



Oliver & Ohlbaum

UK Television Production Survey

Financial Census 2026 – Nations & Regions Annex

July 2026

A report by Oliver & Ohlbaum Associates for Pact

Commissioning spend outside of London returned to 52% of spend in 2025

The Nations & Regions' share of UK production activity partly recovered from its decline in 2024, with their share of commissioning spend growing. Their share of production budget and direct employment held steady

Overall primary commissioning spend grew slightly in 2025. Additionally, the share of spend on productions outside of London returned to its usual trajectory, equalling the previous record of 52% from 2023.

This rise in share of spend was strong in the English Regions, which increased from 28% to 30%, with a more pronounced increase in Scotland, from 12% to 16%. Within the English Regions, the South West saw a strong increase. Northern Ireland's and Wales's share of spend held steady.

UK PSBs accounted for over half of all commissioning spend outside of London, with the BBC alone accounting for 27%, as it continues to source a sizeable share of its original programming from the Nations & Regions, though its share has decreased from 36% in 2024.

Out of London productions made up 46% of total production budgets in the UK, representing a small decline from 2024.

Total direct full-time equivalent (FTE) employment in the UK production sector fell to its lowest level since the Covid-19 pandemic in 2025, while the proportion of employment outside London also declined minimally to 36%.

Share of production budgets spent outside of London fell to 46%

- Scotland maintained its 17% share of total spend from 2024, while investment in Wales continued to decline

UK PSBs accounted for 58% of commissioning spend outside of London

- Despite a contraction in investment, the BBC remained the largest PSB spender in the Nations & Regions
- International commissioner investment in the Nations & Regions grew in 2025, with their share of primary commissioning spend rising to 35%, a real-terms increase of £155 million, and a bounce back to their share in 2023
- 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 fell by 7%

- This decrease in employment mirrors total decline in employment, including London; the decline in the Nations & Regions was driven mainly by a fall in the English Regions, particularly in the South. Out of London employment was the full-time equivalent of 3,210, remaining above pre-pandemic levels
- The share of people in full time employment who were based out of London declined minimally to 36%, down from 38% in 2024 and 39% in 2023
- The South West of England, North West of England, and Scotland remained 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, 91 complete responses were received, with 28 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.

