Oliver & Ohlbaum

UK Television Production Survey

Financial Census 2025 – Nations & Regions Annex

July 2025

A report by Oliver & Ohlbaum Associates for Pact

Commissioning spend outside of London shrank to 48% of spend in 2024

After a period of sustained growth, the Nations & Regions' share of UK production activity declined in 2024, with Nations & Regions' share of primary commissioning spend, production budget, and direct employment all declining

Overall primary commissioning spend shrank slightly in 2024. Additionally, the share of spend on productions outside of London contracted slightly to 48% from 52% in 2023.

This decrease in share of spend was most pronounced in the English regions, which decreased from 32% to 28%, and Wales, which decreased from 13% to 5%. In contrast, Scotland's share of spend grew notably to 12% of total primary commissioning spend.

UK PSBs continued to account for over half of all commissioning spend outside of London, with the BBC alone accounting for 36% of commissioning value outside London as it continues to produce a significant share of its programming in the Nations & Regions.

Production budgets spent on commissions outside of London contracted to 49% of all production budgets spent in the UK.

Total direct full-time equivalent (FTE) employment in the UK production sector grew slightly in 2024, while the proportion of employment outside London declined to 36%.

Share of production budgets spent outside of London fell to 49%

- Scotland's share grew significantly, accounting for 17% of total spend, while investment in Wales and the English Regions declined

UK PSBs accounted for 68% of commissioning spend outside of London

- The BBC remained the largest PSB spender in the Nations & Regions
- International commissioner investment in the Nations & Regions declined, with their share of primary commissioning spend falling to 24%, a real-terms reduction of £112 million
- As per the scope of the Pact Census, which excludes producers wholly owned by the PSBs, out of London spending figures do not include in-house broadcaster spend (e.g. BBC Studios productions)

Direct full-time equivalent employment in the Nations & Regions grew by 4%

- This increase in employment across the Nations & Regions was partly driven by a modest rise in direct employment among producers included in the census, with the total number of individuals employed in the Nations rising slightly from 2023
- The share of people in full time employment who were based out of London declined to 38%, down from 39% in 2023
- The South West of England, North West of England, and Scotland were the largest individual employment locations outside of London

Methodology

The figures in this report are reflective of the total market; these are calculated by scaling up our financial survey data based on the current composition of the UK production sector

The Pact Census is conducted through a detailed financial survey of Pact members. Pact currently represents the majority of production companies active in the UK market.

The data from this survey is subsequently aggregated and scaled up in order to estimate the overall size of the market and specific sub-segments of activity.

Turnover band ranges are used to gross up sample responses to market size. Responses are placed into turnover bands, then totals within each band are scaled up based on known market composition (i.e. number of producers by turnover band).

The completeness of the Census is subject to the level of disclosure provided by participants. We reflect the revenues that are reported by participants in our figures.

Due to different company reporting periods, the annual Census returns include financial information spanning 2024 and 2025.

Sensitivity to sampling

Every year, new companies return our financial survey thus changing the make-up of our sample. This can cause slight variations in our year-on-year market values, though these small variations average out over time.

Regionality trends identified in the Census across multiple years provide an accurate indication of market developments, based on a broadly consistent survey sample, year-on-year.

Statistics should, however, be treated with caution when comparing individual years (especially where regions are broken out individually); this is due to the relatively small number of returns we receive from each individual region, and the variation in the companies providing returns between years.

This year, 103 complete responses were received, with 34 being from producers with their primary location out of London.

