 5), normalised back to known totals from Ofcom. We have excluded BBC portfolio channels from our analysis by subtracting historic data on BBC portfolio spend across different genres from Ofcom

spend totals. It should be noted that these BBC portfolio channels will have a smaller impact on overall trends due to their lower volume and lower spend on original output than the main channels. We have excluded news, current affairs, films and sport programming from our analysis as these genres tend to have more consistent spend and place in the broadcasting schedule and therefore are not the focus of our analysis.

Where we have provided estimated breakdowns of producer spending, for example by producer type, or producer turnover size these are based on estimated tariffs for each genre and daypart. This means that, assuming a stable level of editorial ambition within each sub-genre and thus a broadly stable cost, we can estimate how the change in commissioning habits has impacted different producer groups and genres.

When looking at the regionality of production, we have used Ofcom's PSB Annual Compliance Report as the basis for our estimations. The figures in this report cover all qualifying network productions, which excludes news and sports rights. These figures do include some non-event sport original programming and some original film content, making the totals for these charts slightly higher than our other charts which have a narrower genre definition, as outlined above. We have also removed BBC portfolio from this regional analysis. This method is broadly comparable with the reported regionality of output hours in Ofcom's PSB Annual Compliance Report; however, our numbers may not match up completely due to these reasons outlined above.

6.5.2 A note on our survey methodology and results

The survey included 50 questions in total, 12 of which were open questions that allowed respondents to give further insights or add nuances to their multiple-choice answers.

We shared the survey with a wide distribution list to ensure that the process was as inclusive as possible and that a mix of producer types had the opportunity to contribute. We collected responses from a range of active production companies, with 74 respondents completing the first section of the survey (on high level experiences of the current commissioning slowdown) and 54 respondents completing the entire survey.

93 per cent of respondents were from small producers with fewer than 50 employees. Further breakdowns are as follows:

- We had an almost even split of respondents based in London (52 per cent) compared with those based outside London (48 per cent).
- 20 per cent of our respondents were based in the Nations.
- 46 per cent of respondents had a diverse characteristic, either regarding race and ethnicity, sexual orientation or disability.
- 41 per cent of respondents were women.

In terms of the genre/ content specialism of respondents, 28 per cent made exclusively scripted content, 22 per cent made only unscripted content, 44 per cent made both types of content, and 6 per cent of respondents made content that did not align with these categories. It should be noted that in our charts we have chosen to look specifically at those who were just scripted or unscripted specialists.

6.6 Indicators for the variety of production companies by genre

The table below sets out the metrics and parameters used in our assessment.

Metric	High variety	Mid variety	Low variety
Mix of company sizes (by revenue)	c.50% or higher being small companies (<£10m turnover/year)	c.30-40% being small companies	20% or less being small companies
Location of production company (% based outside London)	c.40% or higher outside London	c.25-40% outside London	25% or less outside London
% which are QIs working in the genre	c.75-80% or more being QI	c.60-70% being QI	c.60% or under being QI
% of producers who are genre specialists	c.65% or more being genre specialists	c.40-60% being genre specialists	c.35-40% or less being genre specialists
% of producers working for the five main PSB channels / SVOD for the first time	c.10% or more being new companies	c.5-10% being new companies	c.5% or less being new companies

This table provides further detail on the variety of different production company types by genre.

Indicators of the mix and variety of production company types by commissioner and genre (2023)

Type		Relative variety of producer types (rounded)				
Buyer	Genre	% of small producers by revenue	Location (% Prod Co. outside of London)	Ownership (% of Q1 Prod. Co.)	Genre Specialism (% single genre producer)	% first time main PSB / SVOD ***
PSB (Peak)	GENERAL FACTUAL	60%	40%	80%	45%	25%
	ENTERTAINMENT	30%	20%	60%	40%	5%
	FACT ENT	40%	25%	70%	20%	10%
	DRAMA	40%	25%	65%	90%	15%
	SPECIALIST FACTUAL	50%	35%	70%	35%	10%
	COMEDY	40%	20%	60%	50%	5%
	OTHER	55%	15%	60%	50%	5%
PSB (Off-Peak)	GENERAL FACTUAL	50%	35%	75%	40%	10%
	ENT'MENT	25%	5%	60%	45%	10%
	FACT ENT	25%	20%	60%	20%	0%
	DRAMA	35%	10%	60%	75%	0%
	SPECIALIST FACTUAL	55%	35%	75%	40%	5%
	COMEDY	50%	10%	85%	60%	0%
	OTHER	45%	20%	55%	30%	0%

Note: *Small refers to companies with turnovers between £1-10 million**'All Other' includes all scripted and unscripted genres that are not drama commissioned by SVOD. This includes entertainment, factual entertainment, comedy, specialist factual, children's and general factual. The largest genre category within this group is entertainment (constituting entertainment and factual entertainment) *** In terms of SVOD services, 'new' companies refer to productions that have not had any commissions from any PSB or SVOD prior to 2023, as established from desk research

Ofcom follows a set of programme genre definitions, as outlined below and agreed with broadcasters in 2006.²⁹ Please note that 'Other' is a genre grouping we have developed for this report and it includes three small specialist genres: education, religion and ethics, and arts and classical music.

Genre	Definition	Programme examples
General Factual	<ul style="list-style-type: none"> • Consumer Affairs • Lifestyle content • Daytime magazine/talk shows • Other forms of documentary not covered under Specialist Factual 	<ul style="list-style-type: none"> • Loose Women • Gardeners' World
Specialist Factual	<ul style="list-style-type: none"> • Programmes about historical times or events • Natural history and programmes about environmental issues • Programmes about business/financial issues and developments • Programmes about scientific issues 	<ul style="list-style-type: none"> • Our Planet • Digging for Britain
Factual Entertainment	<ul style="list-style-type: none"> • Popular factual material, including reality shows, docu-soaps where the focus is on the subject matter or the human story / interpersonal Drama 	<ul style="list-style-type: none"> • MasterChef • Come Dine with Me
Entertainment	<ul style="list-style-type: none"> • All forms of entertainment programme, including panel games, chat & variety shows, talent contests • Contemporary music - coverage of popular music events and performances 	<ul style="list-style-type: none"> • The Chase • Strictly Come Dancing
Drama	<ul style="list-style-type: none"> • All Drama including Comedy Drama and TV movies but excluding soaps • Docu-drama - based on reality, telling the story of actual events 	<ul style="list-style-type: none"> • It's a Sin • Mr Bates vs The Post Office
Comedy	<ul style="list-style-type: none"> • All forms of scripted Comedy, satire, stand-up, and sketch shows • Situation Comedy 	<ul style="list-style-type: none"> • Fleabag • Have I Got News for You
Other	<ul style="list-style-type: none"> • This is a genre grouping O&O have developed for the purpose of this report that combines three small genres • Education programmes - usually backed by specially prepared literature publicised on screen • Religious and Ethics programming - coverage of religious acts of worship of all faiths, or exploring moral, ethical, spiritual issues • Arts & Classical Music - comment or critical appraisal of the arts, or presenting a cultural or artistic performance or event 	<ul style="list-style-type: none"> • Songs of Parise • The Piano

²⁹Ofcom: PSB Annual Research Report 2017 Annex Information pack: methodologies



O&O