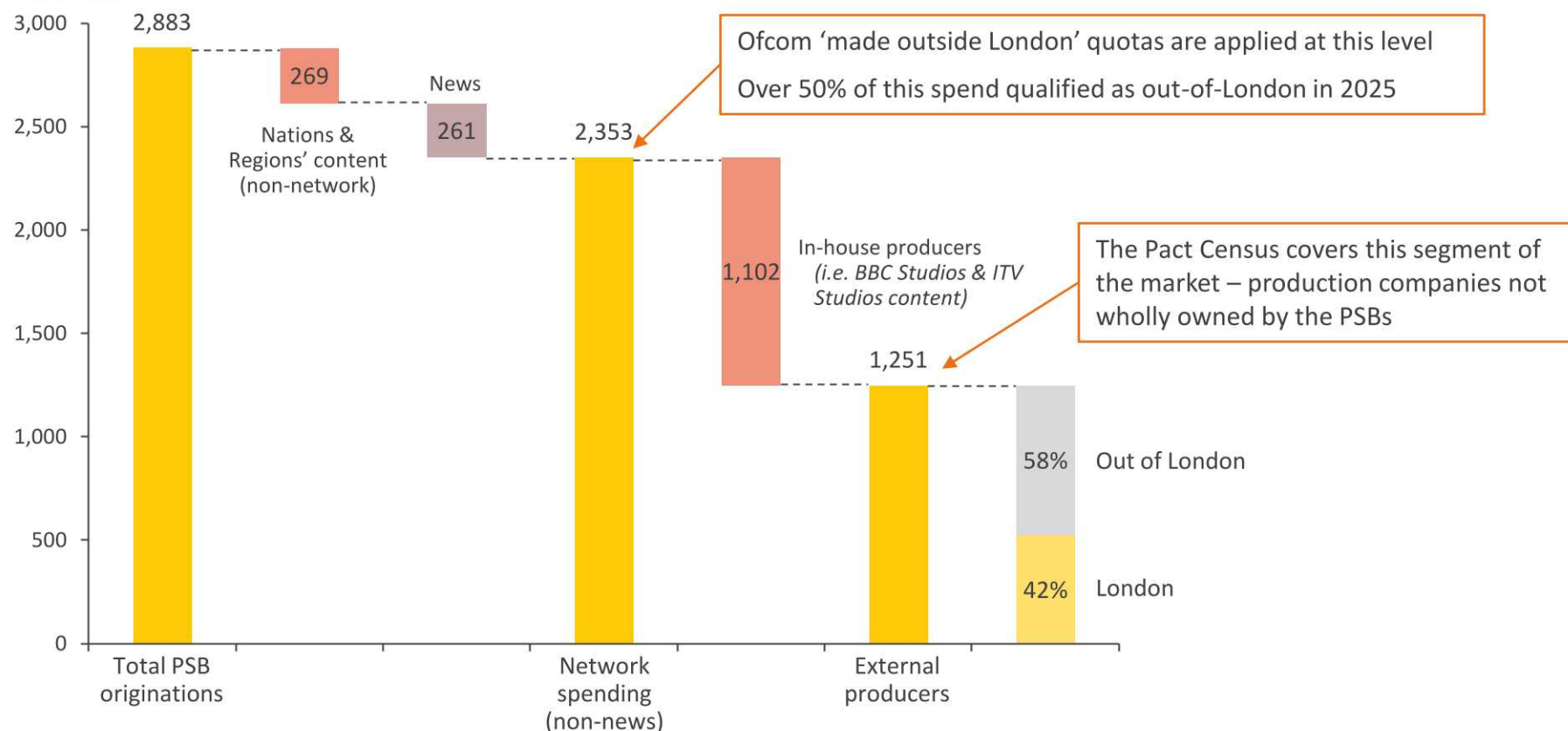
Regional classification in the Pact Census is based on the location of production. It should be noted that this is slightly different to Ofcom compliance reporting which is based on the 'made outside London' qualifying criteria.

N&R productions made up 58% of external PSB commissioning spend in 2025

PSB spending on productions outside of London dropped minimally to just under 60% of their total spend on external commissions in 2025

PSB commissioning spend (BBC1, BBC2, ITV1, Channel 4, Channel 5 and BBC portfolio) by category, 2025

£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

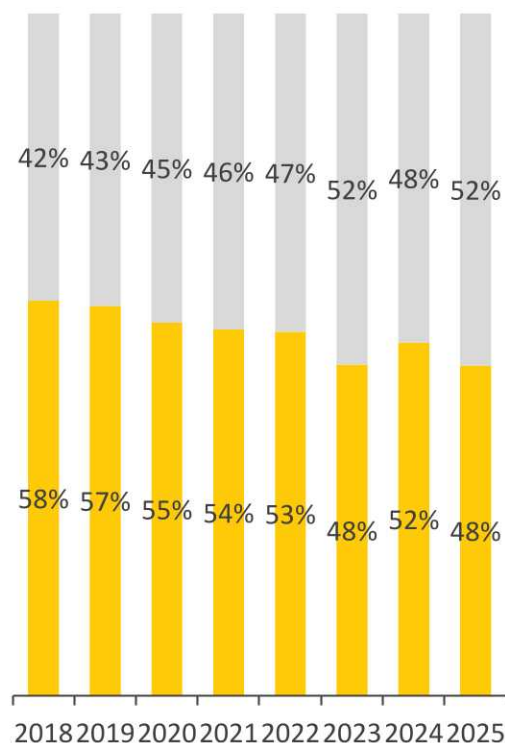
Source: Ofcom, Pact UK Television Production Census 2026, Oliver & Ohlbaum analysis