Scope of the Pact Census

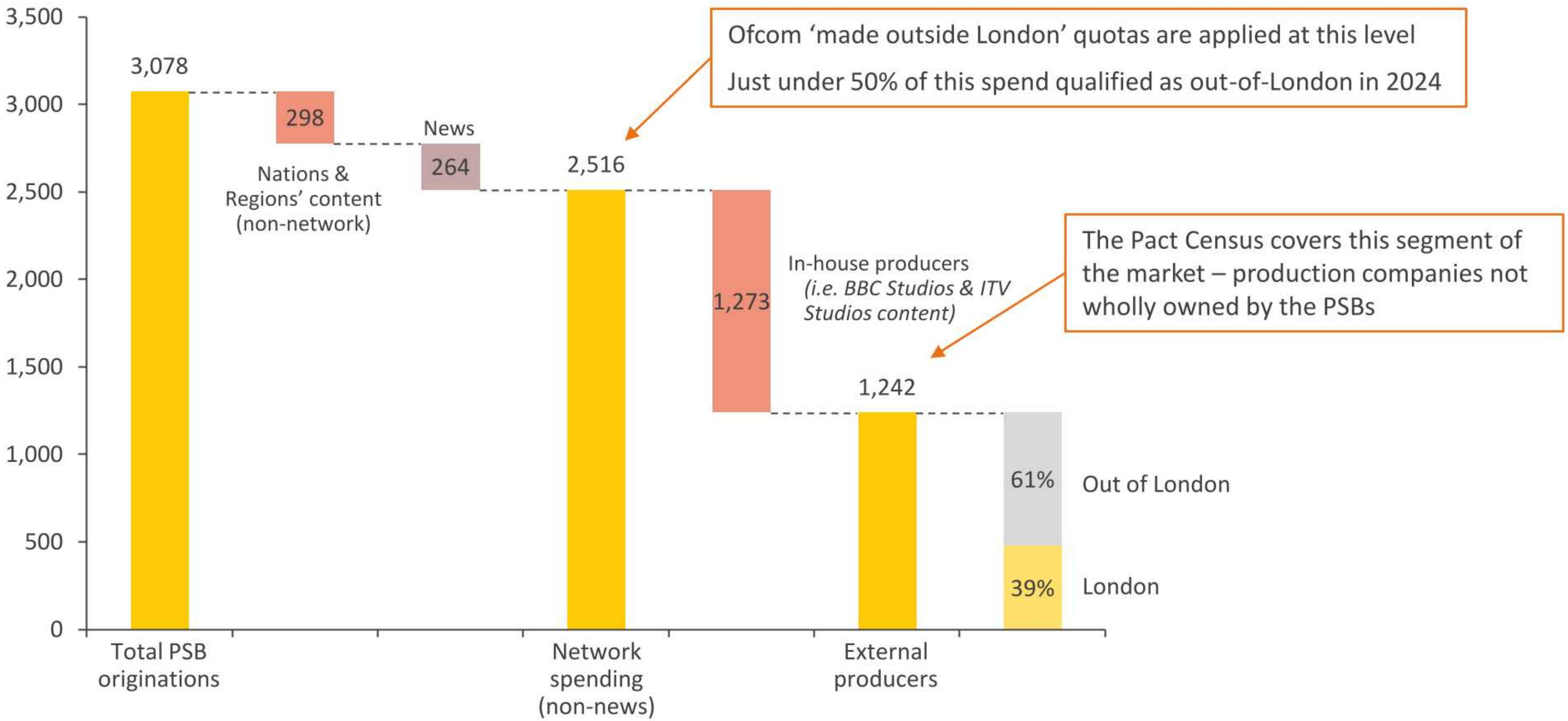
The Pact Census defines the ‘UK production sector’ as TV and film production companies in the UK excluding those companies wholly owned by PSBs. All references to producers and the production sector within this report follow this definition.

Regional classification in the Pact Census is based on the location of production. It should be noted that this is slightly different to Ofcom compliance reporting which is based on the ‘made outside London’ qualifying criteria.

N&R productions made up 61% of external PSB commissioning spend in 2024

PSB spending on productions outside of London remained over 60% of their total spend on external commissions in 2024

PSB commissioning spend (BBC1, BBC2, ITV1, Channel 4, Channel 5 and BBC portfolio) by category, 2024
£millions



Note: Network news and in-house producer spend has been estimated based on available information. 'Network' refers to content broadcast across the UK, whereas 'nations' and regions' content' is broadcast only in specific areas or regions

Source: Ofcom, Pact UK Television Production Census 2025, Oliver & Ohlbaum analysis