Nations & Regions trends 2018 – 2025

Since 2018, commissioners have spent an increasing proportion of their primary commissioning spend outside of London. Employment in the Nations & Regions has remained broadly consistent across the same period

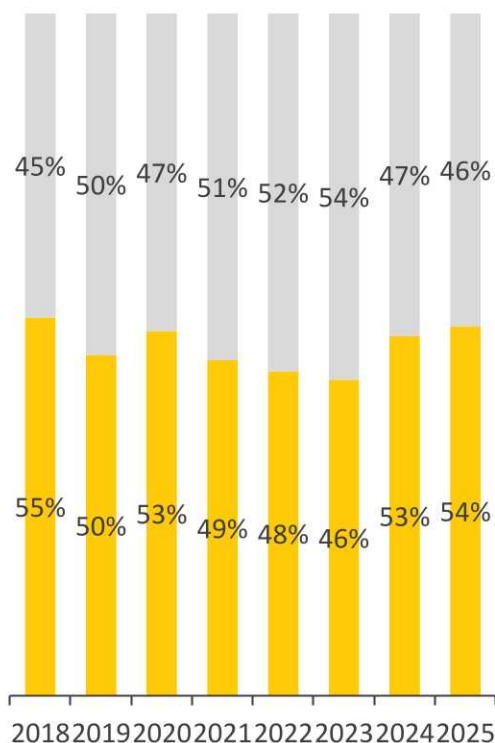
Primary commission spend

% of primary commissions spend amongst producers included in the census



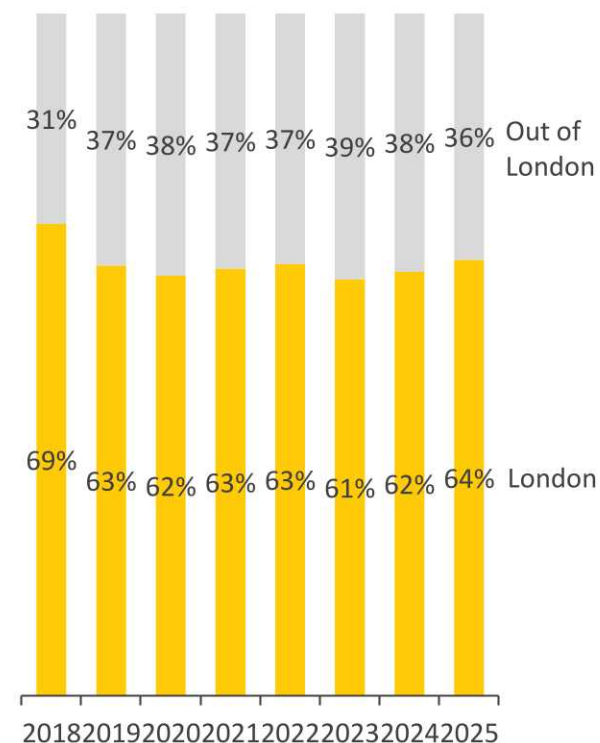
Production budget

% 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



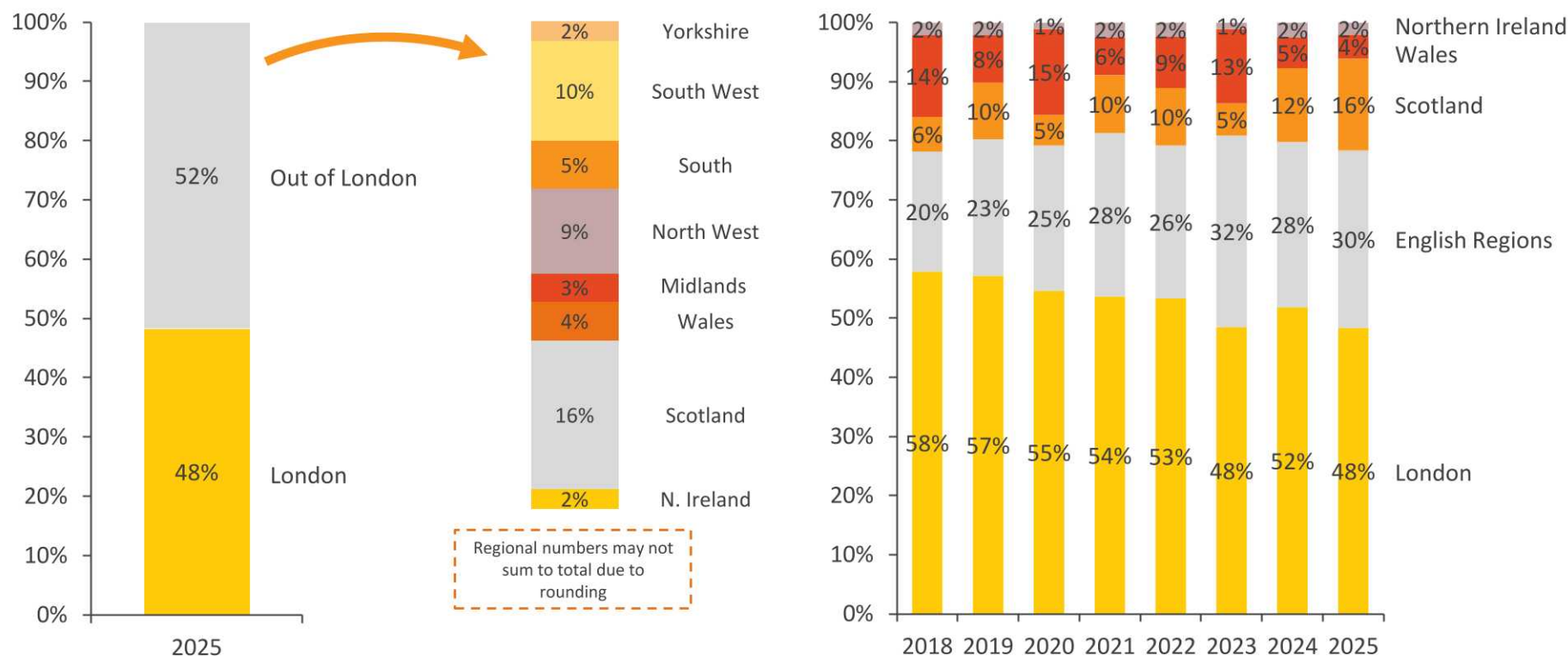
The Nations & Regions' share of primary rights spend rose back above 50%

Spend on Nations & Regions productions returned to above 50% of primary commissions spend, after falling to 48% last year. Scotland saw growth for the second consecutive year, with other regions remaining in line with 2024

Primary commission value by region of production, 2025 & 2018 – 2025

% of primary commissions spend amongst producers included in the census

Total primary rights for UK productions = £2.46 billion



Note: North East, at 0%, and Anglia, at 0%, are not visible on the graph above. Overseas productions have been excluded.

This page, and the following, cover all UK productions whereas page 4 only covers productions commissioned by the PSB channels

Source: Pact UK Television Production Census 2026, Oliver & Ohlbaum analysis

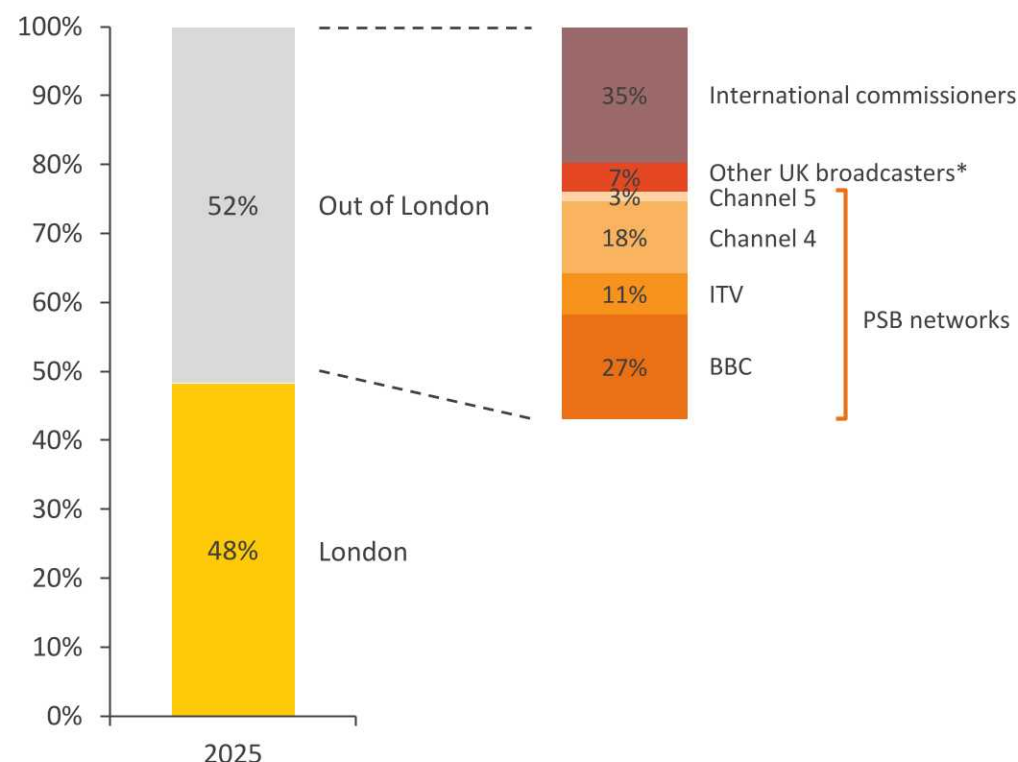
PSBs accounted for 58% of out of London primary commissions spend

International commissioners' share of programming produced outside of London increased to 35%. Share of revenue in the Nations & Regions derived from UK PSB networks fell to 58% in 2025, returning to pre-2024 levels

Out of London primary commission value by commissioner, 2025

% of primary commissions spend amongst producers included in the census

Total primary rights for UK productions = £2.43 billion



- Primary commissions produced in the Nations & Regions generated £1.25 billion of revenue in 2025, a slight increase of 7% from 2024
- This rise was mainly driven by a sharp increase in international commissioner spend in the Nations & Regions. In 2025, international commissions made up 35% of primary commissions, up from just 24% in 2024. This is a real-terms increase of £155 million, and is a return to 2022 and 2023 levels
- The share of Nations & Regions revenue from UK PSB network commissions fell slightly to 58%, returning to 2023 levels. In absolute terms, this was a £69 million decline, with total PSB revenues in the Nations & Regions still totaling £728 million in 2025
- 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 2026, Oliver & Ohlbaum analysis