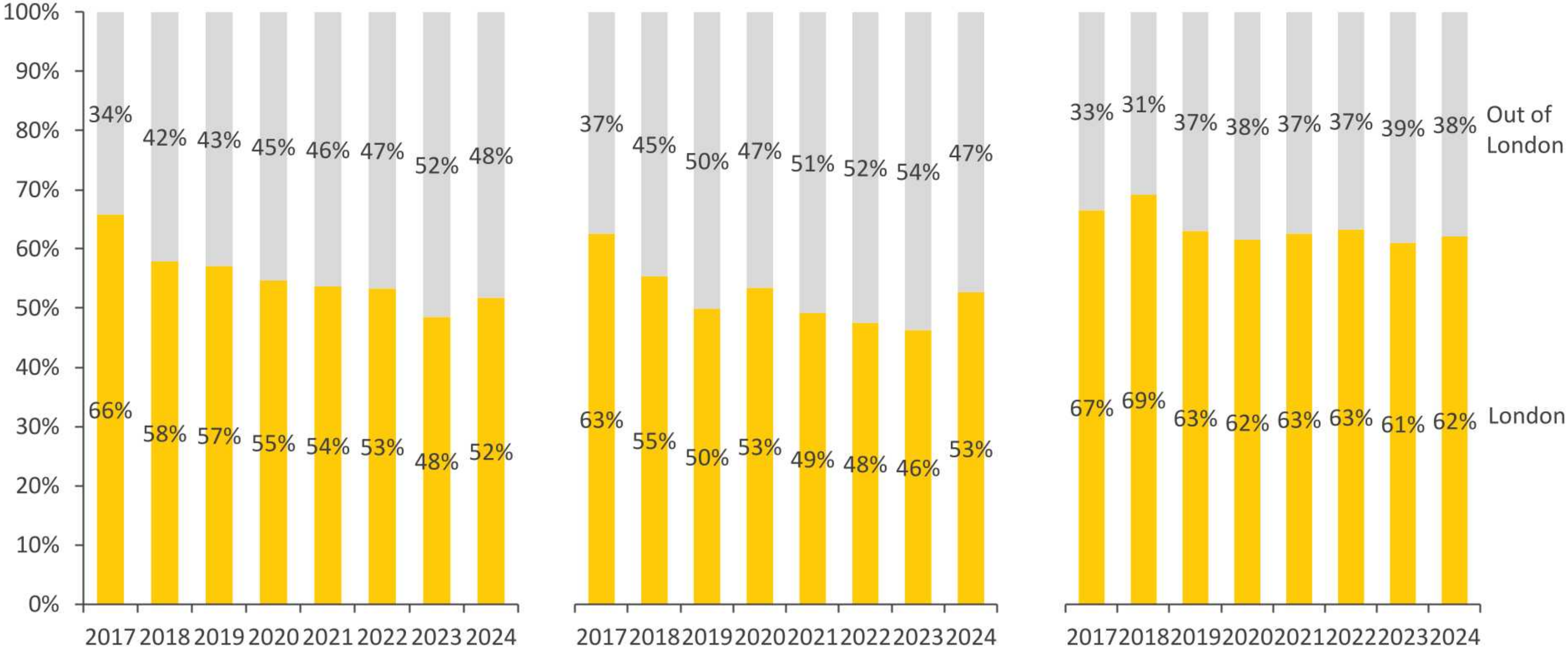
Nations & Regions trends 2017 – 2024

Since 2017, commissioners have spent an increasing proportion of their primary commissioning spend outside of London. Employment in the Nations & Regions has also followed this trend but to a lesser extent

Primary commission spend
% of primary commissions spend amongst producers included in the census

Production budget
% of production budget (UK) spend amongst producers included in the census

Direct employment
% of direct, full-time equivalent employment within producers included in the census