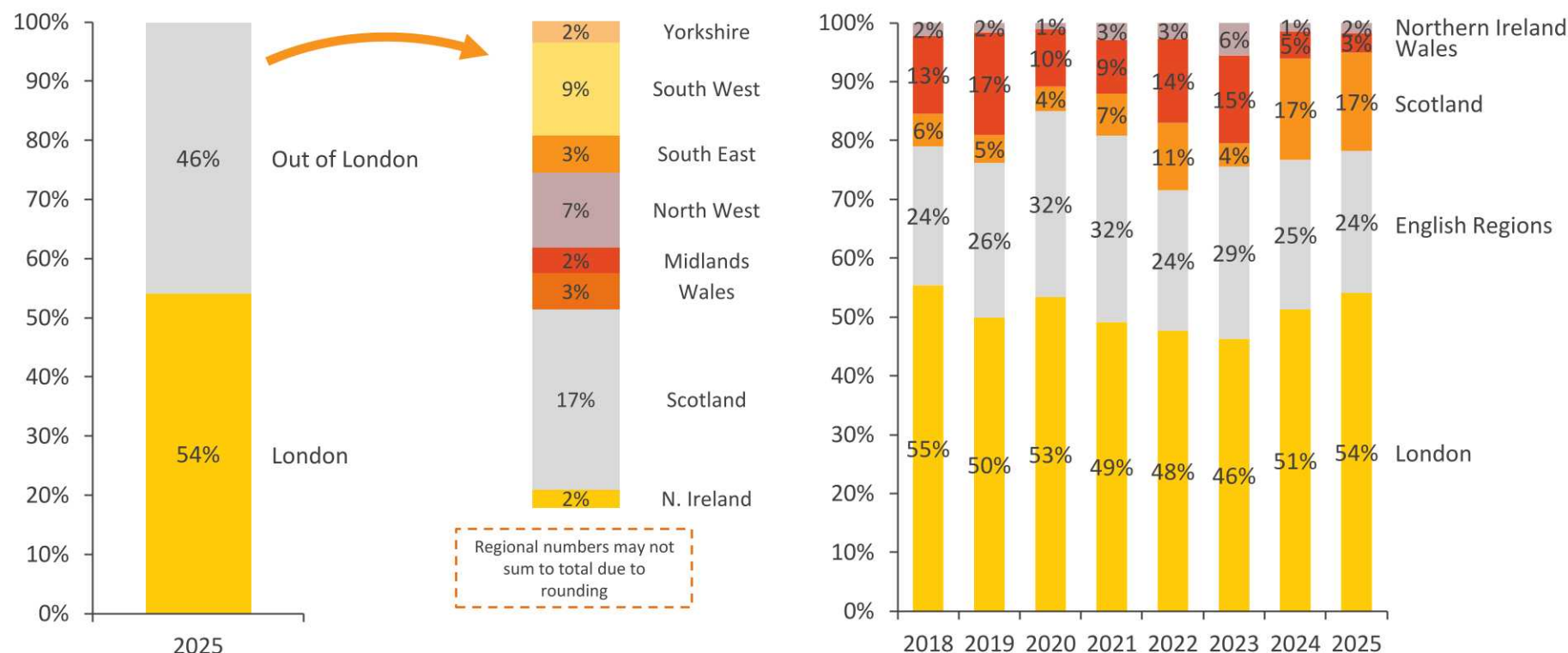
The share of production budgets for out of London remained below 50%

Out of London's share of production budgets was 46% in 2025, marginally declining from 49% in 2024. London's share grew to its highest level since 2018

Production budget by region of production, 2025 & 2018 – 2025

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

Total budgets for UK productions = £4.00 billion



Note: North East, at 0%, and Anglia, at 0%, are not visible on the graph above. 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 2026, Oliver & Ohlbaum analysis

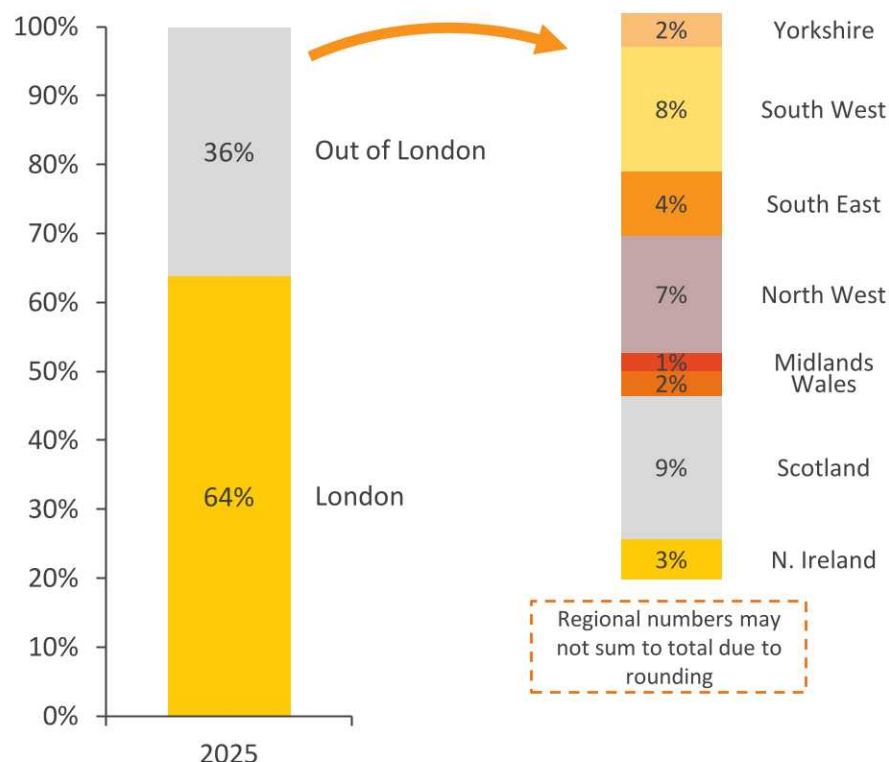
The proportion of employment outside of London remained stable in 2025