Source: Pact UK Television Production Census 2025, Oliver & Ohlbaum analysis

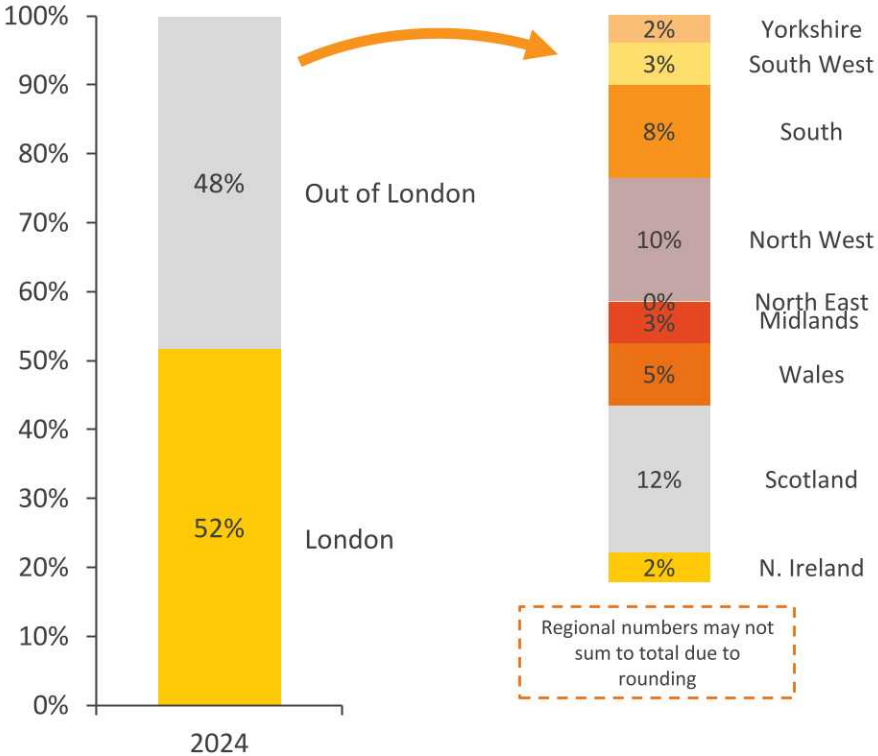
The Nations & Regions no longer has the largest share of primary rights spend

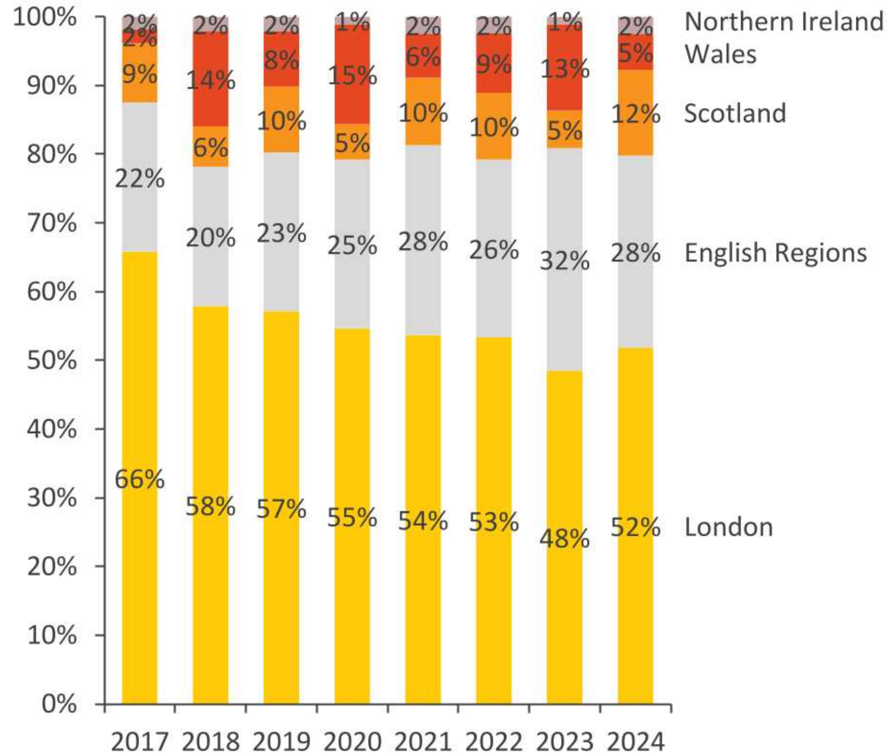
Spend on Nations & Regions productions decreased to below 50% of primary commissions spend. Scotland and Northern Ireland saw notable growth, whereas the English Regions and Wales experienced a decline in their share

Primary commission value by region of production, 2024 & 2017 – 2024

% of primary commissions spend amongst producers included in the census

Total primary rights for UK productions = £2.42 billion





Note: *Anglia/East England, at 0%, is not visible on the graph above. Overseas productions have been excluded.*
This page, and the following, cover all UK productions whereas page 28 only covers productions commissioned by the PSB channels

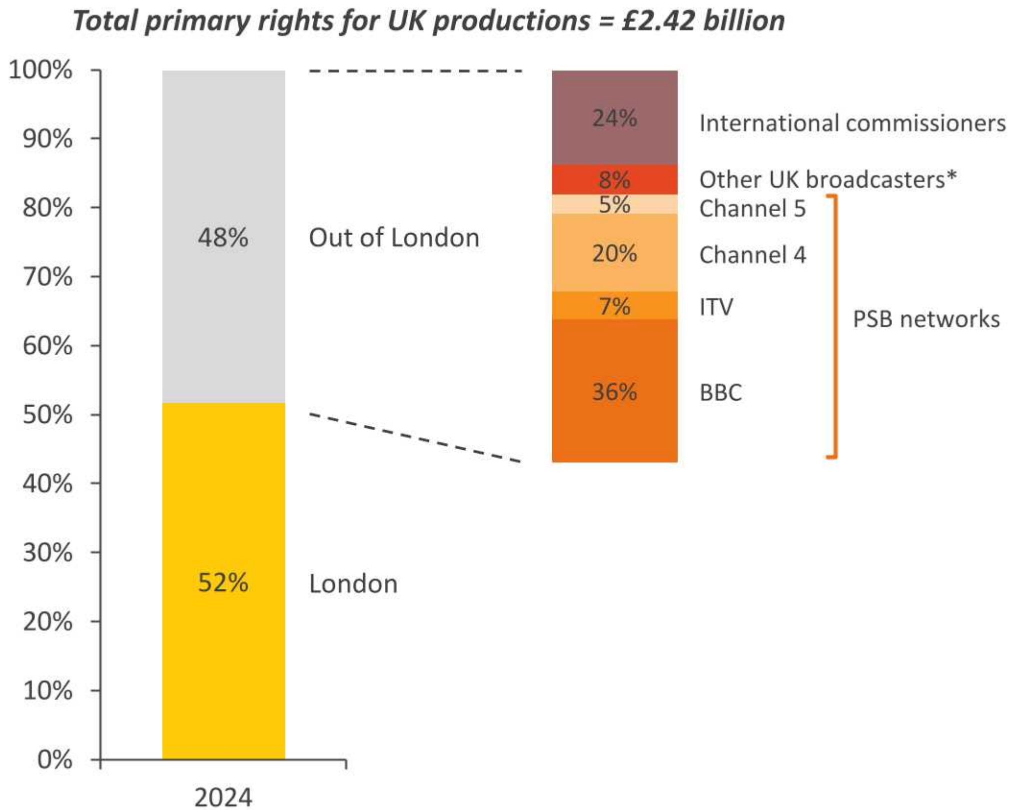
Source: *Pact UK Television Production Census 2025, Oliver & Ohlbaum analysis*

PSBs accounted for 68% of out of London primary commissions spend

International commissioners' share of programming produced outside of London declined to 24%. Share of revenue in the Nations & Regions derived from UK PSB networks grew to 68% in 2024

Out of London primary commission value by commissioner, 2024

% of primary commissions spend amongst producers included in the census



- Primary commissions produced in the Nations & Regions generated £1.16 billion of revenue in 2024, a slight decline of 5.0% from 2023
- This drop was mainly driven by a sharp fall in international commissioner spend in the Nations & Regions. In 2024, international commissions made up just 24% of primary commissions in the area, down from 32% in 2023. This is a real-terms decline of £112 million
- The share of Nations & Regions revenue from UK PSB network commissions rose from 57% in 2023 to 68% in 2024. In absolute terms, this was an £93 million increase, with total PSB revenues in the Nations & Regions reaching £796 million in 2024
- In order to meet quotas, the PSBs also spend a significant amount on in-house out of London productions. These statistics are not included in this Census

Note: *Overseas productions have been excluded*
**Other UK broadcasters refers to all UK non-PSB network channels and groups*
Source: *Pact UK Television Production Census 2025, Oliver & Ohlbaum analysis*