The share of employment held steady at 36% in 2025, compared with 38% in 2024, but the regional mix shifted with real-terms growth in Northern Ireland and Scotland. The latter now accounts for 25% of out-of-London employment

Direct employment by region, 2025

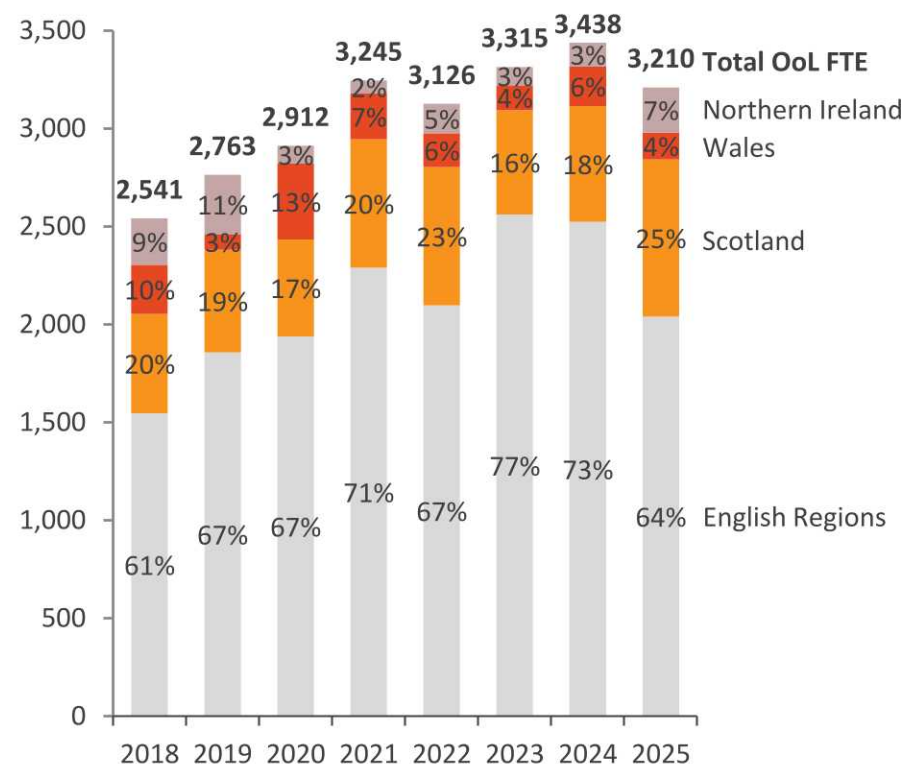
% of direct, full-time equivalent employment within producers included in the census

Total direct employment = 8,889 FTE*



Out of London employment by area, 2018 – 2025

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%, and Anglia, at 0%, are not visible on the graph above

Source: Pact UK Television Production Census 2026, Oliver & Ohlbaum analysis

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