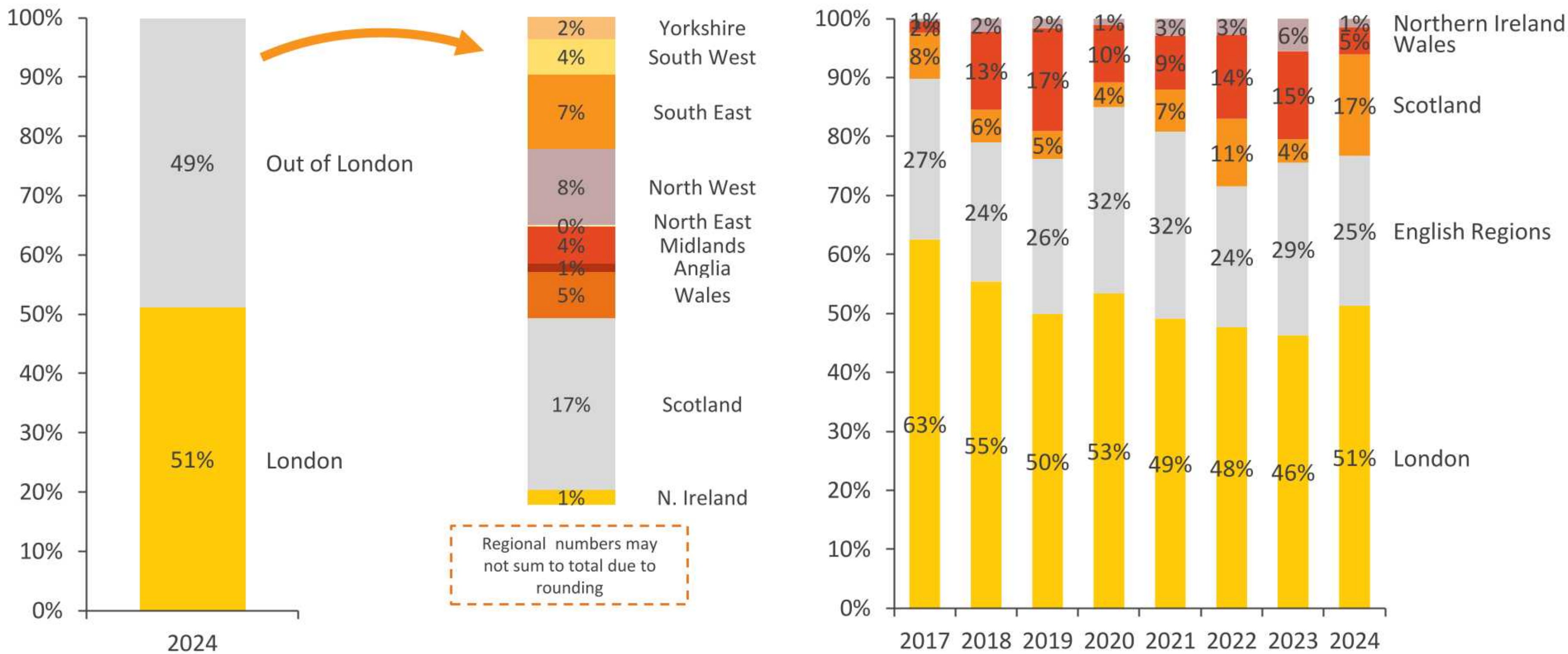
The share of production budgets for out of London declined to below 50%

Out of London's share of production budgets decreased to 49%, the first time it dropped below 50% since 2020. Both the Nations' and the English Regions' total shares were pushed slightly lower compared to 2023

Production budget by region of production, 2024 & 2017 – 2024

% of production budget (UK) spend amongst producers included in the census

Total budgets for UK productions = £3.88 billion



Note: *Overseas productions have been excluded.*
Fewer respondents provided production budget information so our sample is not consistent with the primary commission figures

Source: *Pact UK Television Production Census 2025, Oliver & Ohlbaum analysis*

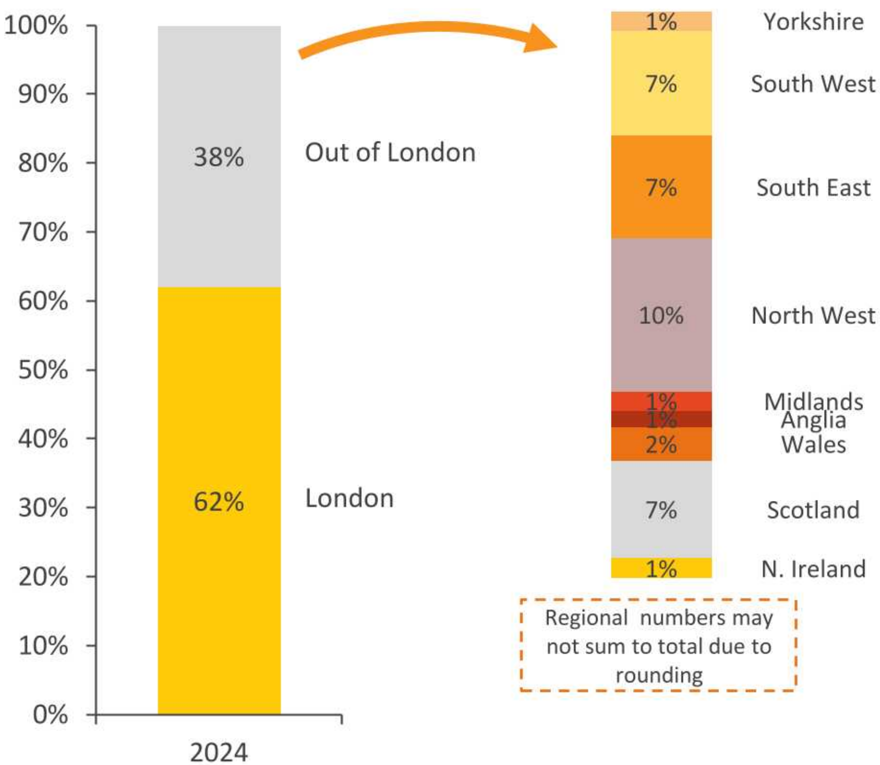
The proportion of employment outside of London remained stable in 2024

The share of employment held steady at 38% in 2024, compared to 39% in 2023. Just under three quarters of employment out of London was in the English Regions. There was real term growth in the Nations

Direct employment by region, 2024

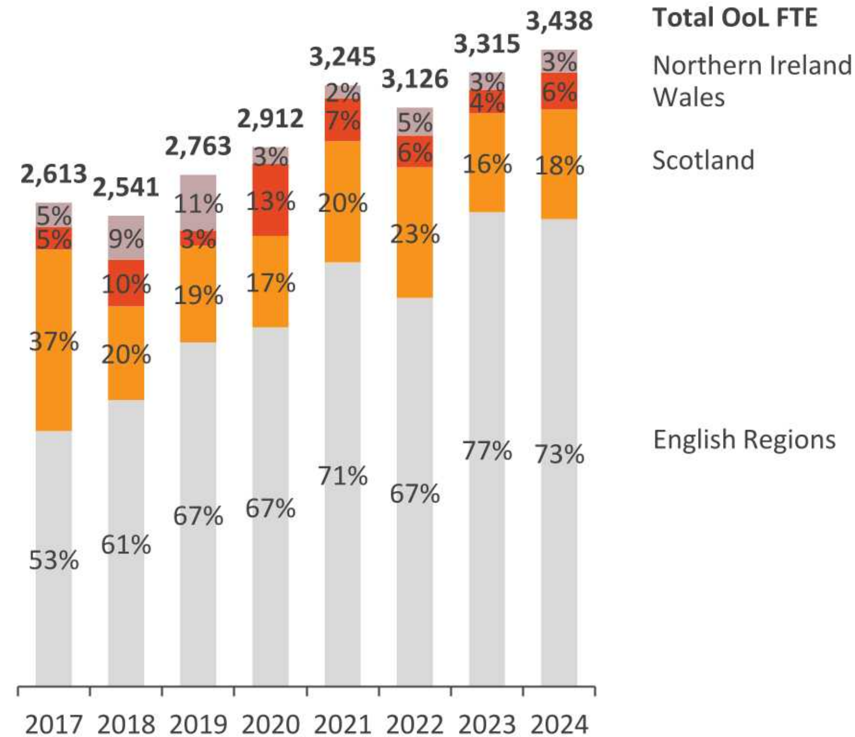
% of direct, full-time equivalent employment within producers included in the census

Total direct employment = 9,080 FTE*



Out of London employment by area, 2017 – 2024

and % of average direct, full-time equivalent employment



Note: *FTE = Full-time equivalent
Direct employment does not include freelance workers and total FTE represents an average across the year. Regional breakdown is particularly sensitive to differences in sampling between years. North East, at 0%, is not visible on the graph above.

Source: Pact UK Television Production Census 2025, Oliver & Ohlbaum analysis

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